

Ushering in a New IT Infrastructure Era Through the Zero Approach

December 2021: Complimentary Abstract / Table of Contents



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Introduction of the research

Ushering in a new IT infrastructure era through the Zero approach

- COVID-19 has had a significant impact on IT services at a global scale including enterprise demand reduction, supply chain disruption, challenges in business continuity, financial viability of firms, cybersecurity risks, and services continuity challenges. As the globe recovers from the pandemic, IT infrastructure will have a key role to play in revitalizing enterprises and in helping them meet their objectives
- Enterprise needs to reevaluate how IT infrastructure needs to be conceived/built/implemented/managed to meet the challenges posed by the post-pandemic world
- The **Zero infrastructure approach**, which focuses on **Zero experience** and **Zero build**, can address two essential IT infrastructure paradigms that enterprises are facing:
 - The paradigm of experiencing secure, touch-less, and disruption-less IT infrastructure
 - The paradigm of building cost-effective, environmentally conscious, and asset-light IT infrastructure

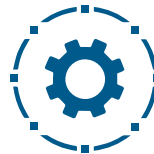
The scope of this report includes:

- IT services market size (split across applications, consulting, infrastructure services, geographies, and industry verticals)
- Infrastructure Services (IS) buyer adoption trends across geographies, industry verticals, and revenue sizes
- Key trends shaping the cloud and IS market (exploring Zero infrastructure approach)

Scope of this report:



Geography
Global



Services
IT infrastructure services

Overview and abbreviated summary of key messages

Enterprises emerging from the COVID-19 pandemic and resulting business challenges must pause and reevaluate their approach toward IT infrastructure to meet the requirements of the next normal. The pandemic and the resulting turmoil have exposed enterprises to a set of challenges such as increased cyber threats precipitated by bigger attack surfaces, talent crunch, financial insecurity, and climate change. At the same time, for enterprises to remain competitive and meet their ambitions, they need to aggressively pursue digitization. Zero approach infrastructure offers enterprises a model to meet both internal and external aspirations. This research provides fact-based trends impacting the cloud and infrastructure services market. It analyzes multiple aspects such as overall cloud and infrastructure service market size, deal sizes, deal durations, and pricing

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

Major highlights

- In the pre-COVID-19 world, the IT cloud and infrastructure services market was slated to grow at a modest rate of 2-3%. However, pandemic-induced changes resulted in a growth of 3-4% led by acceleration in segments such as cloud services, network services, and security services
- Enterprises should view the pandemic and the resulting challenges as catalyst for rehauling and modernizing their IT infrastructure
- IT infrastructure needs to be highly secure, automated, and highly reliable with minimum downtime to meet the challenges. At the same time, the IT infrastructure operating model must also move away from capital expenditure, seek avenues of self-funding transformation, and be environmentally conscious

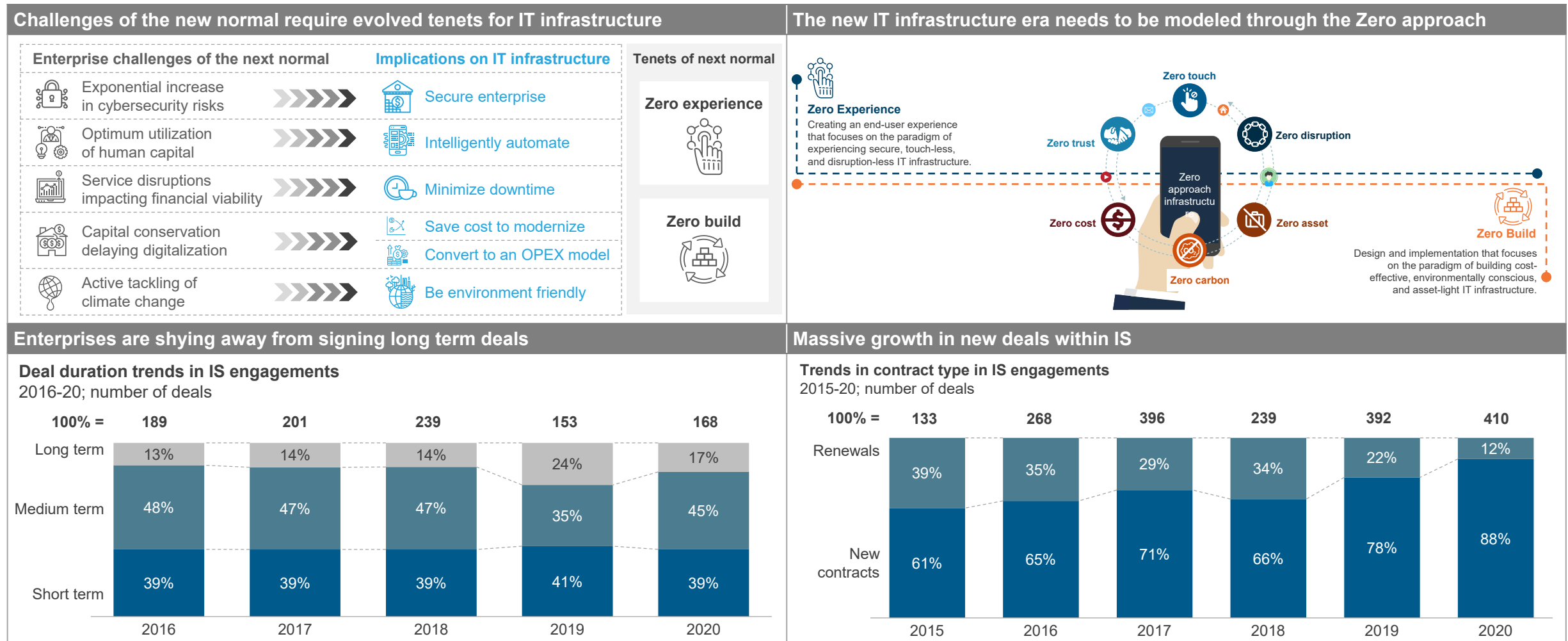
Ushering in a new IT infrastructure era through the Zero approach

- The Zero infrastructure approach, which focuses on Zero experience and Zero build, can address the dual paradigm that enterprises are facing:
 - The paradigm of experiencing secure, touch-less, and disruption-free IT infrastructure
 - The paradigm of building cost-effective, environmentally conscious, and asset-light IT infrastructure
- The Zero infrastructure approach, when implemented in a holistic way can help enterprises entirely address the internal IT operational inefficiencies as well as meet external business challenges

IS deal trends

- Deal size increased in 2020 despite COVID-19 pressures with enterprises looking to consolidate their vendor portfolios. Demand for higher value services in next-generation technologies such as IoT and AI have also contributed to deal sizes
- Proportion of long-term deals declined in 2020 primarily due to uncertainties induced by the COVID-19 pandemic

This study offers two distinct chapters providing a deep dive into key aspects of IT infrastructure services market; below are four charts to illustrate the depth of the report



Research calendar

Cloud and Infrastructure Services (CIS)

■ Published ■ Planned ■ Current release

Flagship reports

Release date

System Integrator (SI) Capabilities on Google Cloud Platform (GCP) Services Compendium 2021	December 2020
Cloud Hyperscalers: A Critical but Not the Only Building Block of Enterprise IT	June 2021
IT Managed Security Services (MSS) PEAK Matrix® Assessment 2021	June 2021
State of the Market: IT Infrastructure Automation Services	June 2021
Network Transformation and Managed Services PEAK Matrix® Assessment 2021	July 2021
Software-defined Wide Area Network (SD-WAN) Services PEAK Matrix® Assessment 2021	September 2021
Mainframe Services PEAK Matrix® Assessment 2022	November 2021
Ushering in a New IT Infrastructure Era Through the Zero Approach	December 2021
Cloud Services PEAK Matrix® Assessment 2022 – North America	Q4 2021
Cloud Services PEAK Matrix® Assessment 2022 – Europe	Q4 2021

Thematic reports

Release date

Future-proofing Enterprise Transformation with Cloud-agnostic Managed Services	February 2021
Upcoming Contract Renewals – Infrastructure Services 2021	March 2021
Enterprise Pulse Report: From Dissatisfaction to Delight: Sustaining Client Satisfaction in a Post-pandemic World	March 2021
Tech Bytes for Business Leaders: Containers	August 2021
Tech Bytes for Business Leaders: Workplace-as-a-Service (WaaS)	August 2021

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