



# IDC Directions 2021

Canada

## Digital Resiliency: Adapting to Competitive Forces & Creating an Autonomous Enterprise

Rick Villars

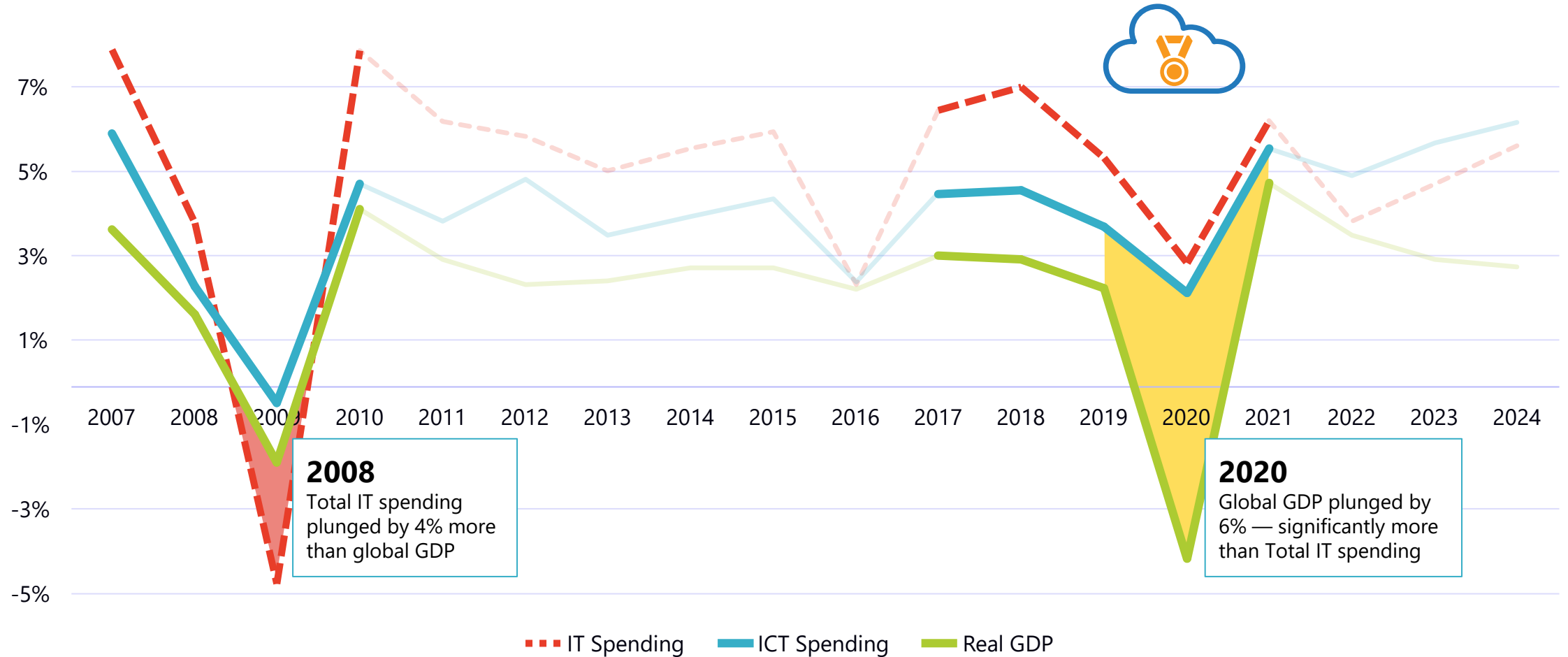
Group Vice President, Worldwide Research

@rvillars





## It Was Different this Time...



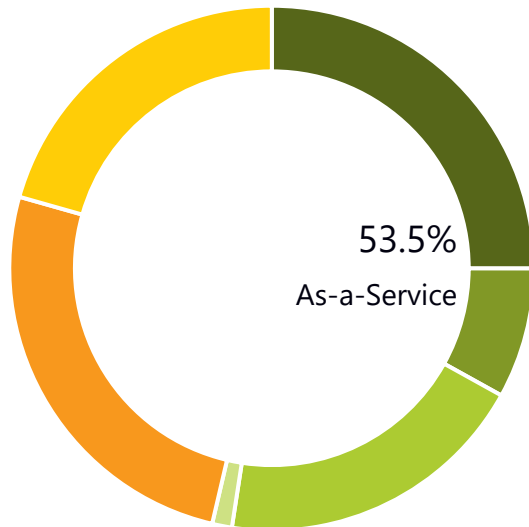
Source: IDC Worldwide Black Book (February 2021); growth in constant currency; "IT Spending" excludes telecom spending, business services and emerging technologies (IoT sensors and connectivity, drones/robots, 3D printers, AR/VR viewers, next-gen security, OT software and services)



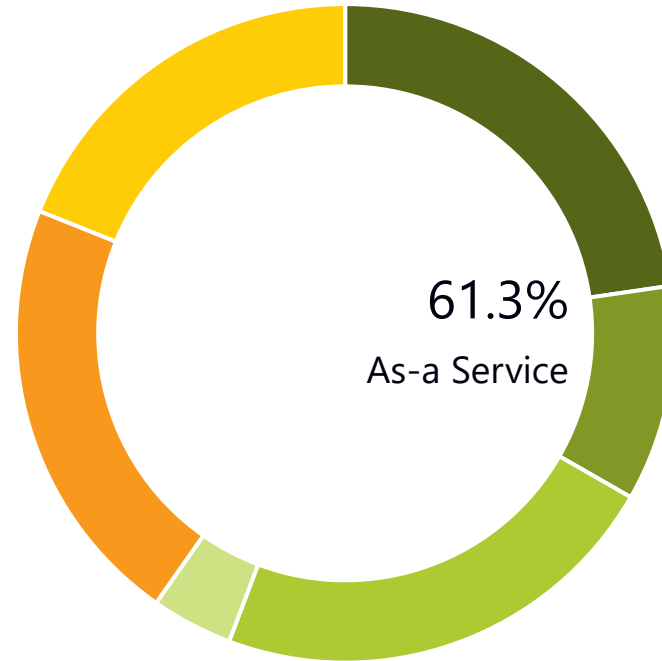
## Worldwide Whole Cloud Outlook

Cloud accounts for 41% of all DX spend

2020 (\$632.3B)



2024 (\$1,003B)



- Business SaaS
- IT aaS (Infra & Sys SW)
- Cloud-Related Services
- PaaS
- Dedicated Cloud aaS
- Cloud Buildout (HW, SW, Support)

- Fastest growing sectors
  - Data-centric aaS
  - Location-centric aaS (network/edge)
- Outcomes becoming primary investment focus for end customers and ISV/Developers
  - End Customers (SaaS and DaaS)
  - ISV/Dev (IaaS and PaaS)
  - Emphasis on rapid access to technology, mutual profit, and community
- Complex Cloud deployments become the norm
  - Managing cloud resources are the primary challenges for IT organizations in the coming years

Source: Worldwide Whole Cloud Forecast 2020-2024, October 2020, IDC #US46020420

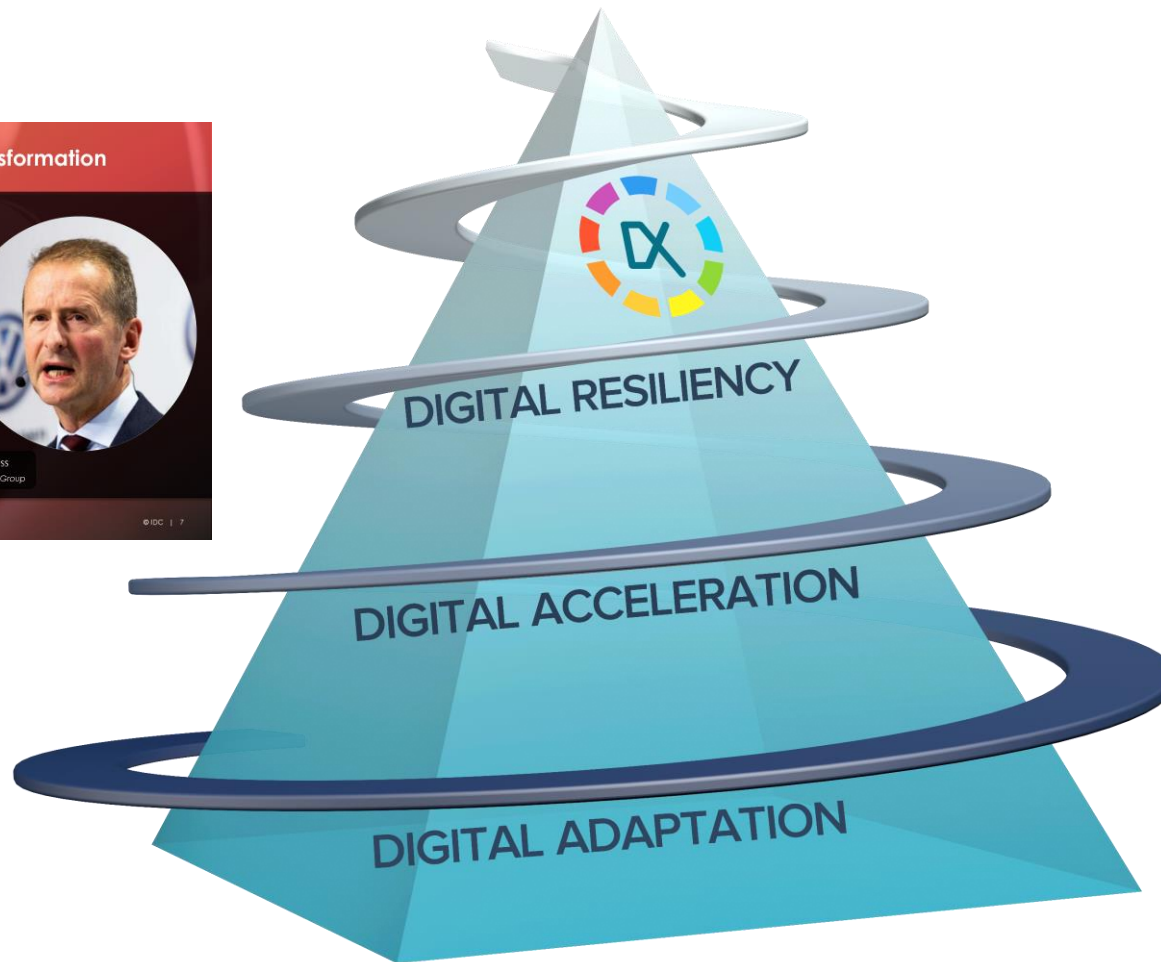
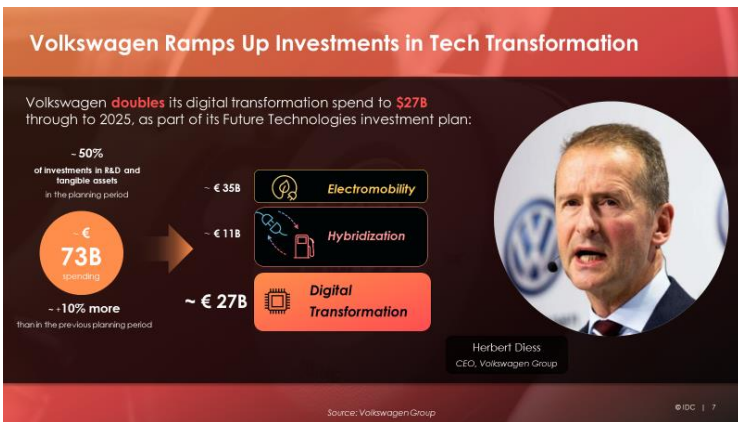
# Lesson from 2020

## Digital Resiliency is at the Core of DX



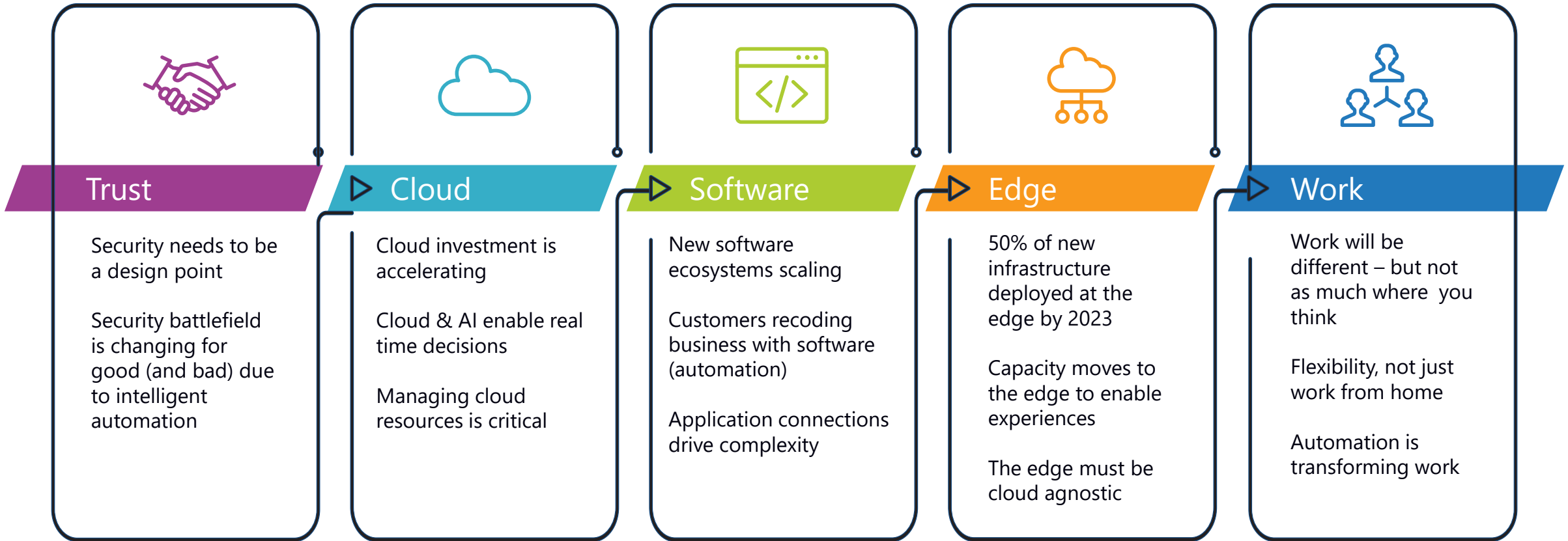
# Digital Resiliency

The Quicker One Adapts, the Sooner One Can Accelerate





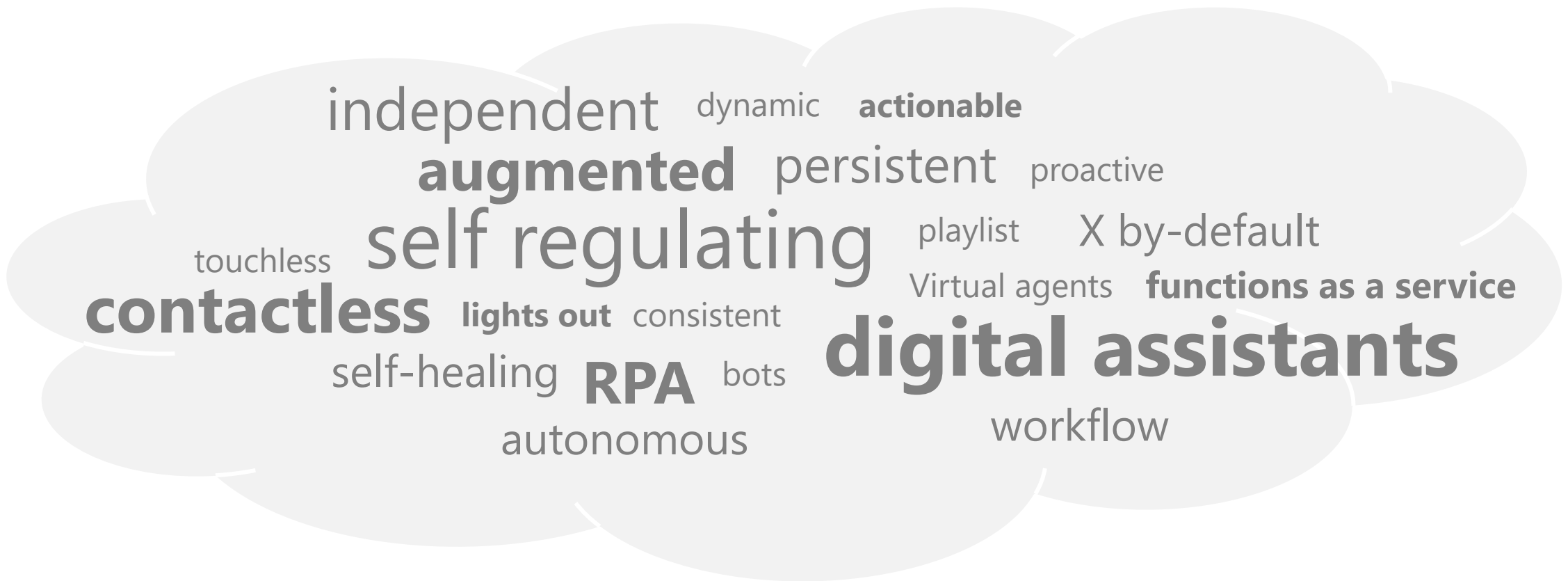
# Top Areas for More Adaptation Investment





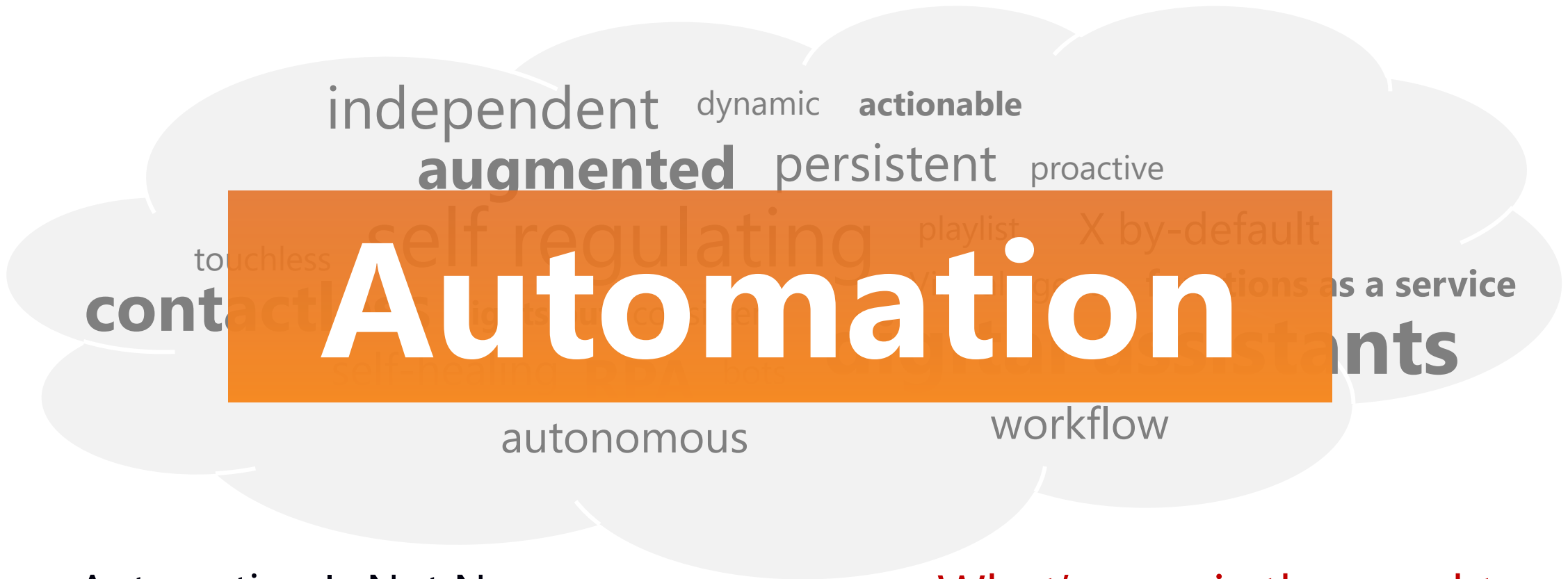


# The Next Normal is About Acceleration





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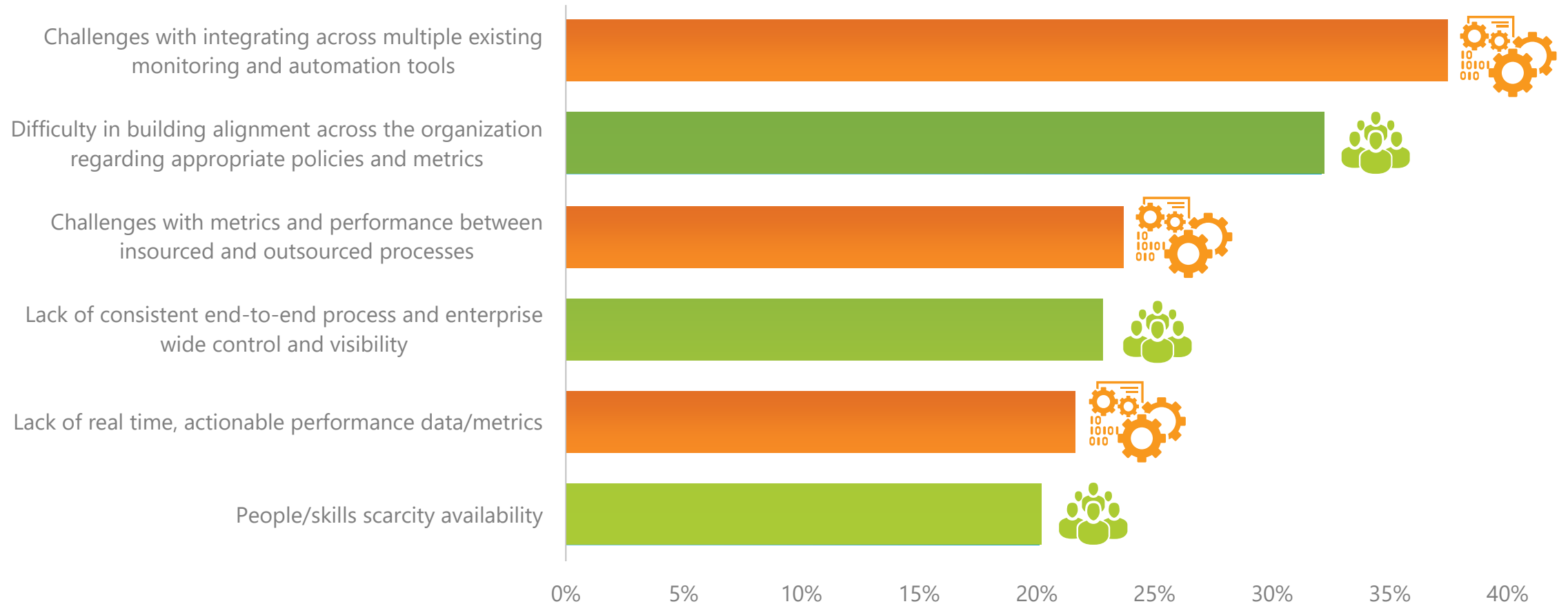
Automation Is Not New

What's new is the need to employ automation at scale

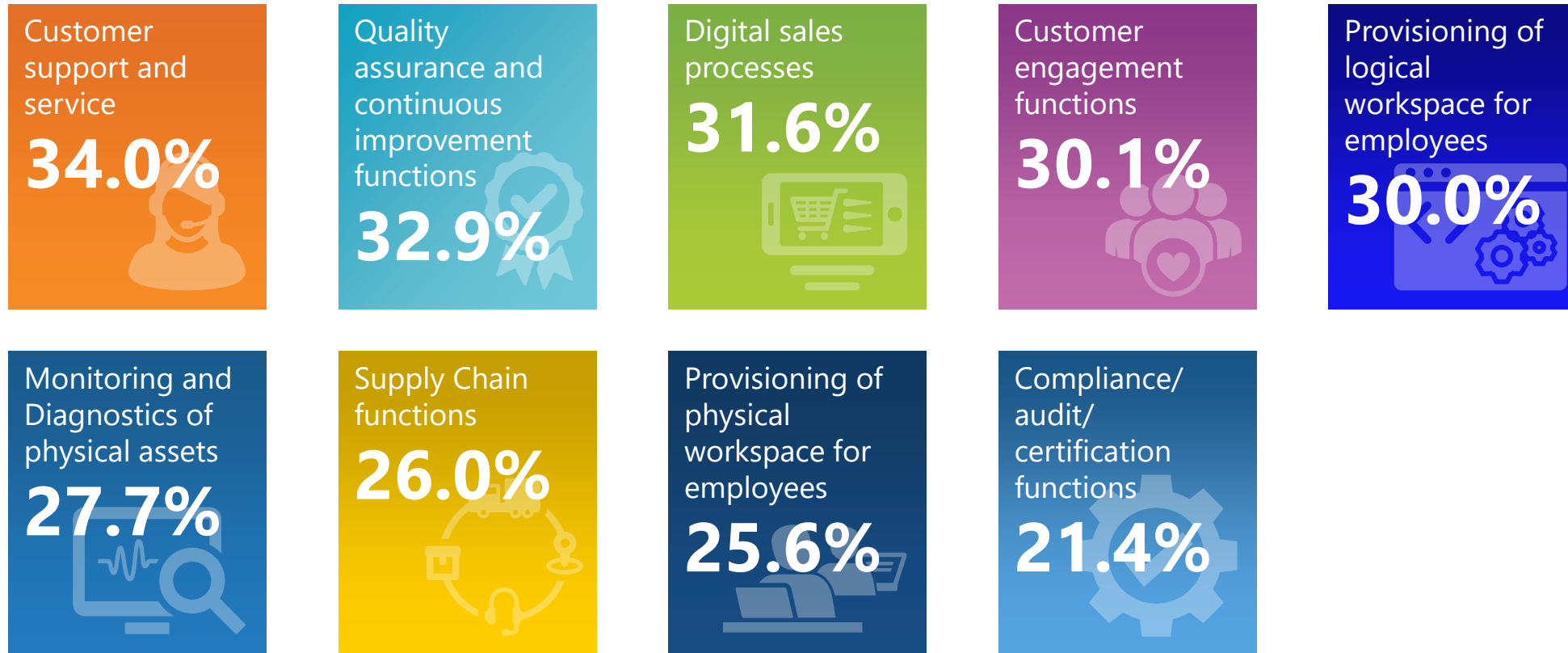




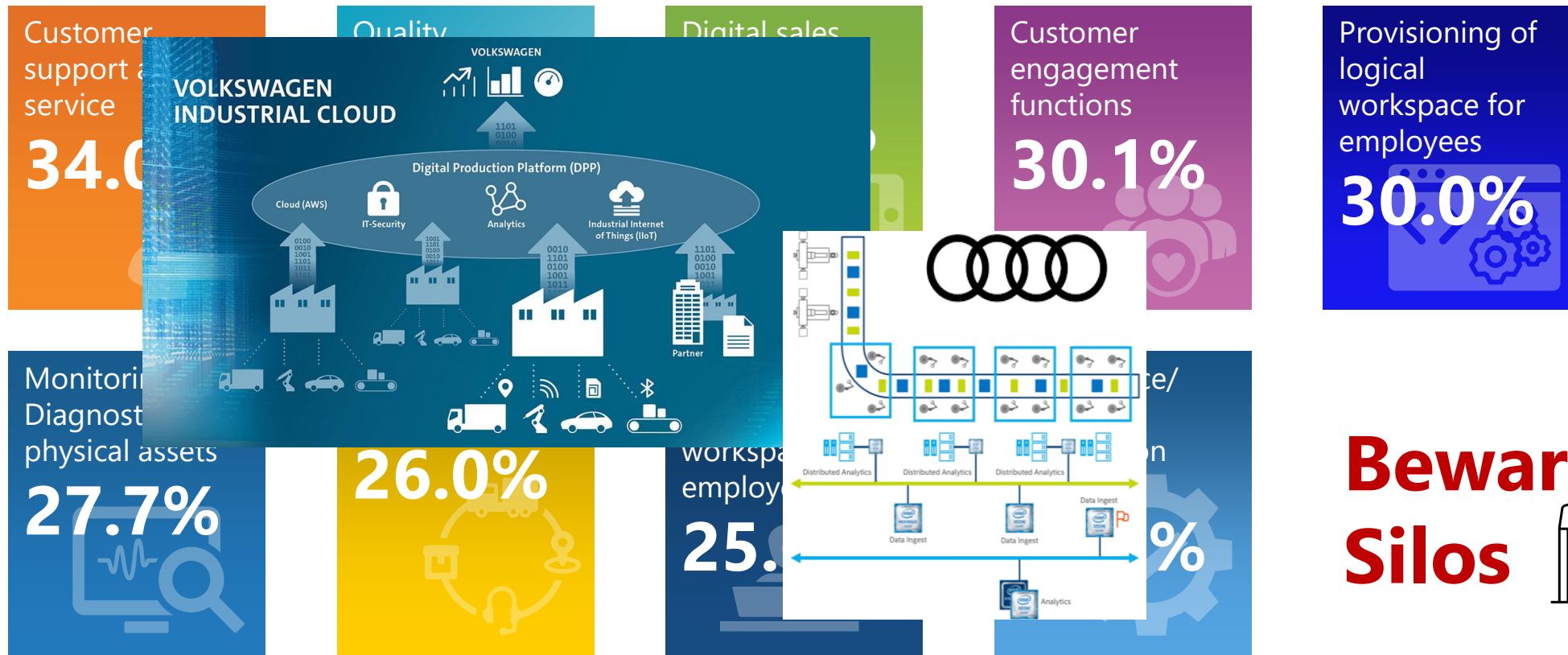
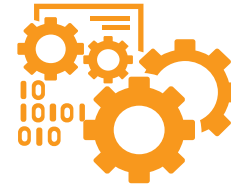
# Top Barriers to Gaining Value from Automation Across the Enterprise



# "Business Automation" Is the Thing this Year



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# Create an Autonomic Nervous System (ANS) for the Enterprise



## Consistent, Coherent, Cooperative Automation

Common data and app definitions/rules (Open Telemetry)



1

Ubiquitous access to compute/memory resources (Dedicated Clouds & MEC)



2

Standard processes for moving data (ConnectaaS)



3

Common platform for creating and updating functions (Cloud-native Ecosystem)



kubernetes

4

Collective governance model for orchestration, performance, configuration (Cloud Control Planes)

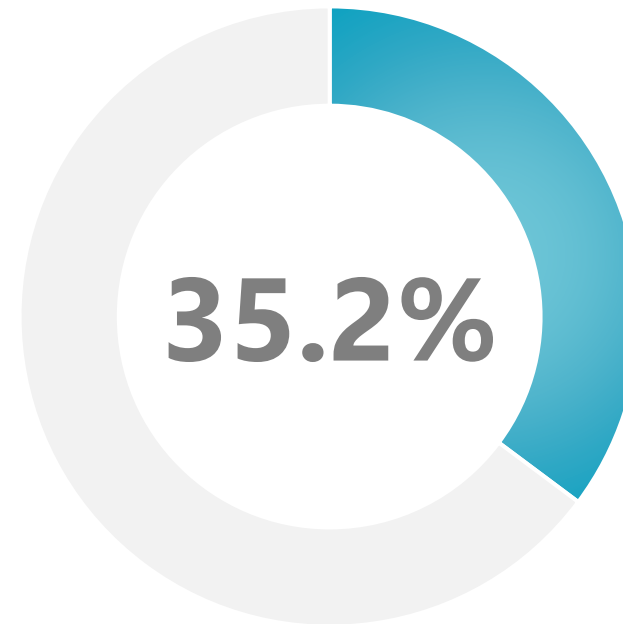


5



## Critical Prediction

By 2023, the emerging cloud ecosystem for extending resource control and real-time analytics will be the underlying platform for all IT and business automation initiatives anywhere and everywhere.



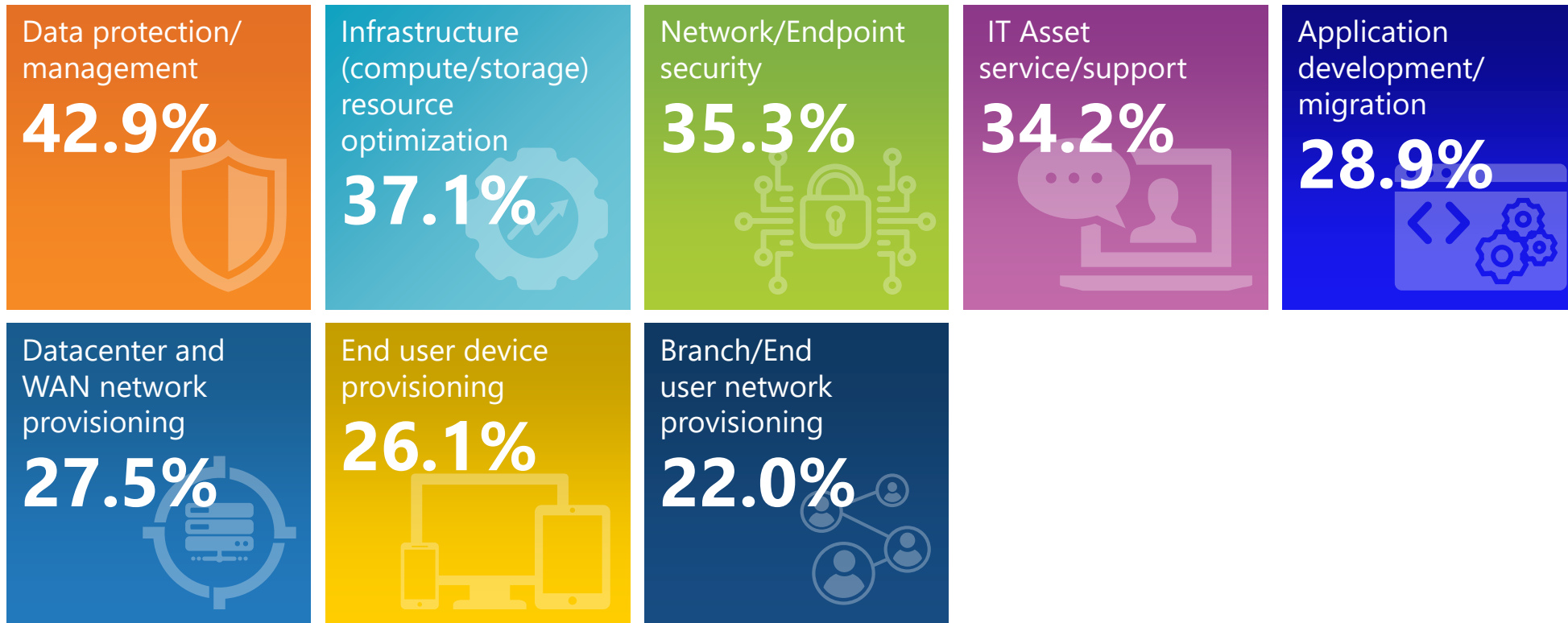
We will accelerate the use of cloud as the underlying platform for IT and business automation initiatives.

Source: COVID-19 IMPACT ON IT SPENDING Survey (Survey conducted during 26th September to 6th October period), IDC, October 2020. 649 WW technology decision makers

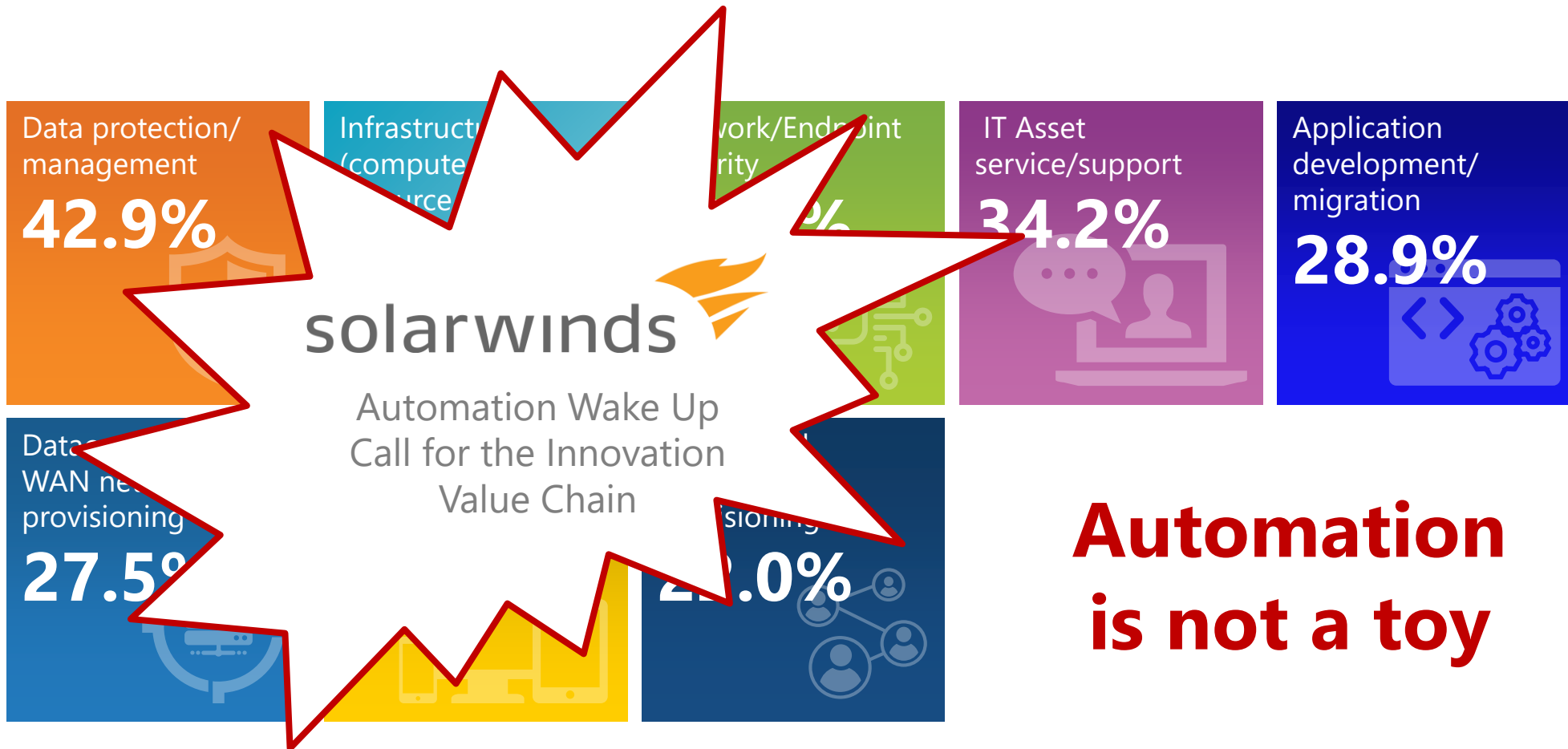
This is not the new Master Control Program!

**It's about providing observability and creating ecosystems**

# "IT Automation" Is the Thing This Year



# "IT Automation" Is the Thing This Year



**Automation  
is not a toy**





# People Still Matter in Automation

Through 2023, **half of enterprises' hybrid workforce and IT automation** efforts will be delayed or will fail outright due to underinvestment in building IT/Sec/DevOps teams with the right tools/skills



AI/ML can enable dynamic self-regulation

**People must still set the goals & assess the results**



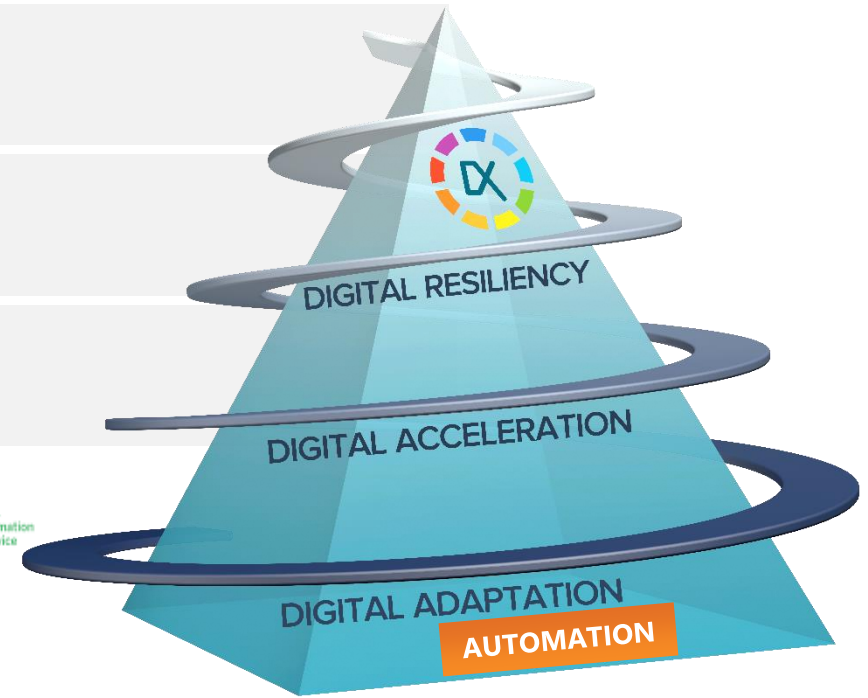
## Essential Guidance

Using technologies to thrive in the next normal

**Automation will be the foundation**

**Avoid proliferation of silos**

**Lead by doing**



NETAPP KEYSTONE



**NEW:** Cisco Plus

VMware Cloud Universal



# IDC Directions 2021

Canada

# THANK YOU

