

Everest Group PEAK Matrix[®] for Aware (Intelligent) IT Infrastructure Services Automation Service Providers 2021

Focus on IBM
December 2020



Background of the research

- The COVID-19 pandemic has become a human crisis of epic proportions, threatening lives and well-being of global communities. Enterprises have found it challenging to cope with the volatility and uncertainty of the situation. COVID-19 has had a significant impact on IT services at a global scale, resulting in enterprise demand reduction, supply chain disruption, challenges in business continuity, cybersecurity risks, and services continuity challenges
- With recessionary signs and muted market demand, many enterprises continue to face pressures to maintain operational vitality and meet financial obligations. Enterprises are aggressively seeking efficiency, optimization measures, and avenues for business growth. Consequently, automation has become one of the key optimization levers for IT infrastructure services, with 74% of enterprises believing that **automation usage** should be increased¹.
- In this research, we present an assessment of 18 IT infrastructure services automation providers featured on the services Aware (Intelligent) IT Infrastructure Services Automation PEAK Matrix®

The assessment is based on Everest Group's annual RFI process conducted over Q1 and Q2 2020, interactions with leading digital workplace service providers, and analysis of the digital workplace services marketplace.

This report includes the profiles of the following 18 leading service providers featured on the Aware (Intelligent) IT Infrastructure Services Automation PEAK Matrix®:

- **Leaders:** HCL Technologies, IBM, TCS, and Wipro
- **Major Contenders:** Accenture, Cognizant, CSS Corp, DXC Technology, GAVS Technologies, Genpact, Infosys, Microland, Mphasis, Tech Mahindra, and UST Global
- **Aspirants:** Happiest Minds, Virtusa, and Zensar

Scope of this report:



Geography
Global



Service providers
18 leading IT infrastructure
services automation providers



Services
IT infrastructure services
automation

¹ Based on Everest Group's survey with 50+ CXOs to gauge enterprise response to COVID-19

Aware (Intelligent) IT infrastructure services automation PEAK Matrix® characteristics

Leaders:

HCL Technologies, IBM, TCS, and Wipro

- Leaders in the IT infrastructure services automation space display a clear vision, strategy, and well-established capabilities for enabling large-scale automation deployments for enterprises
- Leaders have significant proof points to showcase the value delivered through a combination of intelligent automation and cognitive/AI-driven automation
- Vision, capabilities, and enterprise proof points are balanced across the IT infrastructure services spectrum (e.g., cloud & datacenter, network, workplace, and IT operations)
- Leaders continue to keep pace with the market dynamics through continued investments in technology and services capability development, focusing on next-generation automation concepts such as AI and cognitive computing, and development of next-generation talent such as AI architects and SRE
- Leaders focus on developing IT infrastructure automation capabilities by balancing investments in developing in-house solutions that provides differential value-added services on top of industry-standard automation tools

Major Contenders:

Accenture, Cognizant, CSS Corp, DXC Technology, GAVS Technologies, Genpact, Infosys, Microland, Mphasis, Tech Mahindra, and UST Global

- Major Contenders have built meaningful capabilities to deliver IT infrastructure services automation for enterprises; however, their service portfolios are not as balanced and comprehensive as those of Leaders (either in terms of coverage across IT infrastructure service segments or maturity/complexity of enterprise proof points or both) – this is also reflected in the scale of value delivered by these players (vis-a-vis Leaders)
- While a few players have a clear focus on providing technology-agnostic automation services leveraging industry-standard tools (based on the choice of the customer), the rest have made significant investments in building their IP

Aspirants:

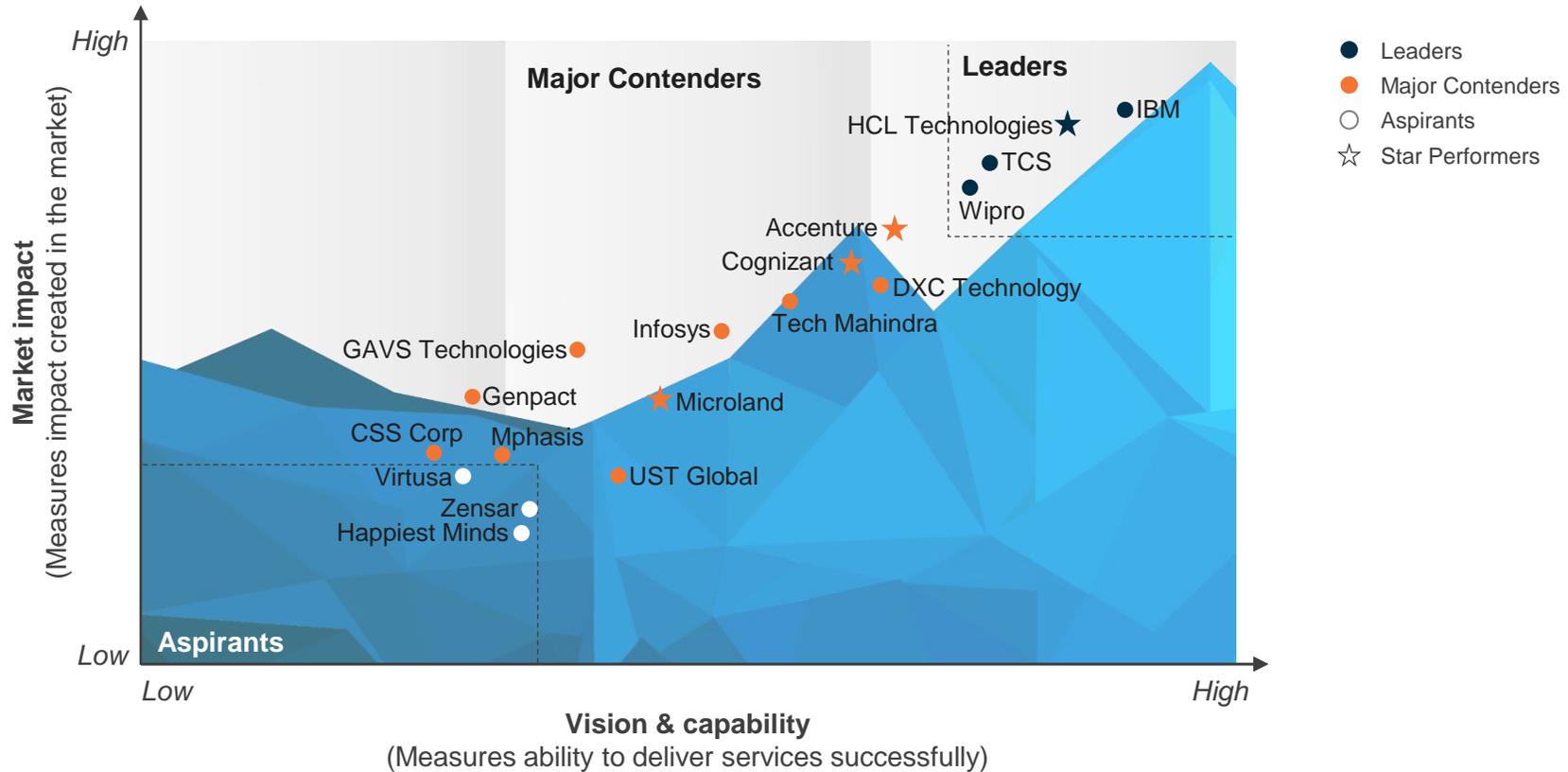
Happiest Minds, Virtusa, and Zensar

- The IT infrastructure services automation business of Aspirants is in the initial stages of growth and is currently undergoing maturation
- While these service providers are making investments for building delivery capabilities and IP/toolsets, their ability to develop meaningful IT infrastructure services automation consulting and implementation services strengths will hold the key to creating market awareness and credibility

Everest Group PEAK Matrix®

Aware (Intelligent) IT Infrastructure Services Automation PEAK Matrix® Assessment 2021 | IBM positioned as Leader

Everest Group Aware (Intelligent) IT Infrastructure Services Automation PEAK Matrix® Assessment 2021



Note: Assessment for DXC Technology, Tech Mahindra, and UST Global excludes service provider inputs and is based on Everest Group's proprietary Transaction Intelligence (TI) database, ongoing coverage of these service providers, service provider public disclosures, and Everest Group's interactions with buyers

Source: Everest Group (2020)

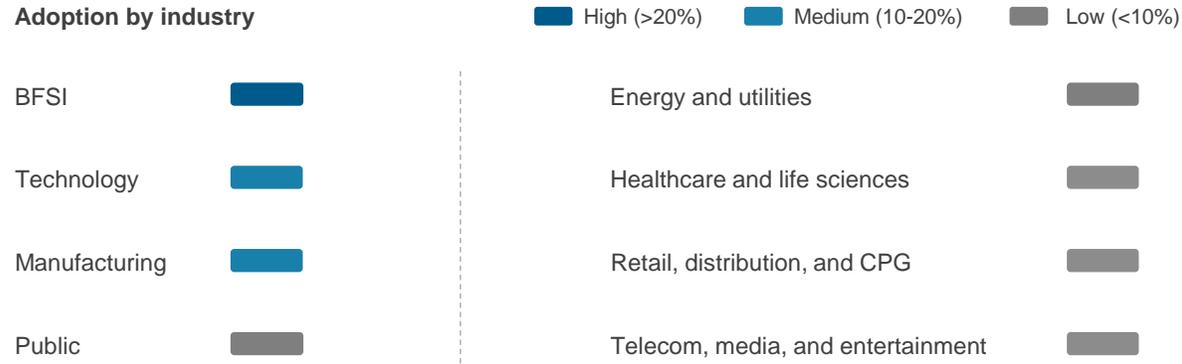
IBM | Aware IT infrastructure services automation services profile (page 1 of 5)

Overview

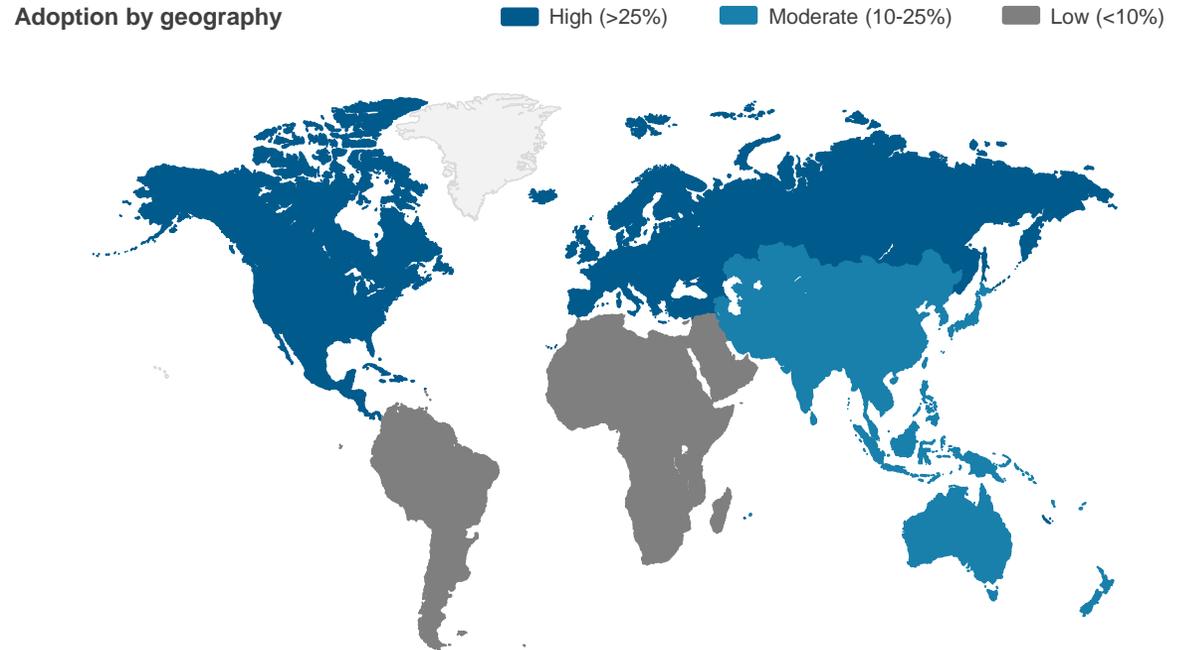
IBM's vision for intelligent, aware IT infrastructure services automation focuses on three key themes:

- 1. Ai-based automation for self-learning and self-healing:** IBM aims to use AI for non-deterministic use cases and partners AI-based insights with automation to create autonomic, self-learning, and self-healing IT. These AI-based automation solutions are applied across a client's heterogeneous IT landscape, automating all workloads irrespective of hosting environments
- 2. Integrated automation with security and compliance across hybrid and multi-cloud:** To facilitate accelerated digital transformation, IBM attempts to use cloud native capabilities together with AI-based automation for managed applications to reduce the overall IT management effort and cost, and to enable improved performance, agility, security, and intelligence
- 3. Self-service automation community model:** To fully and continually optimize IT infrastructure services, IBM intends to enable new ways of working that leverage AI-based automation for zero touch capabilities along with self-service empowerment with the IBM Cloud Automation Community Framework (CACF), based on Red Hat Ansible and OpenShift container platform

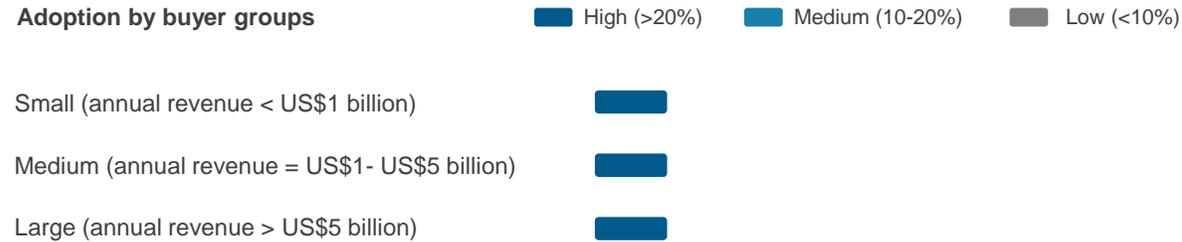
Adoption by industry



Adoption by geography



Adoption by buyer groups



IBM | Aware IT infrastructure services automation services profile (page 2 of 5)

Solutions

Proprietary solutions (representative list)

Solution	Scope	Details of the tool/solution
IBM Cloud Automation Community Framework (CACF)	Cloud	IBM's Cloud Automation Community Framework is a Red Hat Ansible / OpenShift (OCP)-based Framework designed to enable higher value to clients across multiple use cases including incident remediation/prevention, patch scanning, security compliance (health check and enforcement), service request fulfillment, and server build and decommission.
IBM Automation as a service	Overall IT infrastructure	IBM's suite of automation service offerings that includes cloud native automation consulting, enterprise-grade Infrastructure DevOps platform, and cloud-based automation for incident remediation, patch scanning, security compliance, and service request fulfillment.
IBM Multi-cloud Management Platform (MCMP)	Cloud	IBM MCMP is a digital consumption and delivery platform, with integration and orchestration layers, that aims to support multiple technology stacks across a multi-vendor platform. Stakeholders and end-users can support their cloud journey by optimizing cloud spend and usage, managing services mapping and dependencies with appropriate integration with ITSM tools, and extending DevOps processes for traditional IT and cloud natives. AIOps console is a purpose-built application that aims to leverage machine learning to enable enterprise IT departments or managed service providers to have access to actionable service inventory and health metrics, across a hybrid IT environment, for visibility, operations, diagnostics, recommendations, and automated remediation. AIOps builds on an extensible and modern data lake and is leveraged by hundreds of clients.
IBM Multi-cloud Management Services	Cloud	IBM's Multi-cloud Management Services provide consistent managed services across hybrid and multi-cloud environments in "as-a-Service" consumption models. The portfolio leverages flexible and modular tools enabled with secure, microservices, and API interface architecture. Aims to offer real-time managed services on multi-cloud workloads, flexibility to customize client touchpoints, and visibility across diverse environments. MCMP AIOps console is intended to be a purpose-built application that leverages machine learning to enable enterprise IT departments or managed service providers to actionable service inventory and health metrics, across a hybrid IT environment, for visibility, operations, diagnostics, recommendations, and automated remediation.
IBM Multi-cloud Deployment Services	Cloud	IBM's Multicloud Deployment Services provide an intelligent, fully-managed, and multi-cloud orchestration and automation platform for both container and virtualization workloads, powered by blueprints that intend to help in developing and deploying cloud native infrastructure apps and data across public, private, and hybrid clouds as well as containers, Kubernetes, and microservices.
IBM Services Cloud Network Intelligent Control Center	Network	Cloud-based network services for network orchestration, automation, and client dashboards. Aims to provide intent based orchestration for Virtual Network Functions and idempotent automation within the network domain. Client dashboards intend to provide a single pane of glass view across the network estate including traditional, virtual, and cloud. Integrated AIOps capabilities detect network anomalies, and self-healing capabilities restore failing network services automatically.
IBM QuickStart	ITSM	QuickStart is the IBM packaged ITSM process content for a common set of ITIL best practices. QuickStart intends to provide capabilities to address the growing requirement for automation in a cloud environment, aiming to automate as much as possible the execution of ITIL processes without impacting overall performance in a cloud. QuickStart also aims to address DevOps and Continuous Improvement / Continuous Deployment (CI/CD).
Software Defined Infrastructure Control (SDIC)	Overall IT infrastructure	SDIC is a hybrid-cloud optimization service that leverages machine learning to optimize hybrid cloud infrastructures (on-premises and public clouds). As part of SDIC optimization, IBM partners with Densify to match the optimal cloud resources to build applications, deliver improved application stability & performance, and increase operational efficiency and financial value.

IBM | Aware IT infrastructure services automation services profile (page 3 of 5)

Partnerships

Partnerships (representative list)

Partner name	Scope	Details of the partnership
Red Hat	Overall IT infrastructure	IBM's strategic acquisition closed in 2019, Red Hat delivers a significant portfolio of enterprise class cloud solutions, including in the automation space. Red Hat products such as Ansible and Ansible Tower are now being extensively deployed across the IBM client base.
AT&T	Network and cloud	AT&T Business is one of IBM's partners that helps transform IBM's networking solutions with technologies including 5G, edge compute, and IoT, as well as multi-cloud capabilities using Red Hat.
ELK Stack	Cloud	IBM leverages the ELK Stack (Elasticsearch, Kibana, Logstash) to take data from CDI Data Lake, claimed to have more than 200+ data sources, in any format, then search, analyze, and visualize it in real-time with user-driven reports in MCMP AIOps offering and in CDI automation dashboards.
ServiceNow	Overall IT infrastructure	IBM and ServiceNow are aiming to help businesses realize value faster through solutions in service management, IT operations management, and workplace support that intend to harness the automation from the ServiceNow platform and AI capabilities from IBM Watson.
VMware	Cloud	IBM and VMware aim to help enable enterprise hybrid cloud adoption through a suite of joint solutions that accelerate the migration of critical VMware workloads to IBM's public cloud in a highly secured, open environment. IBM claims to be one of the world's largest operators of VMware workloads, with over 15 years of experience.
Automation Anywhere	Overall IT infrastructure	IBM leverages Automation Anywhere across IT and business use cases, including workplace support services. Aims to digitize operations and drive new efficiencies across business processes by automating and simplifying data-intensive tasks.
BluePrism	Overall IT infrastructure	The collaboration integrates three core capabilities of IBM Cloud Pak for Automation, which includes workflow, capture, and decisions, with Blue Prism's Digital Workforce. The objective is to give organizations access to both Blue Prism RPA and an array of interactions with IBM Cloud Pak for Automation capabilities, including business automation workflow, business decision automation, AI, ML, and intelligent document processing, in a single solution. IBM partners with Blue Prism with an aim to deploy software bots for clients globally to drive innovation and improve the overall customer service.
ScienceLogic	Network and cloud	IBM services for multi-cloud management platform incorporate ScienceLogic's SL1 for IT operations and cognitive IT service management.
BMC	ITSM	IBM leverages BMC for supporting all ITIL best practices and CMDB for configuration item reconciliation, with built-in reporting and dashboard capabilities on each instance.
Citrix	Workplace	IBM and Citrix have 20+ years of partnership. The scope of partnership includes IBM's design and support of on-premise and cloud VDI environments for clients. IBM has global centers of competency to provide support and management for VDI environments regardless of where the client environments are located.
Cisco	Network and cloud	IBM and Cisco are jointly focusing on helping clients through all aspects of digital transformation. IBM and Cisco aim to provide technology, business consulting services, and industry expertise for the hybrid/multi-cloud journey. From consulting to implementation of a migration strategy to the cloud platform and infrastructure, the partnership claims to have the portfolio and skills to implement end-to-end enterprise-grade hybrid cloud solutions. Managed Private Cloud Infrastructure-as-a-Service is a key offering of the partnership. This offering is jointly developed and architected – with Cisco providing compute and networking infrastructure while IBM provides storage infrastructure and the managed services. Private Cloud IaaS helps clients scale as needed with a pay-as-you-go model and aims to eliminate capital expenses and reduce the risks associated with new technology adoption.

IBM | Aware IT infrastructure services automation services profile (page 4 of 5)

Investments and recent activities

Investments and recent activities (representative list)

Theme	Scope	Details of the investment
Acquisition	Overall IT infrastructure	The acquisition of Red Hat, closed in 2019, strengthens IBM's position as a hybrid multi-cloud provider and accelerates IBM's high-value business model, extending Red Hat's open source innovation to a broader range of clients. IBM proposes to preserve Red Hat's independence and neutrality. IBM believes that Red Hat will strengthen existing partnerships to give customers freedom, choice, and flexibility.
Investment	Overall IT infrastructure	IBM services platform enables hosting common services with continued development and expansion. Currently, automation solutions are hosted on the platform from hosting locations in Americas, Europe, and Asia Pacific. The platform is used to deploy, manage, and support, systems management and automation solutions. The hosting environment runs on IBM Private Cloud and is a landing zone for any managing solutions that need to be hosted in a secure and compliant way for clients.
Investment	Overall IT infrastructure	IBM's Cloud Automation Community Framework is a Red Hat Ansible / OpenShift (OCP)-based Framework designed to enable higher value to clients across multiple use cases including incident remediation/prevention, patch scanning, security compliance (health check and enforcement), service request fulfillment, and server build and decommission <ul style="list-style-type: none"> • Automates manual processes to get to zero-touch and self-heal, thereby accelerating productivity and problem resolution • Enables multiple use cases for broad client value-addition • Supports hybrid and native cloud-based workloads to enable client's journey to cloud • Enables a community model to allow for faster automation deployment and client-specific content creation
Investment	Overall IT infrastructure	SDE Automated Provisioning leverages Red Hat CloudForms (now part of the IBM CloudPak for MultiCloud Management) to develop and deploy self-service automation for compute, storage, and network datacenter services in the managed private cloud and managed extended cloud IaaS portfolios. CloudForms provides both an API and interactive portal for provisioning infrastructure services.
Investment	Overall IT infrastructure	Security Regulatory and Risk Management (SRRM) is an end-to-end and AI-based capability for compliance management for hybrid multi-cloud workloads and in part leverages IBM Cloud Paks for Cloud Security Posture Management (CSPM).
Investment	Overall IT infrastructure	MCMP AIOps console is intended to be a purpose-built application that leverages machine learning to enable enterprise IT departments or managed service providers to have access to actionable service inventory and health, across a hybrid IT environment, for visibility, operations, diagnostics, recommendations, and automated remediation. IBM claims to have integrated MCMP AIOps and Watson AIOps with an intent to develop advanced AI-based capabilities for IT operations management for hybrid multi-cloud applications and addressing application outages both reactively and proactively. MCMP incorporates a Dashboarding Common Service based on the ELK stack, which provides a single pane of glass and point for internal and client-facing dashboards.
Investment	Network	SAT Health Check is an innovative, IBM developed solution for managing the health of large complex systems of compute, networking, and storage infrastructure. It discovers and analyzes the topology of the environment, applies hundreds of policies to ensure the operational health, best practice, and compliance of each individual device and of the entire environment. SAT-HC findings for most environments world-wide are fed to MCMP for analysis to predict the risk associated with each environment and device. SAT-HC claims to check over 19,000 devices in over 650 environments each day, improving the quality of infrastructure services

IBM | Aware IT infrastructure services automation services profile (page 5 of 5)

Everest Group assessment – Leader

Measure of capability:  High  Low

Market impact				Vision & capability				
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Talent footprint	Overall
								

Strengths

- IBM's approach toward IT infrastructure automation – AI-based, integrated with compliance and security across hybrid, multi-cloud, and self-service supported by a community model – resonates strongly with enterprise demands
- It has been successful in integrating Red Hat solutions/products/services to modernize automation and develop new automation approaches such as Ansible-based Cloud Automation Community Framework (CACF)
- IBM follows a holistic approach of integrating automation, AIOps, and ChatOps for IT infrastructure delivery operations – lays special emphasis on agile delivery squad with Site Reliability Engineering (SRE) skill sets
- Strong network automation capabilities, spread across edge, access, and core, with value proposition centered around software-enabled orchestration and open source
- Enterprise clients appreciate the depth of expertise around cognitive automation (such as NLP from IBM Watson) and technical capabilities of the delivery team

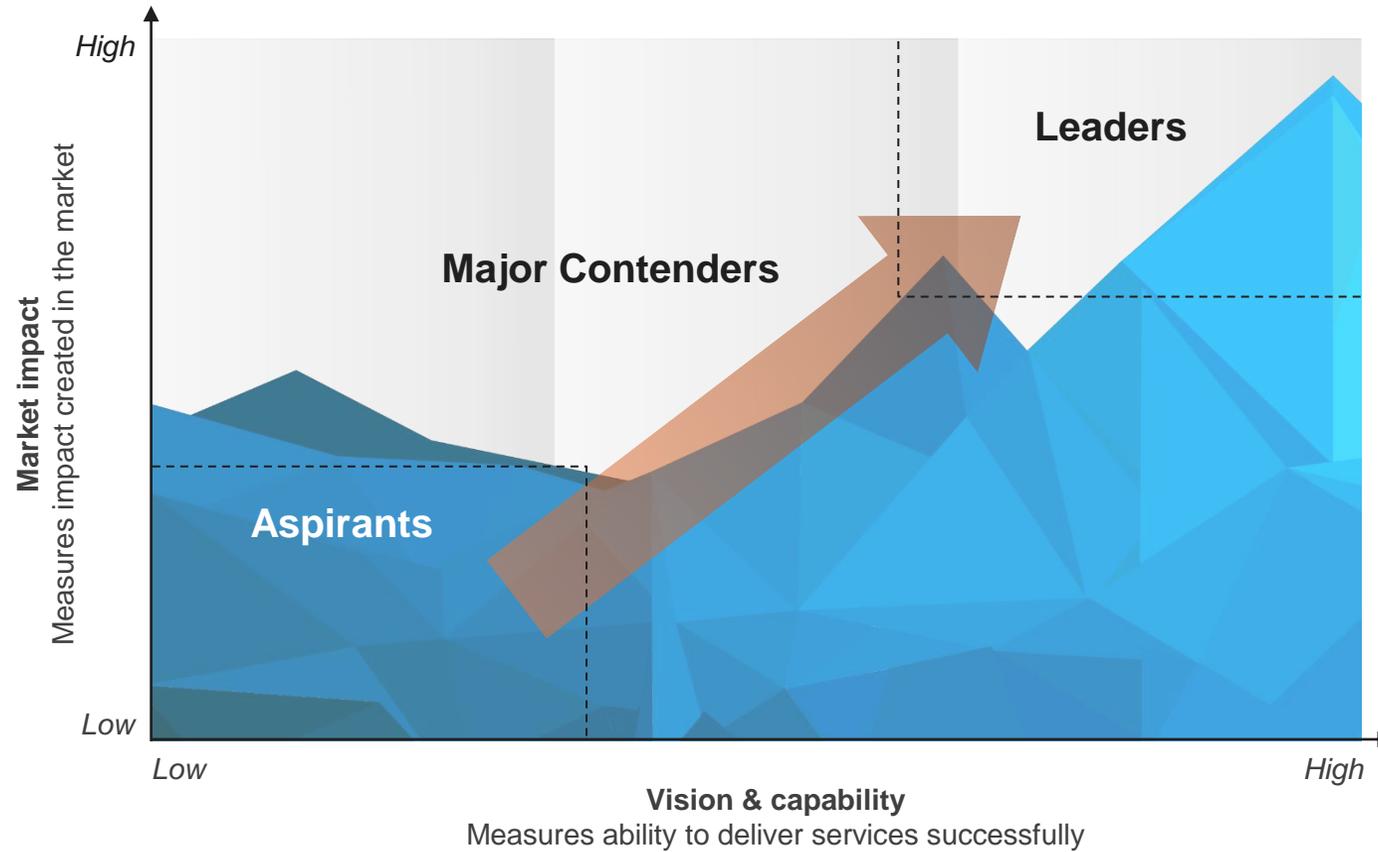
Areas of improvement

- IBM, with its strong product-oriented portfolio – one that is currently skewed toward Red Hat products – is perceived as a player with strong intent to embed automation services in internal IP/products. Needs to drive vendor-agnostic messaging more effectively
- With the enterprise engagement model undergoing changes, the company should explore engagement constructs such as “automation-as-a-service” and enhance modularity of the services portfolio
- While IBM has considerable capability and maturity in delivering IT infrastructure services automation, it needs to be proactive and aggressively push continuous improvement mandates
- A few enterprise clients have expressed concerns about lack of flexibility and visibility in commercials

Appendix

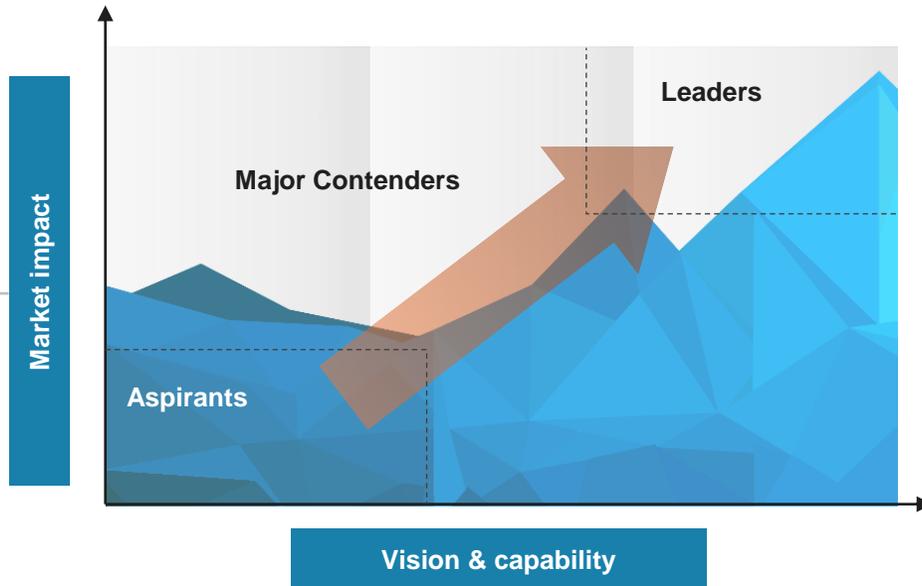
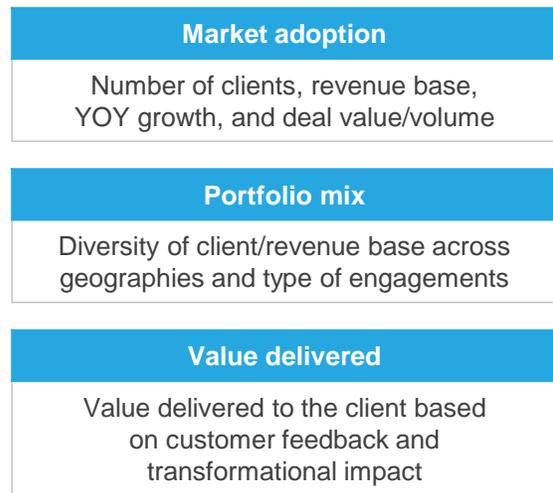
Everest Group PEAK Matrix® is a proprietary framework for assessment of market impact and vision & capability

Everest Group PEAK Matrix®

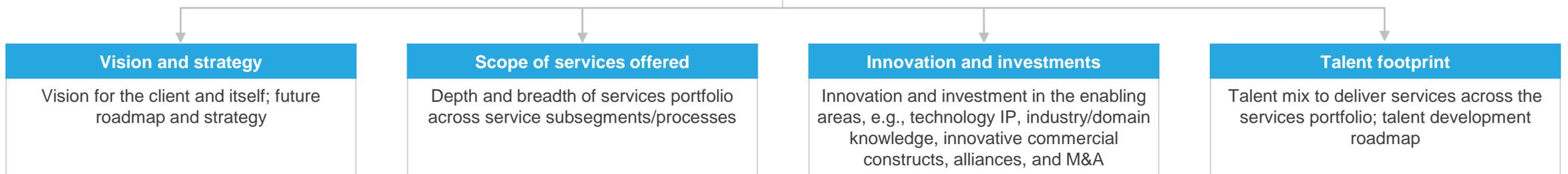


Services PEAK Matrix® evaluation dimensions

Measures impact created in the market – captured through three subdimensions



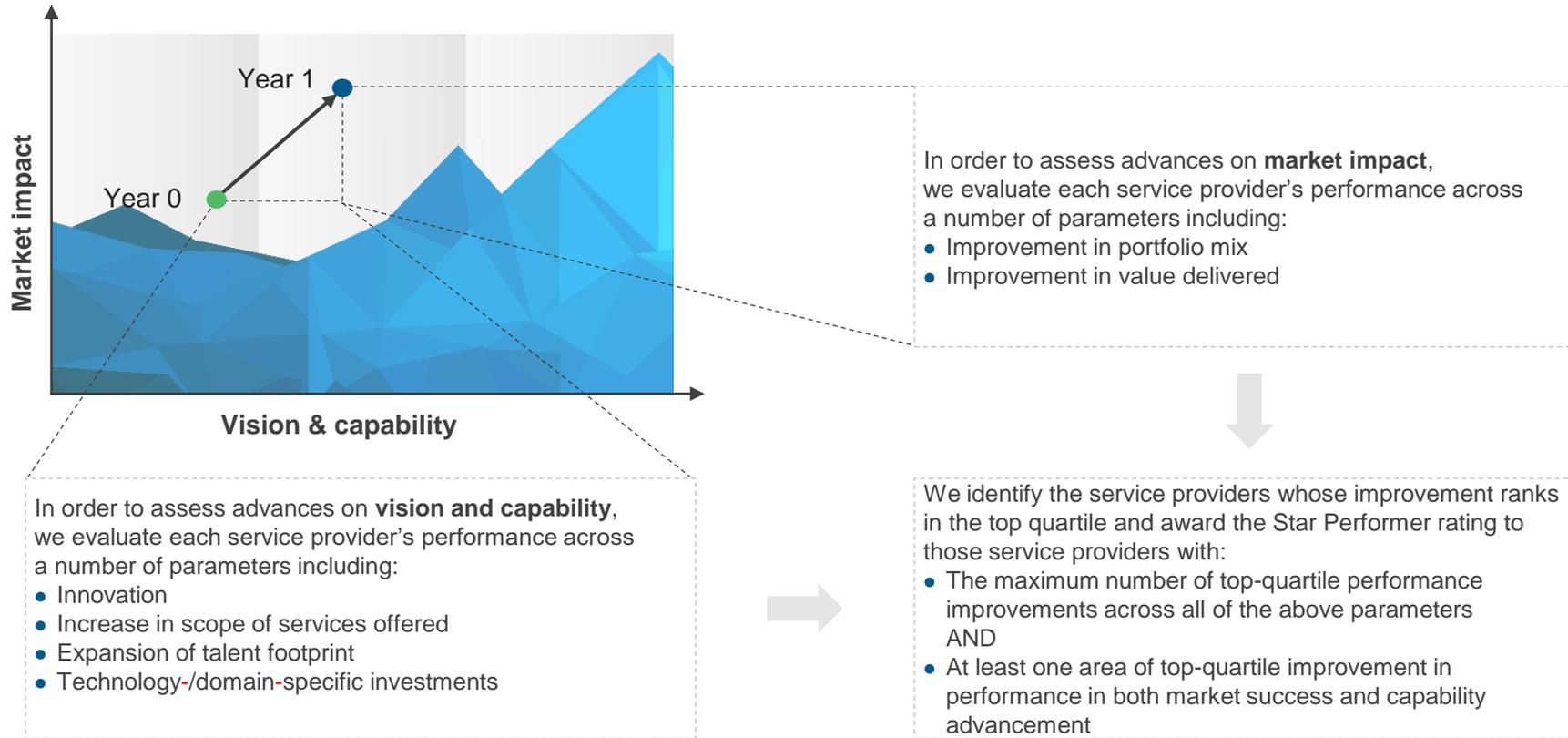
Vision & capability
Measures ability to deliver services successfully. This is captured through four subdimensions



Everest Group confers the Star Performers title on providers that demonstrate the most improvement over time on the PEAK Matrix®

Methodology

Everest Group selects Star Performers based on the relative YoY improvement on the PEAK Matrix®



The Star Performers title relates to YoY performance for a given vendor and does not reflect the overall market leadership position, which is identified as Leader, Major Contender, or Aspirant.

FAQs

Does the PEAK Matrix® assessment incorporate any subjective criteria?

Everest Group's PEAK Matrix assessment adopts an unbiased and fact-based approach (leveraging service provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information). In addition, these results are validated / fine-tuned based on our market experience, buyer interaction, and provider/vendor briefings

Is being a “Major Contender” or “Aspirant” on the PEAK Matrix, an unfavorable outcome?

No. The PEAK Matrix highlights and positions only the best-in-class service providers / technology vendors in a particular space. There are a number of providers from the broader universe that are assessed and do not make it to the PEAK Matrix at all. Therefore, being represented on the PEAK Matrix is itself a favorable recognition

What other aspects of PEAK Matrix assessment are relevant to buyers and providers besides the “PEAK Matrix position”?

A PEAK Matrix position is only one aspect of Everest Group's overall assessment. In addition to assigning a “Leader”, “Major Contender,” or “Aspirant” title, Everest Group highlights the distinctive capabilities and unique attributes of all the PEAK Matrix providers assessed in its report. The detailed metric-level assessment and associated commentary is helpful for buyers in selecting particular providers/vendors for their specific requirements. It also helps providers/vendors showcase their strengths in specific areas

What are the incentives for buyers and providers to participate/provide input to PEAK Matrix research?

- Participation incentives for buyers include a summary of key findings from the PEAK Matrix assessment
- Participation incentives for providers/vendors include adequate representation and recognition of their capabilities/success in the market place, and a copy of their own “profile” that is published by Everest Group as part of the “compendium of PEAK Matrix providers” profiles

What is the process for a service provider / technology vendor to leverage their PEAK Matrix positioning and/or “Star Performer” status ?

- Providers/vendors can use their PEAK Matrix positioning or “Star Performer” rating in multiple ways including:
 - Issue a press release declaring their positioning. See [citation policies](#)
 - Customized PEAK Matrix profile for circulation (with clients, prospects, etc.)
 - Quotes from Everest Group analysts could be disseminated to the media
 - Leverage PEAK Matrix branding across communications (e-mail signatures, marketing brochures, credential packs, client presentations, etc.)
- The provider must obtain the requisite licensing and distribution rights for the above activities through an agreement with the designated POC at Everest Group.

Does the PEAK Matrix evaluation criteria change over a period of time?

PEAK Matrix assessments are designed to serve present and future needs of the enterprises. Given the dynamic nature of the global services market and rampant disruption, the assessment criteria are realigned as and when needed to reflect the current market reality as well as serve the future expectations of enterprises



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