



# Enterprise Service Management: Making Hypercomplexity Work

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# Modern Technology Is Hyperscale, Hyperspeed, and Hyperconnected

## Hyperscale

- This type of infrastructure spans cloud providers, datacenters, and the edge, **with over 50% of new IT infrastructure** being deployed to the edge.

## Hyperspeed

- **In the next few years, 66% of enterprises** will deploy code daily, **with at least 90%** of new applications and **50% of user interfaces** having artificial intelligence (AI) embedded in the core of the system.
- **Half (50%) of IT spending** will go directly towards innovation and transformation.

## Hyperconnected

- **More than half (60%) of enterprises** support a developer ecosystem, **with over 30% driving 20% of their revenue** through their platform ecosystem.
- **An additional 20% of revenue growth** will come from digital services spanning previously unlinked industries.

IDC predicts that by 2025, IT service management will grow in two directions:

**Operations driven by AI**, managing the devices and connections between them

and

**AI-first service fulfillment and assurance**, simplifying enterprise operations

Source: IDC FutureScape, 2019

# Hyperscale

**2021**

The pressures of 2020 have forced enterprises into a “hybrid by design” model for work and infrastructure, ranging from the “branch of one” to traditional business locations.

IT service management vendors will have to accelerate both their enablement of AI-operations and AI-first service technologies to keep up.

**In 2022**

**75%**

of enterprises will deploy a unified management system for their clouds, networks, and datacenters to counter business resiliency threats from infrastructure costs and operational complexity.

**By 2024**

**55%**

of enterprises will rely on embedded-AI functions in their business-critical workloads to make real-time business decisions and directly drive business process outcomes.

Source: IDC Future of Digital Infrastructure, October 2020

# Hyperspeed

**2021**

Simple code metrics are translated into increased delivery of goods and services and real-time responsiveness.

**IT service management must evolve beyond process to integrate people, process, and technology across the enterprise autonomously in order to deliver on the goal.**

**By 2022**



of organizations that shift to a hybrid business-by-design model will boost spending on AI-enabled and secure edge infrastructure by four times to deliver business agility and insights in real time.

Source: IDC Future of Digital Infrastructure, October 2020

**By 2024**



of Global 2000 organizations will develop digital operations centers to monitor industry ecosystem capacity, expertise, market, and environmental conditions for 50% faster time to market.

Source: IDC Future of Industry Ecosystems, October 2020



# Hyperconnection

**2021**

Enterprise systems are evolving beyond developer ecosystems into ecosystems of engagement with suppliers, competitors, and across industries to deliver solutions to customers.

IT service management platforms must evolve beyond enterprise boundaries, managing bundles of services bound by contracts and monitored by AI.

**By 2023**



60% of enterprises across the industry will share information and data with cloud-based ecosystems to enhance internal operations and innovation and/or for collective monetization.

Source: IDC FutureScape: Future of Industry Ecosystems, 2021

**By 2025**



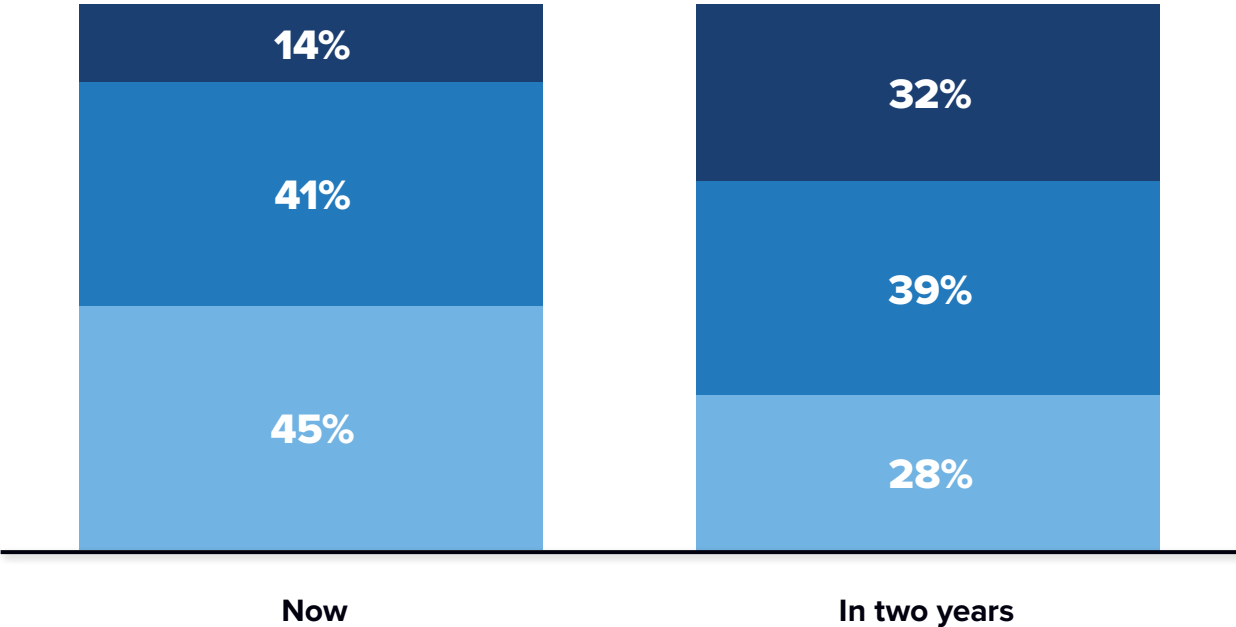
60% of enterprises will leverage AI to effectively govern contractual third-party relationships and monitor financial risks related to monetized subscription services.

Source: IDC FutureScape: Business Models, 2021

# A Radical Decentralization of Computing Resources

Computing resources will continue to shift to a highly distributed model with networking and compute vendors moving to secure their positions in this changed space.

## Location of Resources



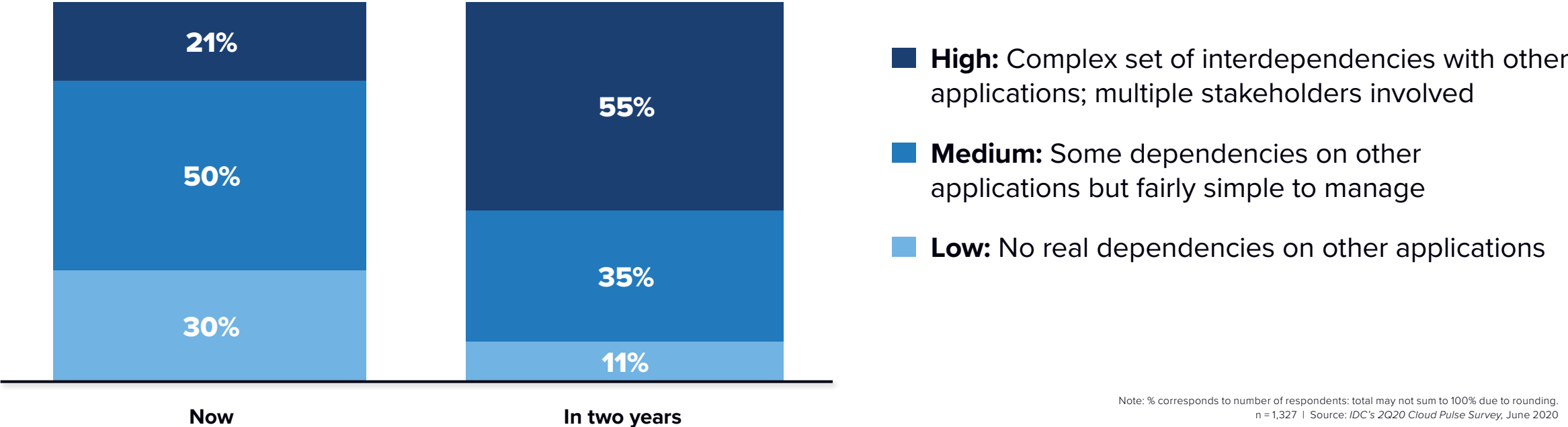
- **Edge location:** close to end users, often part of an Internet of Things (IoT) or sensor deployment
- **Remote office/branch office:** as part of a remote office or local office at your organization, usually a server room/closet
- **Centralized in datacenter:** either in your own organization’s datacenter or a third-party/service provider datacenter

Note: % corresponds to number of respondents; total may not sum to 100% due to rounding. n = 1,327 | Source: IDC’s 2Q20 Cloud Pulse Survey, June 2020

# A Radical Increase in Hyperconnection

As organizations enter the hyper-x world, the underlying technology platform becomes ever more complex. By 2022, the number of applications with a high degree of interdependency will more than double, requiring new ways of thinking and working with the data being generated and its functionality.

## Degree of Application Interdependency



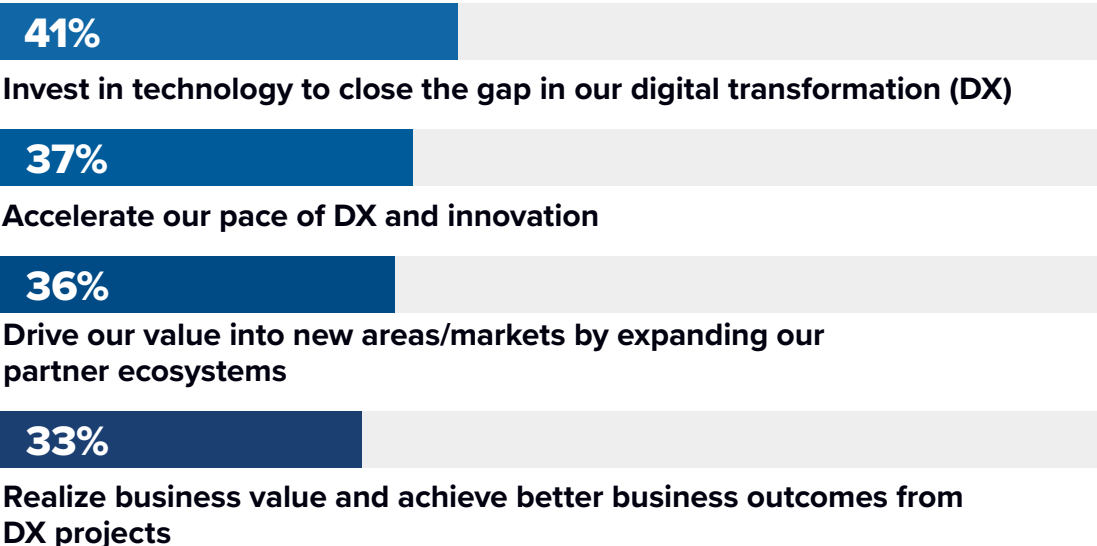
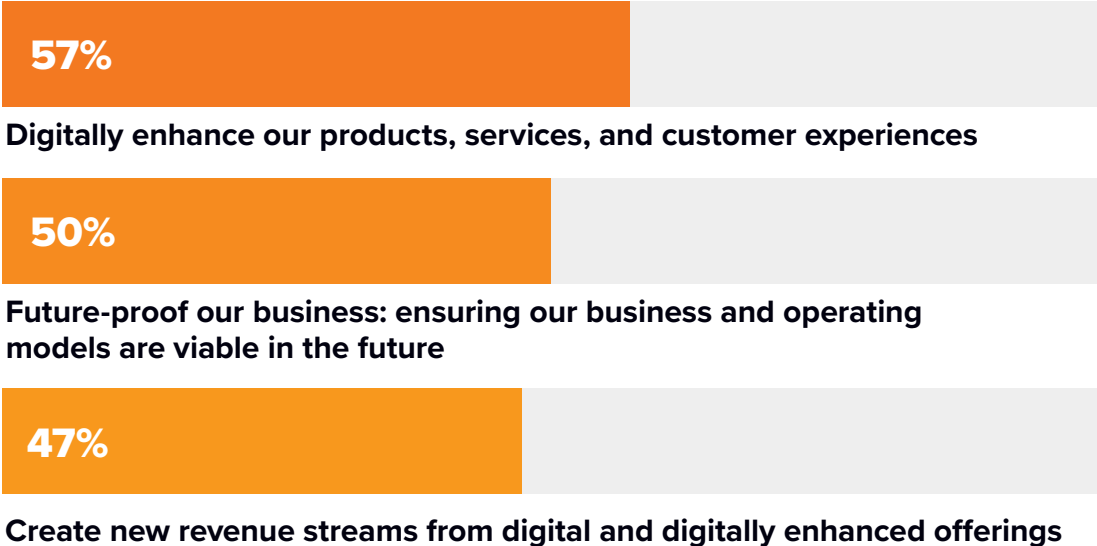


# Business Goals Rely on New Methods of Operations and Service

As we have seen, the future is now. Businesses have already aligned around:

- ✔ Digitally enhancing products, services, and customer experiences
- ✔ Future-proofing their businesses
- ✔ Creating new revenue streams from digital and digitally enhanced offerings

## What are your top goals for 2021?

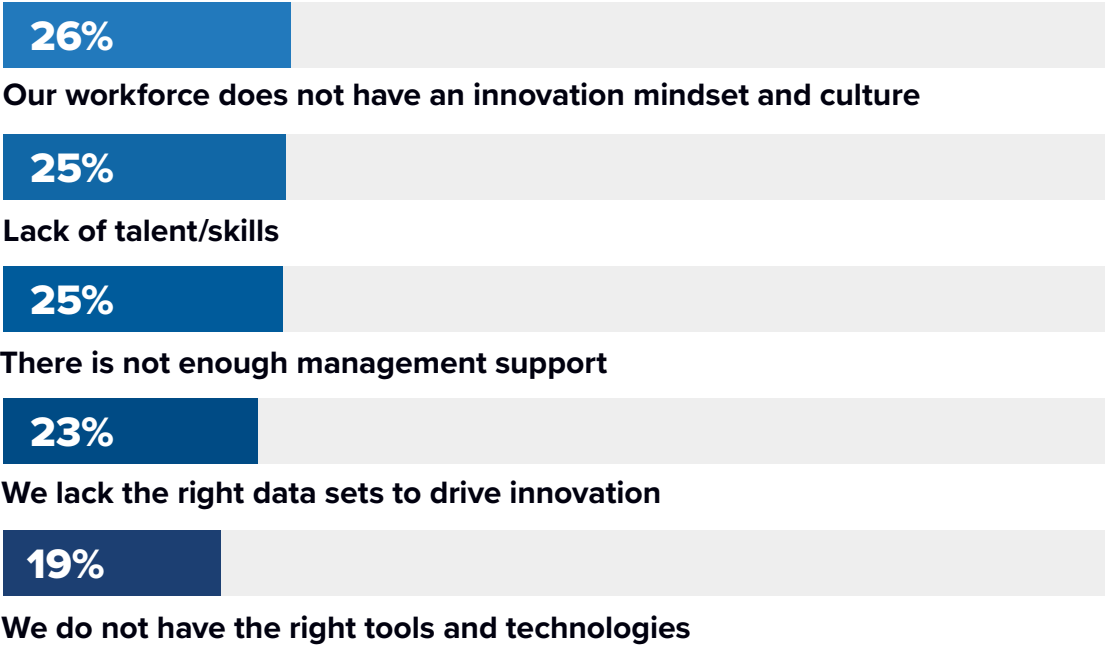


Note: % corresponds to number of respondents; multiple dichotomous table; total will not sum to 100%. Source: IDC's COVID-19 Impact on IT Spending Survey (conducted October 15 to October 30), October 2020

# The Obstacles to Digital Transformation

Unsurprisingly, people are busy, innovation is difficult to capture, and the potential for failure is intimidating.

When thinking about business resilience and future-proofing your business, which of the following are challenges your organization faces in developing innovative new products/services or business models?



Note: % corresponds to number of respondents; multiple dichotomous table; total will not sum to 100%. Source: IDC's COVID-19 Impact on IT Spending Survey (conducted October 15 to October 30), October 2020

# Enterprise Service Management's Critical Role



**AI-driven operations**, managing the devices and connections between them so that the enterprise can spend more time innovating digital products, services, and revenue streams and less time running the increasingly complex digital estate underlying the business



**AI-first service fulfillment and assurance**, using multiple channels



**Business agility and customer-centricity** in a hyperconnected, hyperscale, and hyperspeed world

# About the Analyst



## **Shannon Kalvar**

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Shannon Kalvar is research manager for IDC's IT Service Management and Client Virtualization program, responsible for delivering research and advisory for IT executives, vendor management teams, and investment executives. Shannon's research coverage includes IT service management, desktop as a service (DaaS), virtual client computing, cost transparency tools, software asset management, and the use of AI and natural language processing for service management.

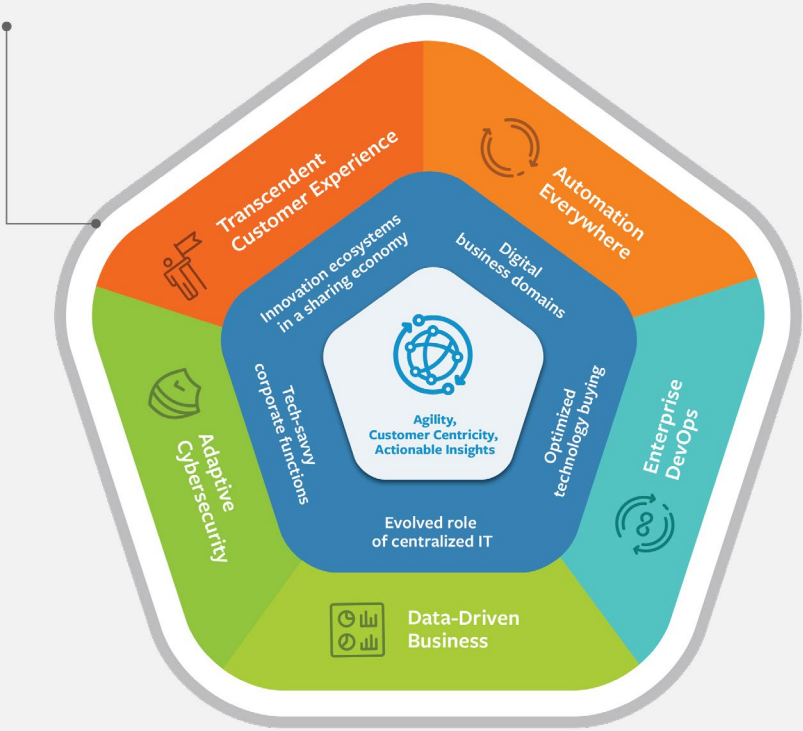
[More about Shannon Kalvar](#)

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