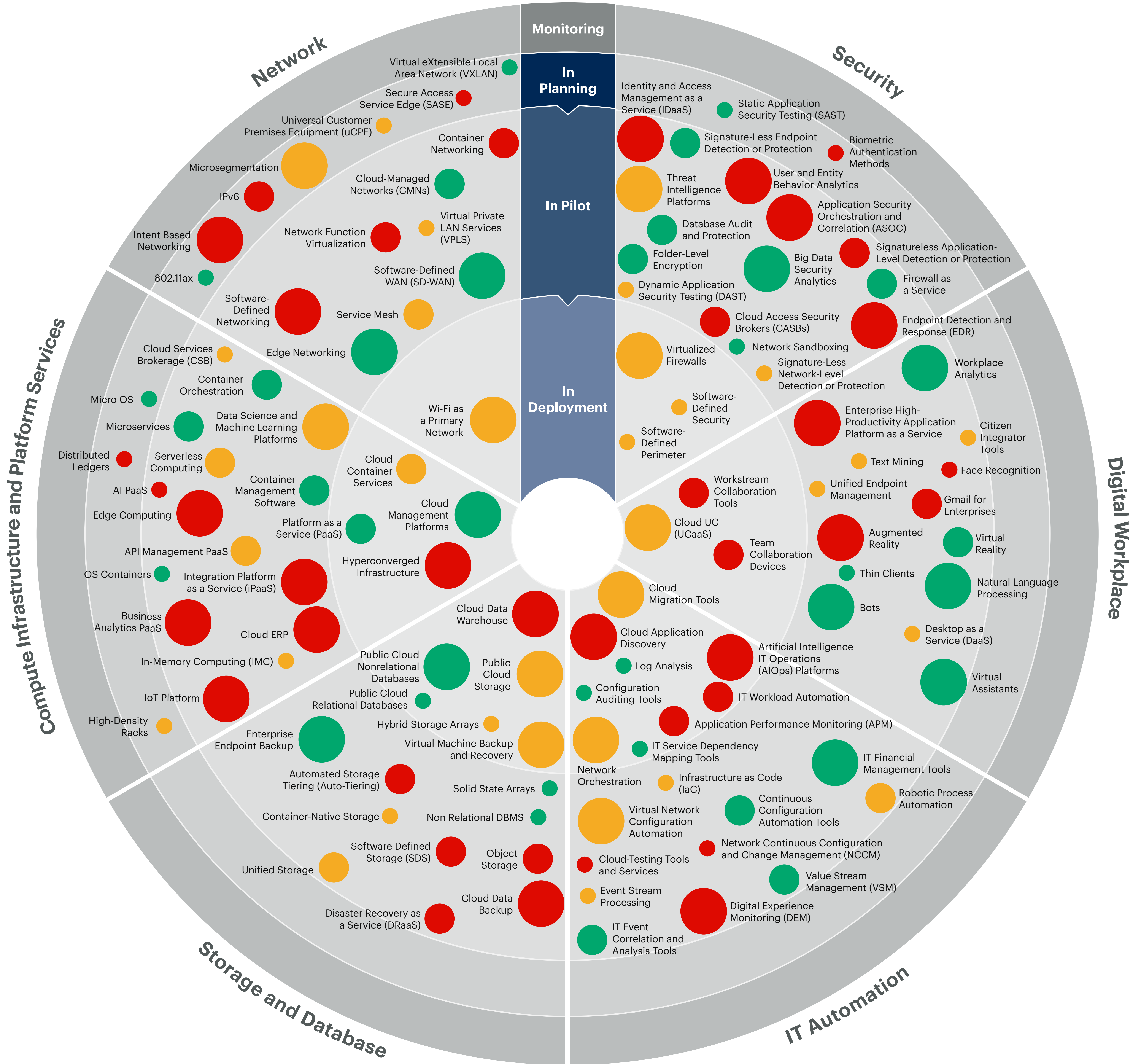


2020-2022

# Emerging Technology Roadmap for Large Enterprises

IT Professionals From 438 Organizations Collaborated to Benchmark Adoption Plans, Anticipated Value and Risk for 111 Infrastructure and Operations Technologies



**Deployment Risk**

Based on analysis of where the technology represents potential risks in marketplace/vendor maturity, architectural fit/complexity, security risk, talent availability, regulatory compliance challenges, implementation cost and disruption to existing processes and services

**Enterprise Value**

Based on analysis of where technology has the potential to increase cost efficiency, improve speed and agility, enhance employee productivity and increase revenue through improved products and/or services

## Key Takeaways

- 1. I&O organizations see a need to continue technology investments in order to support the accelerated transition to a new virtual work environment, despite delays in some technology adoption plans caused by the economic impacts of COVID-19.** Across all technology domains, 40% of I&O organizations expect to have to delay some technology investments due to COVID-19. Of the remaining 60%, 29% plan to increase investments while 21% plan to decrease investments.
- 2. The number of technologies in pilot and in deployment this year has increased, in spite of the delays in investment expected as a consequence of the economic impacts of COVID-19.** Sixty six percent of technologies on the roadmap are in pilot this year compared to 46% in 2019. Also, 23% of technologies on the roadmap are in deployment, as compared to 22% in 2019.
- 3. The importance of resiliency and reliability have increased; however, improving speed and agility remains the primary driver for technology adoption.** Two thirds of I&O leaders state that due to the current crisis, the importance of enabling resiliency and reliability will either somewhat increase or increase while making technology investments in the next 12-18 months.
- 4. Experimentation in digital workplace technologies is accelerating in order to ensure employee productivity in the post-COVID shift to remote work.** The number of digital workplace technologies on the roadmap that are in pilot have almost doubled to 82% this year as compared to 44% in 2019.
- 5. Many IT automation technologies have moved from evaluation to deployment as organizations prepare to cope with the rapid pace and scale of digital business.** In 2020, 45% of all IT automation technologies are in deployment with the remaining 55% in pilot. This is a drastic change from 2019 when 17% of IT automation technologies on the roadmap were in deployment and 72% were in pilot.
- 6. Organizations are looking to re-shape their networking infrastructure in the medium to long term to effectively support the increasing volume and variety of traffic from the cloud, edge, IoT, and a remote workforce.** 69% of all network technologies on the roadmap expect to help improve speed and agility.
- 7. Organizations are being cautious about deploying new network technologies as their short-term focus shifts to ensuring resilience.** Half of all network technologies surveyed are in pilot, and only one technology (Wi-Fi as primary network) is currently in deployment.
- 8. Organizations are actively investing in a hybrid compute environment and containers to support flexibility with multiple hosting options that align better with business needs.** Consistent multi-year investment in cloud technologies continues in 2020. Moreover, investments in hyper converged infrastructure, edge computing, and container technologies continue in parallel.
- 9. Storage and backup investments focus on supporting a hybrid environment through cloud and modernized on-premise storage.** The multi-year trend of adopting cloud-based storage and database technologies remains consistent in 2020. I&O organizations are also deploying hybrid flash arrays and piloting solid state arrays, thus modernizing existing on-premise storage solutions.
- 10. Investments in AI, Edge, and IoT have increased due to interest from the C-Suite outside IT.** Technologies such as AIPaaS, Edge Computing and IoT platforms are in pilot, and AIOps platforms are in deployment in this year's roadmap. These technologies have jumped ahead in adoption as compared to in 2019 when most of these technologies were in planning or being monitored for adoption.

Source: Gartner  
Note: Large enterprises are defined as organizations with more than \$1 billion in revenue.