

451 Research's

2022 Research Agenda

Key topics, coverage and planned deliverables



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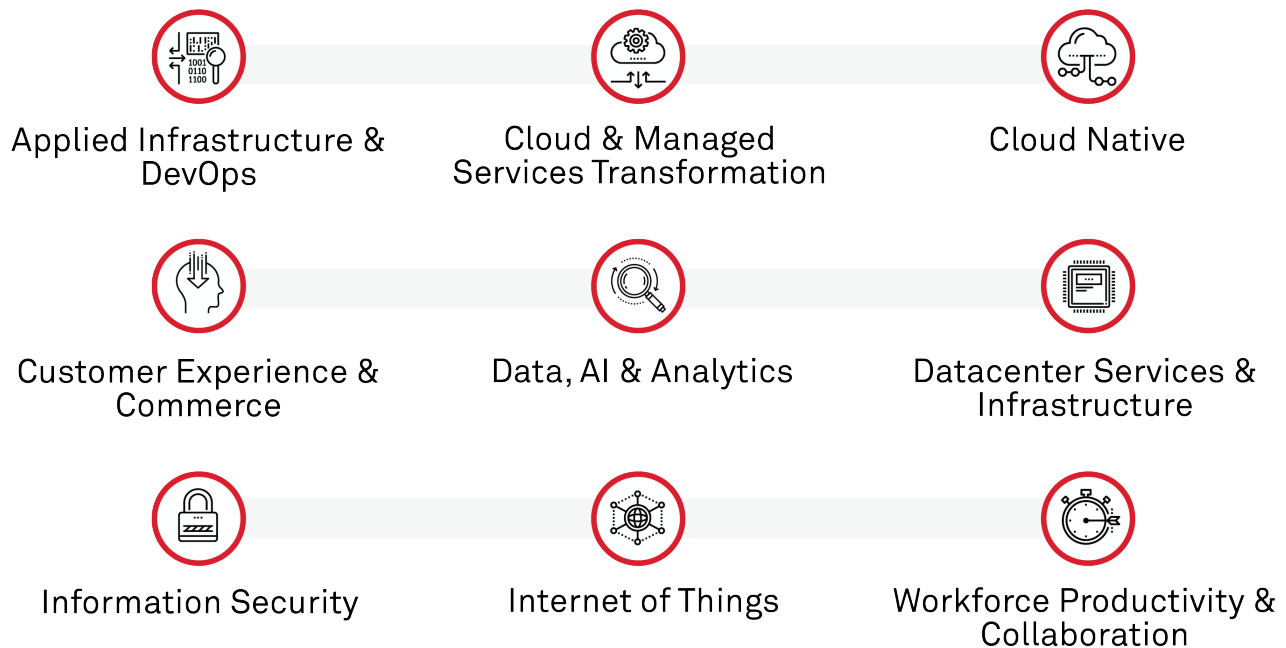
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Your radar into **market disruption, innovation and digital transformation** in the IT space.

451 Research, a technology research group within S&P Global Market Intelligence, provides a holistic view of innovation across the entire enterprise IT landscape through a combination of expert analyst insight, backed by differentiated data. Our analysts interact with key industry decision-makers every day to deliver the essential intelligence necessary to understand the pivotal role that digital transformation is playing in reshaping our world.

Our research spans nine channels that align with the prevailing issues driving IT innovation, helping clients implement, invent and invest in digital transformation. The research agenda for each channel outlines key topics, analyst coverage and planned deliverables to support our clients' critical business decisions. The pace and extent of this transformation means that many trends span multiple channels; our research approach encourages analyst collaboration both within and between channels, allowing us to surface emerging trends before anyone else. Additionally, for a higher-level perspective on the key trends that will drive digital transformation in 2022 at a strategic level, please refer to our latest [Big Picture report](#).



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Cloud & Managed Services Transformation

We are entering an era when cloud will no longer be seen as a separate IT category: quite simply, it is IT. Cloud plays a key role in enterprise IT's evolution toward the 'as a service' approach to technology delivery and consumption. The cloud operating model is taking hold, and organizations have choices for how they buy IT, where it gets deployed, how it gets integrated and managed, and how it gets used to drive the business forward. As the worlds of hardware, software, managed services, applications and distribution converge, all IT industry players are service providers now. The Cloud & Managed Services Transformation Channel tracks not only how enterprises are reinventing their IT environments but also how cloud is transforming an industry now tasked with delivering optimized IT experiences anywhere and everywhere.



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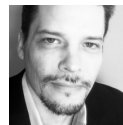
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Key Research Topics and Themes for 2022

Implementation approaches, uses cases and management strategies for multicloud/hybrid begin to take shape

As hybrid (on- and off-premises; private and public cloud) and multicloud (multiple public cloud environments) architectures become increasingly common, we will analyze why, how and where organizations are taking this approach to their IT environments and evolution of the use cases.

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'Cloud anywhere' and the convergence of on-premises private cloud, on-premises public cloud, edge, and cloud native

The cloud operating model (flexible, on-demand infrastructure managed independently of the applications on top) once applied only to public cloud. Now that the flexible deployment model is extending to on-premises, the edge and the application layer, location becomes yet another vector in enterprises' workload placement decisions.

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The evolving landscape of cloud ecosystems

While hyperscalers are positioned at the center of cloud discussions, cloud does not happen in a vacuum. Multiple entities participate in the emerging 'cloudverse' – in cloud marketplaces as buyers, sellers and enablers; through technology, solution development and go-to-market partnerships; and as integrators offering advisory, implementation and optimization services. The balance of power and competitive dynamics of cloud ecosystems are changing, and we will explore this evolution in 2022.

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Outcome-oriented approaches to observability

IT practitioners enjoy a wealth of options for monitoring infrastructure and applications, but tight integration between tools and within software development lifecycles is vital to delivering actionable value, rather than simply projecting metrics, traces and logs on a pane of glass.

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From cloud management to control planes

The cloud management market keeps evolving – with waves of innovation and consolidation – as requirements for building, operating, securing and optimizing workloads 'here, there and everywhere' expand exponentially with the advent of cloud-native and multicloud. Cloud providers, systems vendors and ISVs are trying to solve this resulting complexity in the hope of winning the ultimate prize: hosting the management plane that enables visibility and control of distributed applications across heterogeneous environments.

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Managed and professional services assume a key role in the execution of enterprise cloud strategies

As a hybrid, multicloud mix of venues and vendors becomes a common enterprise cloud strategy, and as cloud service portfolios continue to expand, service providers offering managed and professional services for public cloud work to position themselves as key partners for organizations looking to overcome complexity and execute on business and IT outcomes.

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The next wave: app modernization in the enterprise

Updating application architectures to take advantage of cloud services, reduce costs and increase adaptability has become a competitive necessity. Many enterprises have already picked the low-hanging fruit of cloud transformation – the easy wins in terms of ROI. The next phase – decomposing big, gnarly legacy applications by carving away functional blocks that can be maintained independently – is tougher. This won't be easy or straightforward, but vendors and ISVs are tackling the challenge with modern techniques that promise to reduce the toil and speed ROI.

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Pricing model evolution: shift to 'as a service' brings new billing methods

Hardware vendors and service providers are implementing usage-based billing to better compete with the pay-as-you-go cost-efficiency of public cloud service offers. Meanwhile, as cloud deployments grow, customers are struggling to keep costs under control and take advantage of commitment discounts without leaving resources on the table.

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Enterprise utility and readiness for a quantum computing future

Quantum computers are expected to exponentially speed up certain classes of workloads. Identifying business problems suitable for quantum computers and devising algorithms to convey those problems as quantum hardware develops is essential to extract value from this emerging technology, as is scoping out potential security implications of a quantum future.

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Will cloud suppliers win the edge?

The edge computing market has been born out of necessity and a healthy degree of speculation of demand to come. Many actors are competing for a central role in this new edge application stack and there are no clear winners yet – so what is the opportunity for the cloud suppliers? There are key questions left to be answered around core technologies, standards, business models and ROI.

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Alternative cloud infrastructure vendors and their evolving prospects in a market dominated by a handful of hyperscalers

Roughly a quarter of the public cloud infrastructure market is made up of a longer tail of dozens of smaller companies (such as smaller cloud infrastructure companies, former hosting companies, and adjacent businesses with cloud offerings). These tend to provide a core subset of the total hyperscaler capabilities with an emphasis on simplicity, ease of use, and lower cost.

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Verticalization and the rise of industry-led approaches to cloud transformation

Cloud is a priority for organizations across industry segments, but how enterprises approach transformation and handle roadblocks around governance, compliance, security and customer experience are unique according to sector. Hyperscalers, ISVs and other service providers play a key role in bringing enterprises in financial services, healthcare, retail, supply chain and manufacturing along a transformation journey that elevates how they serve customers, both internal and external, while ensuring regulatory compliance and data privacy.

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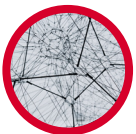
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Our analysts engage directly with IT industry leaders to **understand current market dynamics.**



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Analysis of new developments in a market sector or technology area that builds on previously published analysis to provide context and real-time updates on innovation and disruption as it happens.

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