IDC MarketScape

IDC MarketScape: Worldwide Private and Hybrid Cloud Management with Automation 2026 Vendor Assessment

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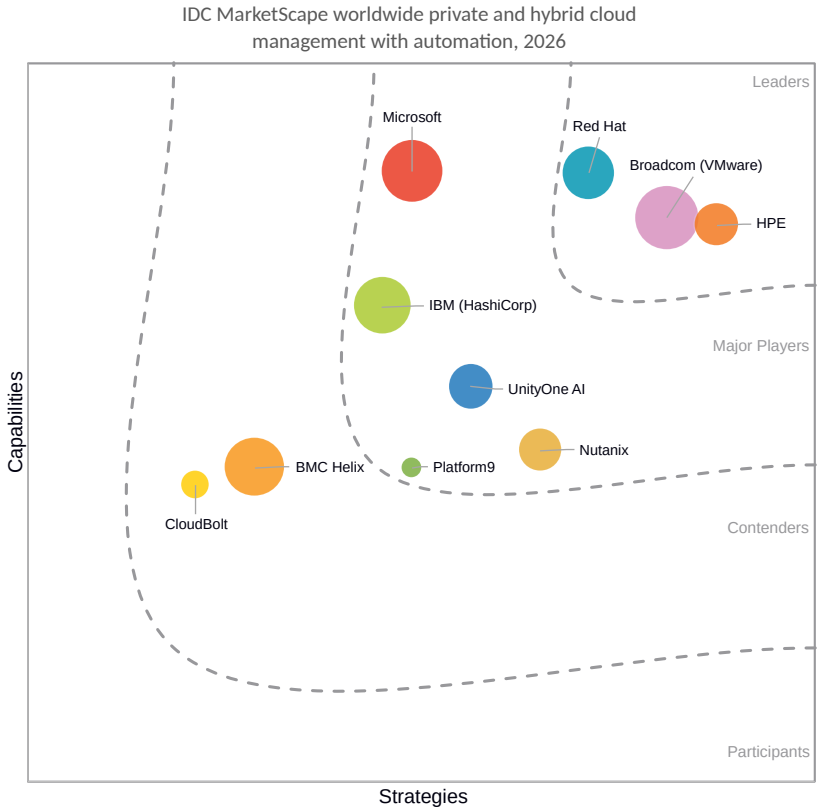
THIS EXCERPT FEATURES HPE AS A LEADER
IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape worldwide private and hybrid cloud management with automation vendor assessment



Source: IDC, 2026

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Please see the Appendix for detailed methodology, market definition, and scoring criteria.

ABOUT THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: IDC MarketScape: Worldwide Private and Hybrid Cloud Management with Automation 2026 Vendor Assessment (Doc # US54644626).

IDC OPINION

The intelligent CloudOps market is a broader software market that includes private and hybrid cloud management with automation. This submarket is the solution covered in this IDC MarketScape. According to an IDC survey conducted in 4Q25, 88.8% of large organizations still run production workloads on premises. In fact, 46% of all production workloads are still on premises. Companies continue to invest in their private cloud, with 70% planning a 10%+ increase in 2026. The market share of the largest vendors in this space continues to increase. With the healthy growth of this submarket and IDC's finding that enterprises often have multiple IT automation and management solutions, there are opportunities for future growth and tool consolidation in this space.

IT teams, including CloudOps, site reliability engineers (SREs), and cloud centers of enablement, increasingly depend on advanced tools to deliver business value. Executives of today are pushing teams to deploy AI and agentic AI at an accelerating pace. These teams still need to maintain resilient day 2 operations and achieve quick incident resolution times. Today's IT automation solutions aim to reduce complexity, increase IT staff productivity, and improve staff work-life balance by adopting a platform approach to private cloud management.

This study evaluates vendors offering private and hybrid cloud management with automation platforms. Key features, capabilities, and strategies of these vendors and their products were analyzed, considering several new trends and requirements emerging in the market. These include:

- **Support for private cloud and edge:** A hybrid cloud is a nearly ubiquitous architecture, and what was once considered a transitional approach has become the standard as companies continue to run production on their private cloud. Edge is a rapidly growing area for new applications and workloads. By default, edge is not in the public cloud or private datacenter. It lacks local IT staff or support, so remote management and automation are essential.
- **AI capabilities:** While generative AI (GenAI) has received considerable attention, many cloud management and IT automation solutions have added machine learning

(ML) and AI to their products for years. These capabilities help reduce the noise in alerts and logs while proactively finding trends and moving workloads. Companies need to prepare for the deployment of agentic AI and ongoing support today. Maintaining cost-effective, high-performance AI infrastructure is becoming mission critical.

- **Third-party integration:** Support for other tools is critical. FinOps cloud cost tools are sold separately by vendors or via external integrations with other products. Observability is another key integration that helps identify and resolve day 2 issues quickly through automation. Most vendors in this study offered integration with ITSM solutions that enable incidents to be opened, tracked, and resolved automatically, including CMDB connectivity.
- **Infrastructure as code (IaC):** CloudOps teams need an IaC solution to deploy new resources and apply configuration changes, enabling full participation in the DevOps process. By including CloudOps teams in CI/CD pipelines, version control, and Git repositories, enterprises can truly modernize their IT operations.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

IDC invited vendors to participate in this assessment based on the following key criteria:

- The vendor has a cloud management platform and supports private, edge, and hybrid cloud architecture.
- The vendor must offer true worldwide support, including all major regions and languages for customer support and sales.
- IT private cloud automation was also essential, including infrastructure as code and day 2 support, to enable CloudOps, DevOps, and SRE teams to support the digital enterprise.
- This IDC MarketScape did not include specific cloud cost (FinOps) solutions or application observability capabilities. However, more weight was given if a vendor's solution included or integrated with either of these capabilities, as this shows a more comprehensive and useful solution for enterprises.
- The vendor's estimated private cloud software product revenue must be greater than $50 million for CY25 in the intelligent CloudOps market as estimated in March 2026. Some vendors bundle hardware with software subscriptions. However, only software revenue that IDC could identify was included, which may have reduced the bubble size of some vendors that otherwise report higher revenue in this area.

ADVICE FOR TECHNOLOGY BUYERS

Buyers of private and hybrid cloud management with automation software should look for the following attributes, capabilities, and relevant use case scenario support from vendors under consideration:

- **Support for private cloud infrastructure:** Vendors must support an enterprise's on-premises cloud infrastructure to compete in this space. This includes both software, such as virtualization and infrastructure as code, and hardware, such as storage, networking, and computing. Nearly every enterprise IDC speaks to is in a hybrid cloud architecture. A single tool for provisioning, automating, and managing all private cloud resources will significantly reduce the complexity that many IT organizations face.
- **Enabled for the future with AI:** GenAI and machine learning capabilities in private cloud management and automation are not new to many vendors in this space. The ones without them are rapidly adding them. Generative AI and agentic AI are attracting significant media attention. AI plays a critical, unseen role in improving the efficiency of CloudOps and SRE teams by detecting anomalies more quickly and weeding out false positives. Generative AI can also streamline provisioning and reporting on private cloud resources. A more critical use case for GenAI is to accelerate the development of IT automation and infrastructure as code by predicting multiple lines of code or suggesting parameters based on the customer's environment. This GenAI assistance lowers the barrier to entry, enabling more IT staff members to create new automation code.
- **Ensuring edge isn't overlooked:** The edge is an important use case as companies add new applications and workloads to their company-owned locations outside the datacenter. The edge is a key growth area for many enterprises. With limited or no IT support in these areas, a central tool for managing and provisioning these workloads is essential to maintain resiliency. IDC believes edge workload growth will outpace growth in private datacenters and public clouds over the next few years.
- **Platform approach:** IDC believes a comprehensive tool is one that integrates all the elements needed to manage and automate private cloud resources, benefiting enterprises. The best-of-breed approach can often increase training, maintenance, and staffing costs. In a time of difficult geopolitical conditions and inflation, tool consolidation can be a winning strategy for controlling costs. Over the past few years, cloud management and automation tools have gained essential capabilities, thus reducing the need for multiple tools. This change has reduced the need for a best-of-breed approach. Companies already have numerous IT automation tools, so a separate cloud management and monitoring tool can be cumbersome.

- **Easy and frequent integration:** While IDC recommends a platform approach to cloud automation, integration with other applications remains essential. ITSM, observability, and FinOps are examples where tight integration is necessary for a private cloud management and automation solution. These established tools can benefit from automation and shared visibility. Look for adjacencies and tie-ins to a strong portfolio of complementary infrastructure software products. Other vital integrations include identity, cloud access security brokers (CASBs), security information and event management (SIEM), network security, and line-of-business/vertical-specific application platforms. These integrations include both on-premises and external SaaS partners. Since the software does not operate in a vacuum, vendors must go to market with complementary IT software product portfolios or robust integrations and partnerships with key industry players.
- **Automation everywhere:** A comprehensive IT cloud automation solution must support a wide range of third-party infrastructure hardware and software. IT teams should aggressively promote automation across private datacenters and edge locations. Many vendors offer curated support for automating multiple infrastructure elements, such as firewalls, load balancers, VPNs, LAN, and WAN switches, and virtual server provisioning. Drift monitoring and resolution, as well as workload placement, are other areas where IT should focus its automation efforts.
- **Infrastructure as code:** The growth of IaC by IT teams means vendors need to either provide this capability or partner with a major IaC company. The ability of CloudOps or SRE teams to fully participate in the DevOps CI/CD process, including version control in a Git-style repository, improves their effectiveness. Many enterprises desire a standard platform to manage and automate IaC-enabled private cloud resources. Policy as code is a rapidly evolving space that extends the benefits of IaC to create guardrails and controls in a similar manner.
- **Sound strategy and finances:** Enterprises need a clear road map and a strong product strategy to invest time and money in a new platform. IDC reviewed strategic plans for each vendor's key private and hybrid cloud management with automation areas. Enterprises also want to ensure that their vendor has the financial resources to partner long term.

VENDOR SUMMARY PROFILES

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

HPE

HPE is positioned in the Leaders category in this 2026 IDC MarketScape for worldwide private and hybrid cloud management with automation.

Hewlett Packard Enterprise (HPE) continues to invest in its GreenLake platform, positioning it as a hybrid/private cloud solution delivered on a consumption-based model for both hardware and software. Since its introduction, GreenLake has evolved into a comprehensive platform that enables enterprises to operate cloudlike environments within their own datacenters or colocation facilities. Many enterprises still require full control over their infrastructure and data, which GreenLake provides. HPE's strategy focuses on simplifying private cloud operations for these customers while delivering flexibility, scalability, and cost transparency comparable with public cloud models. HPE's acquisitions over the past 24 months have added new software and IT operations capabilities that were previously missing.

GreenLake integrates infrastructure, automation, and operational tooling into a unified platform that provides centralized control over private cloud environments. The platform supports a broad range of workloads, including virtual machines, containers, and AI data-intensive applications. In fact, HPE offers a full-stack turnkey Private Cloud AI (PCAI) solution. Its consumption-based model allows organizations to modernize infrastructure without large up-front capital investments, aligning with enterprise preferences for financial flexibility. Additional value is offered through HPE Morpheus VM Essentials (VME) tier of solutions that provides enterprises a simpler transition to HPE's virtualization offer.

The integration of HPE's OpsRamp acquisition has added day 2 operational capabilities. OpsRamp delivers unified observability, AIOps, and event-driven automation across infrastructure and applications residing on HPE or multivendor platforms. These capabilities allow enterprises to monitor performance, detect anomalies, and automate remediation workflows, which are critical for maintaining reliability in private cloud environments where operational responsibility remains internal. HPE's purchase of Morpheus brings new public and private cloud automation, with easier day 1 provisioning, regardless of where the workload runs. Finally, data protection and disaster recovery for mission-critical workloads are covered in HPE's Zerto product.

HPE also emphasizes support for edge, air-gapped, and distributed environments, where private cloud deployments are increasingly required. By enabling consistent management across centralized datacenters and edge locations, HPE addresses use cases that require high latency tolerance, data sovereignty, and regulatory compliance. In addition, GreenLake Intelligence adds AI agents trained to perform specific IT operations tasks efficiently and safely. This capability can reduce toil on existing teams and proactively support business uptime goals.

Strengths

HPE's ability to deliver turnkey private cloud as a service is a key strength. The consumption-based model provides financial flexibility while enabling enterprises to maintain control over infrastructure, making it particularly attractive for organizations balancing costs with regulatory and sovereignty requirements. Companies wishing to capitalize equipment may choose that option, giving multiple financial options to enterprises.

Improvements to GreenLake's software capabilities (OpsRamp and Morpheus) enhance operational visibility and automation by enabling proactive management of private and hybrid cloud environments. This reduces operational overhead and improves service reliability.

HPE's global reach and extensive partner ecosystem further strengthen the company's ability to deliver tailored solutions across industries and deployment scenarios.

Challenges

GreenLake's pricing model may be perceived as premium compared with traditional "do it yourself" infrastructure purchasing if companies are willing to accept a multivendor solution.

Some automation capabilities rely on third-party integrations, especially infrastructure as code, which may introduce additional complexity for organizations seeking fully native solutions.

Enterprises must also retain internal expertise for security, governance, and data management, as GreenLake is not a fully outsourced managed service. Professional services are available but not as a standard, fixed price turnkey offering.

Consider HPE when

Organizations seeking a flexible, consumption-based or commit-based private cloud platform with strong operational capabilities on dedicated hardware from a well-established company should consider HPE GreenLake. Other organizations looking for a CAPEX model can still leverage HPE, since that is one of the options HPE offers, while benefiting from cloud-style capabilities on premises. Enterprises operating hybrid or edge environments that require consistent management, observability, and automation should review HPE's offers. GreenLake may be attractive to companies needing to modernize on-premises infrastructure while remaining in a hybrid architecture.

APPENDIX

Reading an IDC MarketScape graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

IDC MarketScape methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market definition

Private and hybrid cloud management with automation is a technology submarket category of the intelligent CloudOps functional market. Software products in this submarket combine to enable enterprises to manage any cloud resource, provision new resources, and automate IT operations tasks, all within a single software platform. By definition, these solutions must support a customer's on-premises private clouds and infrastructure-related resources. The edge is a growing area of investments and new workloads, so this capability was also included. Vendors may bundle cloud management or automation software with hardware or infrastructure-as-a-service subscription. IDC breaks out and only includes

software revenue for this IDC MarketScape when reviewing these elements. Observability and cloud cost optimization products are important aspects that integrate with private and hybrid cloud management with automation platforms but are not required to be included as they are part of separate IDC MarketScape documents.

LEARN MORE

Related research

- *IDC's Worldwide Intelligent Cloud and Edge Operations with FinOps Taxonomy, 2026* (IDC #US54298226, February 2026)
- *Enterprise Continue to Leverage Both Private and Public Cloud as Data Grows* (IDC #US54233326, January 2026)
- *Market Analysis Perspective: Worldwide Intelligent Cloud and Edge Operations with FinOps, 2025* (IDC #US52809125, October 2025)
- *Worldwide Intelligent Cloud and Edge Operations with FinOps Software Market Shares, 2024: Faster Growth Continues* (IDC #US53688325, July 2025)

Synopsis

This IDC study represents a vendor assessment of the private and hybrid cloud management with automation software market through the IDC MarketScape model.

Enterprises are pushing CloudOps and SRE teams to improve resiliency while rapidly deploying GenAI and agentic AI–ready infrastructure. The private cloud continues to be used for both new and existing workloads.

"A platform approach to private cloud management, monitoring, and automation enables IT teams to more efficiently and effectively support these complex AI environments," says Jevin Jensen, research VP, Infrastructure and Operations, IDC. "Standardizing and consolidating multiple IT automation solutions reduce training and maintenance costs while increasing the adoption of automation, which improves resiliency that the business demands."

ABOUT IDC

International Data Corporation (IDC) is the premier global market intelligence, data, and events provider for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries. IDC's analysis and insight help IT professionals, business executives, and the investment community make fact-based technology decisions and achieve their key business objectives.

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