# ALCATEL-LUCENT 2011
# GLOBAL CLOUD ITDM STUDY
## GLOBAL ANALYSIS

For more information please contact: cloud-consulting@alcatel-lucent.com

Alcatel·Lucent

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# AGENDA

1. Methodology
2. The Current Cloud Landscape:
   Usage, Market Share and Pain Points
3. Attitudes and Perspective
4. Providing Cloud Solutions: The Brand Story
5. US Market Projections
6. Conclusions
7. Appendix


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# METHODOLOGY

Penn, Schoen and Berland Associates, LLC, conducted online interviews among 3,886 information technology decision makers (ITDMs) in the United States, United Kingdom, France, India, South Korea, Taiwan, and Hong Kong.

ITDMs must be in an organization with at least 100 employees, be at least a contributor to both enterprise and departmental IT decisions, as well as having budget authority. They were also required to be at least somewhat familiar with cloud, and have an active role in the cloud purchasing or implementation process.

Surveyed from June 16th to September 14th, 2011

Margin of error = +/- 1.57 at a 95% confidence level and higher for subgroups


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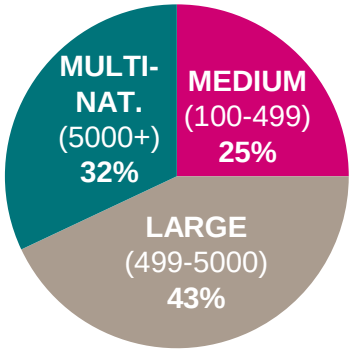
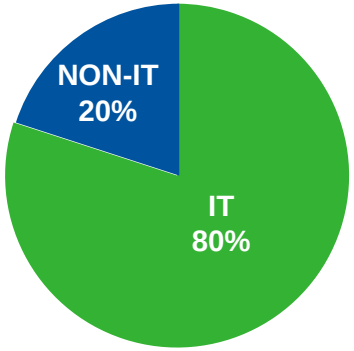
# DEMOGRAPHIC COMPOSITION:
## TITLES, ORGANIZATION SIZE, AND EXPERTISE

### COMPANY SIZES




| INDUSTRIES | % |
|---|---|
| Manufacturing, Defense, etc. | 17 |
| Service Industries | 16 |
| Professional services | 15 |
| Government and Education | 14 |
| Technology | 14 |
| Finance and insurance | 13 |
| Healthcare | 8 |

| JOB TITLE | % |
|---|---|
| C-level officers | 16 |
| Senior VP, Executive VP, VP or equivalent | 11 |
| Managing Director, Director or equivalent | 30 |
| Senior Manager, Manager or equivalent | 43 |

| BUDGET AUTHORITY | % |
|---|---|
| For the entire company or organization | 41 |
| Within a department or division | 49 |
| Within a team or group | 10 |

| CLOUD COMPUTING TECHNOLOGY FAMILIARITY | % |
|---|---|
| Very familiar | 53 |
| Somewhat familiar | 47 |

**IT BUDGETS RANGED FROM LESS THAN $50,000 TO GREATER THAN $5 MILLION, WITH A MEDIAN BUDGET OF $375,000**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# METHODOLOGY:
# THE ITDM RESPONDENT SELECTION PROCESS

- In order to qualify for the cloud study, respondents needed to meet the following criteria:
  - Describe themselves as at least **familiar** with cloud computing
  - Work for an organization with **at least 100 employees** and **at least 10 IT employees**
  - Be of **manager authority** level or higher
  - At least **contribute** to enterprise wide IT platform and **technology purchasing decisions**
  - Hold **budget authority** for at least a team or group
  - Play some **role in potential cloud** solution purchasing **decisions**
- Due to the careful respondent selection process, the data across the globe should be viewed as being reflective of the cloud-familiar community and not necessarily the entire broader economy.
- Levels of unfamiliarity with cloud computing technology varied by country as follows:

| | FAMILIARITY WITH CLOUD COMPUTING TECHNOLOGY | US | UK | FRANCE | INDIA | TAIWAN | HONG KONG | KOREA |
|---|---|---|---|---|---|---|---|---|
| | Very familiar | 50% | 31% | 19% | 40% | 25% | 46% | 14% |
| | Somewhat familiar | 19% | 33% | 31% | 44% | 40% | 40% | 42% |
| Screened out of study | Somewhat unfamiliar | 12% | 17% | 32% | 11% | 26% | 16% | 35% |
| Screened out of study | Not at all familiar | 19% | 19% | 18% | 15% | 9% | 8% | 21% |
| | **Total % stopped on familiarity screener** | **31%** | **36%** | **50%** | **26%** | **35%** | **24%** | **56%** |


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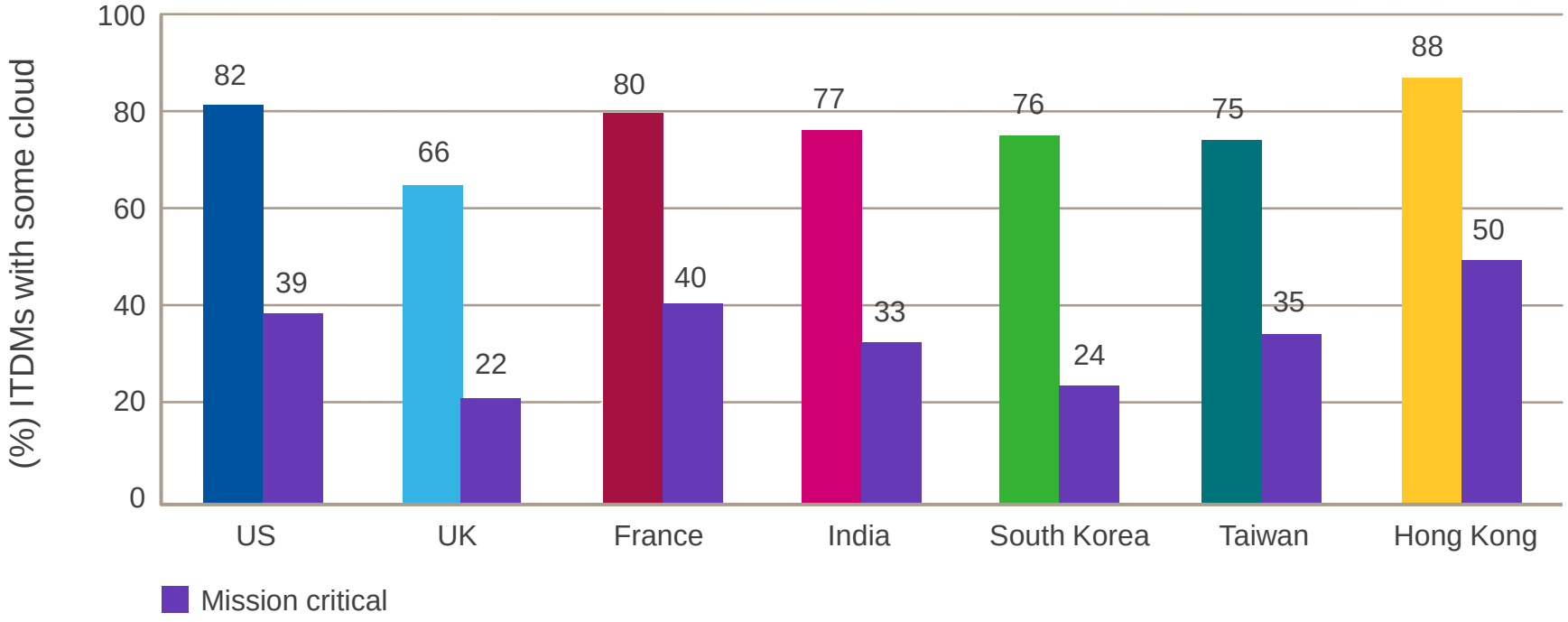
# CLOUD ADOPTION IS ROBUST ACROSS MAJOR MARKETS, BUT THE MIGRATION OF MISSION-CRITICAL APPLICATIONS TO THE CLOUD VARIES MEANINGFULLY

Hong Kong shows the highest levels of moving their most valued applications to the cloud; the UK shows the greatest reticence





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# AROUND THE WORLD, CLOUD ADOPTION LEVELS DEPEND LARGELY ON INDUSTRY SECTOR

While **Technology, Professional services**, and **Manufacturing** sectors largely reach the top of the list, the **Government and Education** sector was lowest in every country studied

## THE TOP 3 INDUSTRIES IN CLOUD ADOPTION

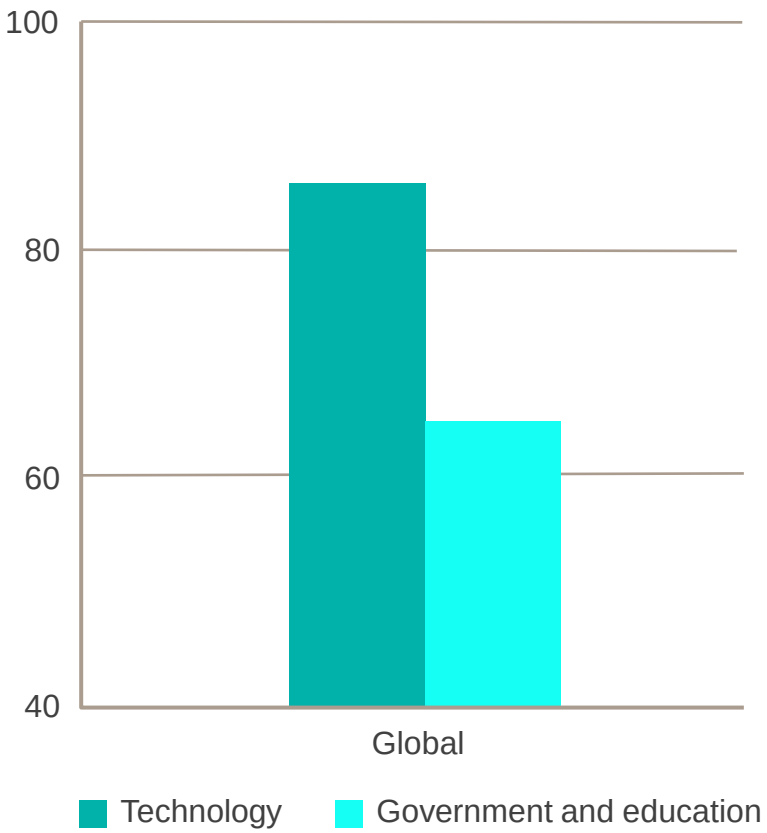
**Globally:** Technology, Professional services, and Manufacturing*

**US:** Technology, Service industries, and Manufacturing

**UK:** Technology, Professional services, and Manufacturing

**France:** Professional services, Finance and insurance, and Healthcare

**Asia:** Technology, Professional services, and Service industries




* The Manufacturing industry includes Manufacturing, Defense, Food production Pharma/Biotech, and Consumer Goods



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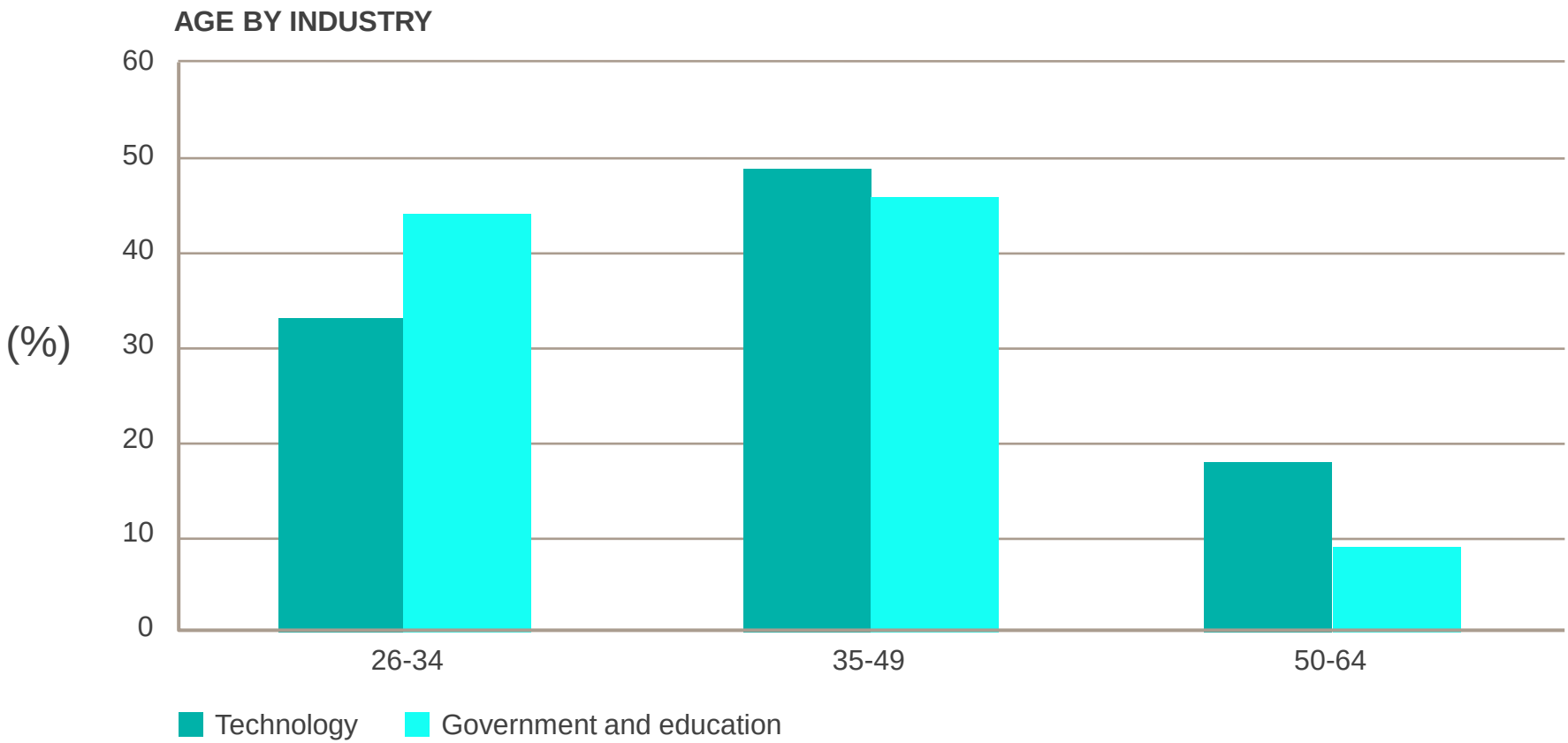
# TECH FIRM ITDMs ARE YOUNGER THAN THEIR COUNTERPARTS IN GOVERNMENT AND EDUCATION

This could be a factor in the Technology sector's high level of cloud adoption relative to Government and Education





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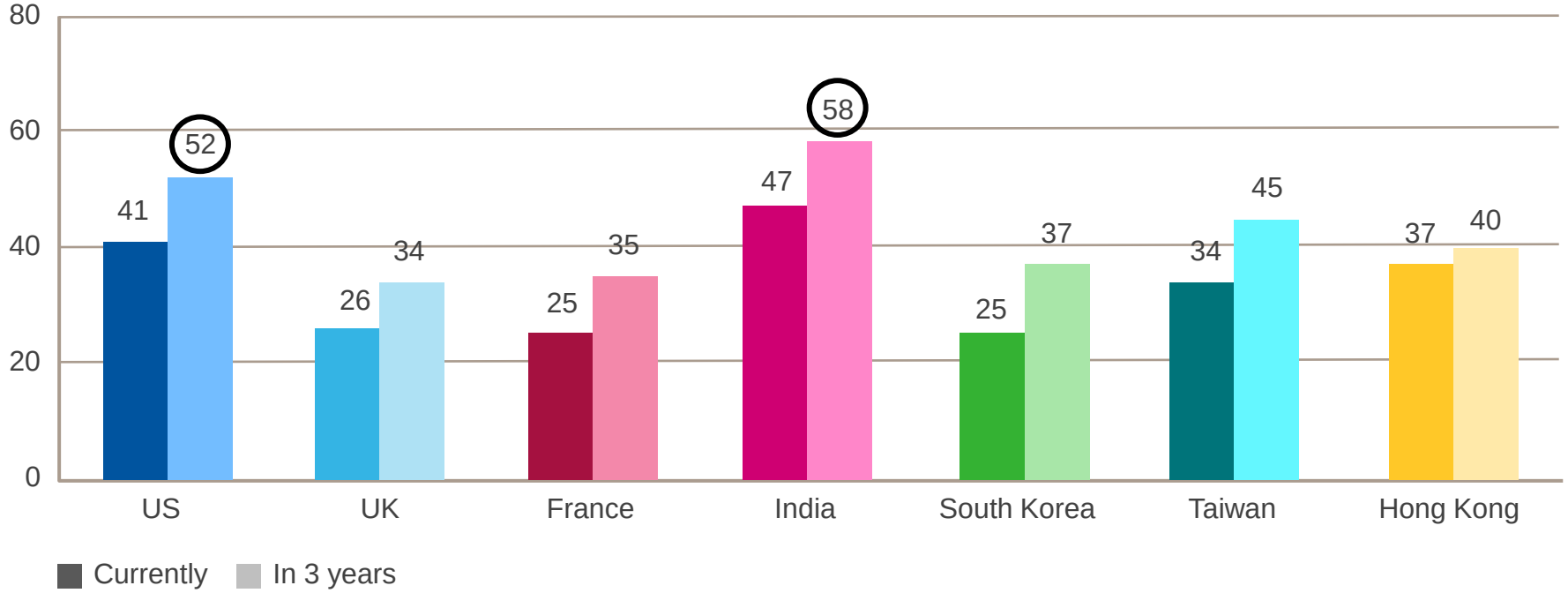
# US AND INDIA LEAD IN EXTENSIVE USE OF EXTERNAL SOLUTIONS AND THIS TREND IS EXPECTED TO CONTINUE INTO THE NEAR FUTURE

India is already the leader in external cloud and expects to expand its cloud use even further; France and UK show least enthusiasm

**QTEXT:** HOW WOULD YOU DESCRIBE YOUR CLOUD-BASED ARCHITECTURE?

**QTEXT:** HOW WILL YOU MAKE USE OF THE CLOUD **THREE YEARS** FROM NOW?

**% WHO WILL MAKE EXTENSIVE USE OF EXTERNAL CLOUD SOLUTIONS**



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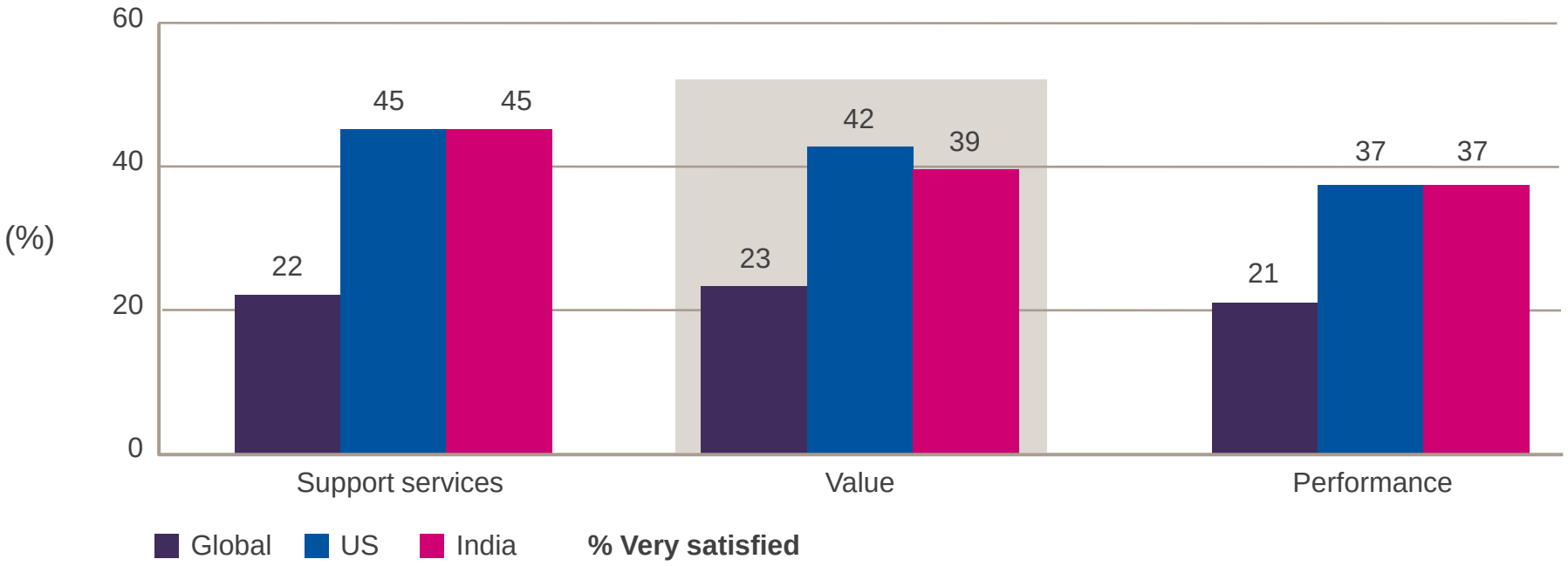
# WHILE ITDM SATISFACTION WITH CLOUD PROVIDERS IS GENERALLY HIGH, THE US AND INDIA ARE ESPECIALLY PLEASED WITH THEIR SERVICE

The US and India show ITDMs who are far more “very satisfied” than the global average

**QTEXT**: HOW SATISFIED ARE YOU WITH THE SUPPORT SERVICES YOU GET FROM YOUR CLOUD PROVIDER?
**QTEXT:** HOW SATISFIED ARE YOU WITH THE VALUE YOU GET FROM YOUR CLOUD SOLUTION CONSIDERING THE PRICE YOU PAY?
**QTEXT:** HOW SATISFIED ARE YOU WITH YOUR CLOUD SOLUTION’S PERFORMANCE?




*Rest of Global figures exclude US and India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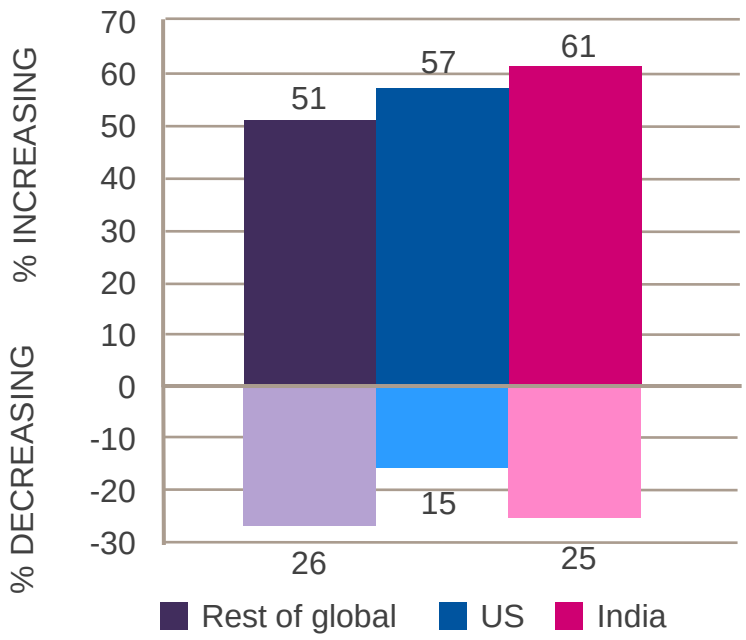
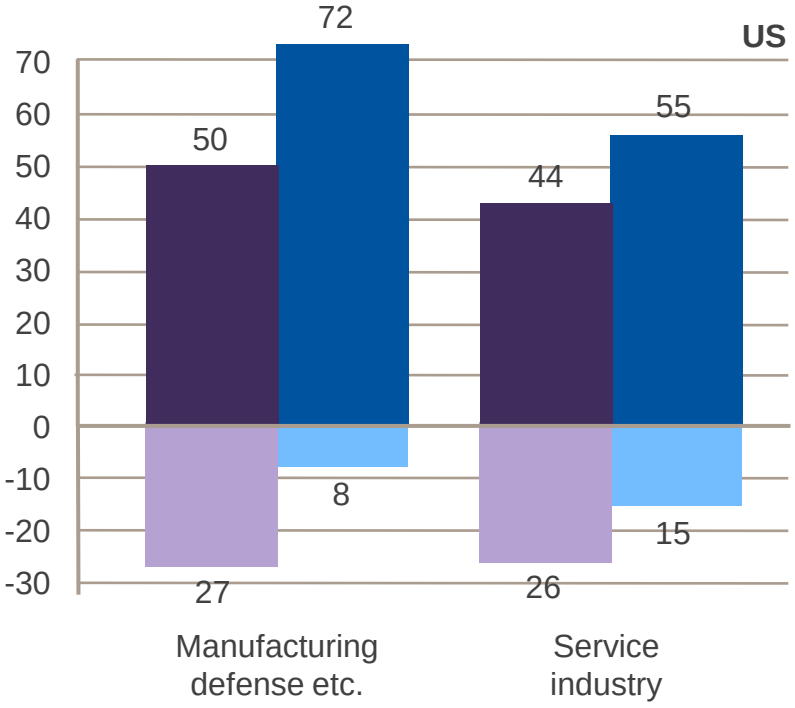
# US AND INDIA ALSO ANTICIPATE HIGHER LEVELS OF EXPANSION IN VM HOURS, REFLECTING THEIR OPTIMISM FOR CLOUD SERVICES

In the US, this growth has a broad base; it is seen across the Manufacturing, Defense, Food production, Pharma, and Consumer goods vertical, as well as in the service industries

**QTEXT:** HOW DO YOU EXPECT THE NUMBER OF VIRTUAL MACHINES (VMS) ACTIVE AT PEAK USAGE TIME TO CHANGE IN YOUR COMPANY IN THE NEXT YEAR?




*Rest of Global figures exclude US and India




*Global figures exclude US



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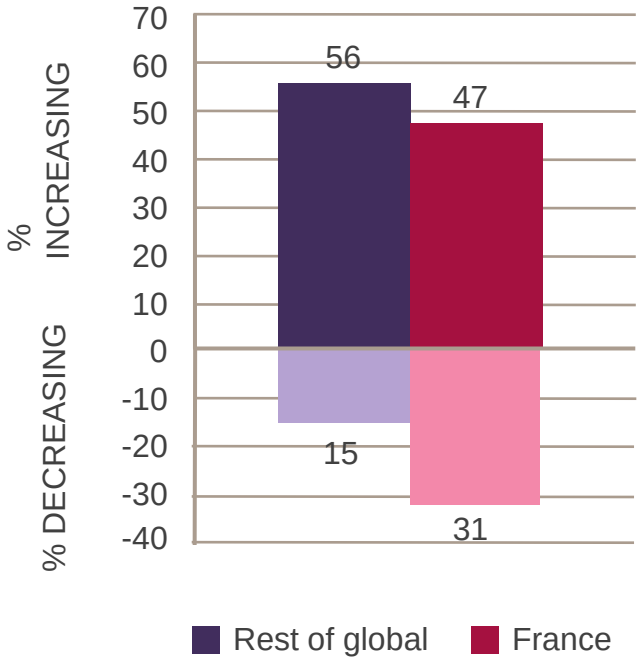
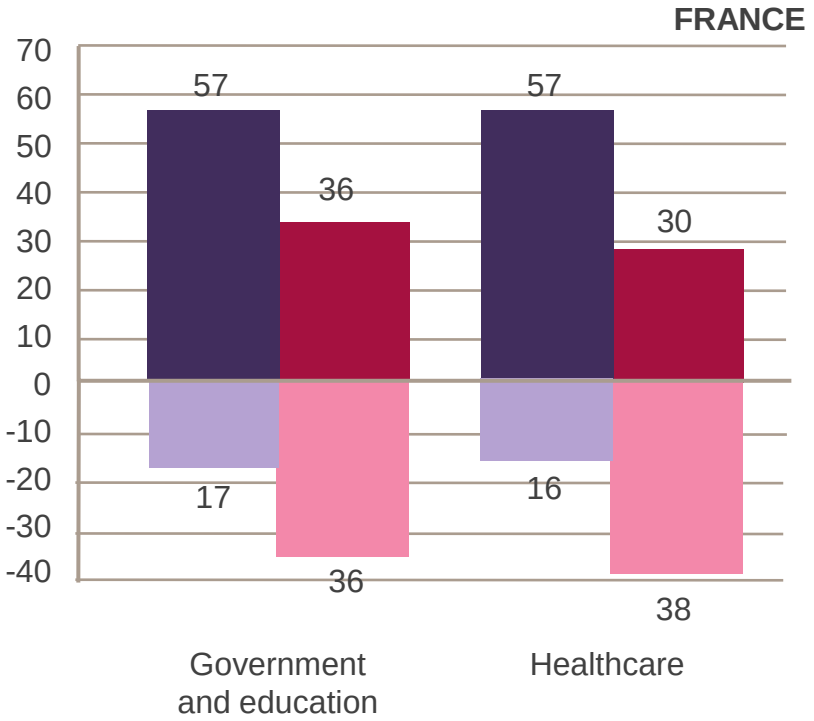
# FRANCE SHOWS LESS OPTIMISM ABOUT GROWTH IN VM USAGE, WITH NEARLY ONE THIRD ANTICIPATING A DECREASE IN THE NEXT YEAR

The sectors related to public services, such as Government, Education, and Healthcare, expect to see their demand for VMs to decrease in the near future

**QTEXT:** HOW DO YOU EXPECT THE NUMBER OF VIRTUAL MACHINES (VMS) ACTIVE AT PEAK USAGE TIME TO CHANGE IN YOUR COMPANY IN THE NEXT YEAR?



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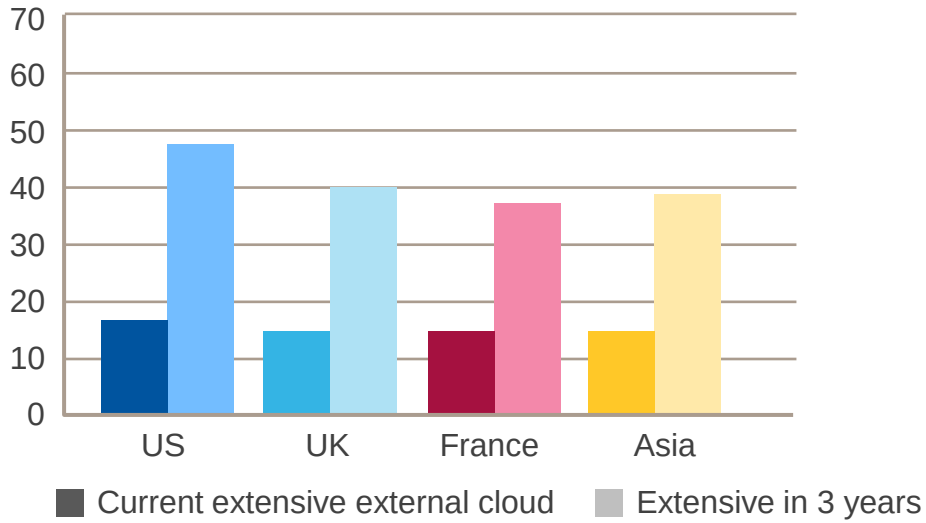
# ATTITUDINAL CLUSTERS BASED ON ITDMs' AGREEMENT WITH 23 ATTITUDINAL QUESTIONS ABOUT CLOUD REVEALED SOME SIMILAR STRAINS OF THINKING IN EACH COUNTRY

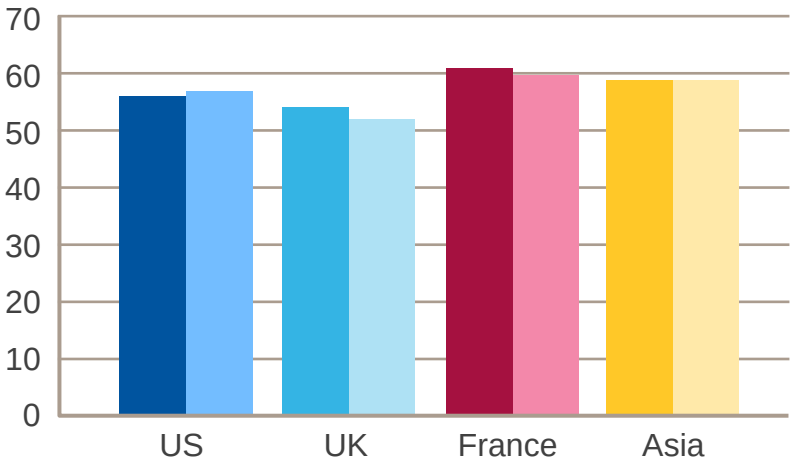
## LATE BLOOMERS

- Not currently heavily invested in cloud technologies, but anticipates doubling external cloud usage in next 3 years
- Typically report being less familiar with cloud than other groupings
- Comprises 15-30% of ITDMs; as expected, they are fewest in US and largest in UK

## CONFLICTED

- Already heavily invested in cloud computing technologies, and anticipates little change in external usage in upcoming years
- Strongly agrees with the strengths of cloud, but also readily acknowledges the dangers and drawbacks
- 14-24% of ITDMs; largest in India and US





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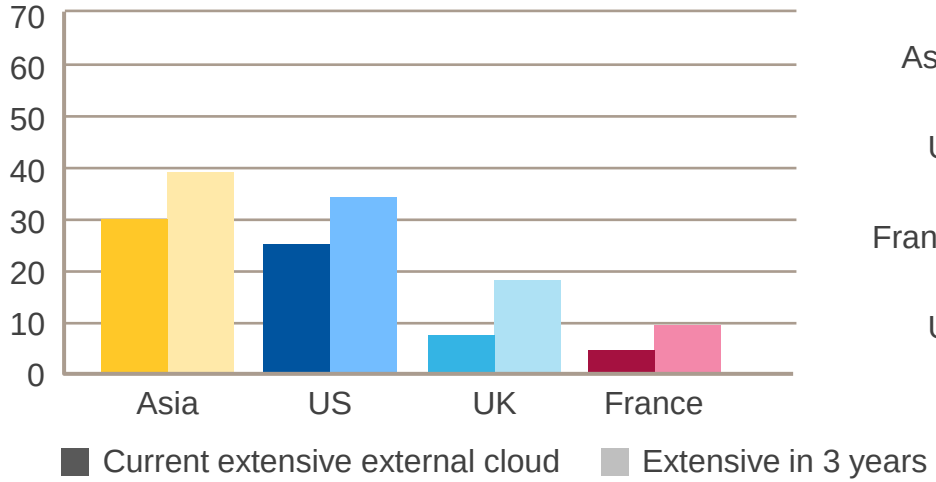
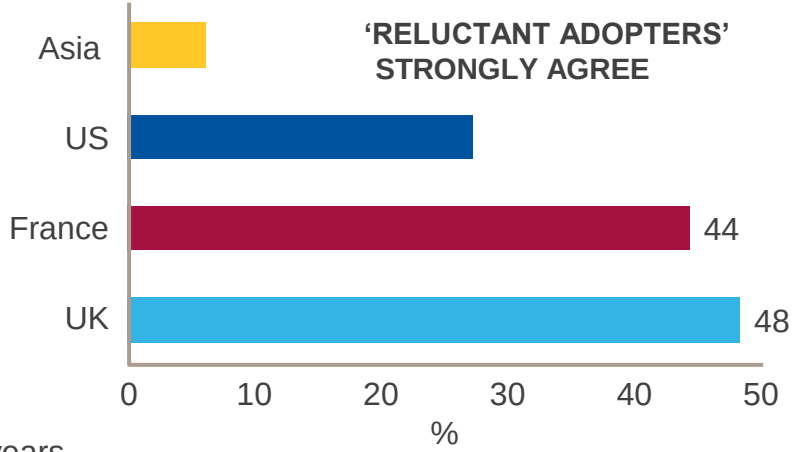
# BUT THE UK AND FRANCE SHOW DISTINCT ATTITUDINAL PATTERNS THAT REFLECT GREATER SKEPTICISM TOWARDS THE CLOUD

- While each study revealed a group of 'Reluctant Adopters'—ITDMs who are only tepidly investing in cloud solutions—these groups are much stronger in Europe than elsewhere
  - While in Asia and the US at least one third of 'Reluctant Adopters' are expecting to have extensive use of cloud in 3 years, that number is 1 in 6 in the UK and 1 in 12 in France
  - Negative attitudes towards the cloud are much stronger amongst 'Reluctant Adopters' in UK and France, while their lackluster agreement with positive statements is universal




**"SLAs** AVAILABLE TODAY **DON'T SUFFICIENTLY PROTECT** COMPANIES FROM THE POTENTIAL RISKS ASSOCIATED WITH CLOUD SOLUTIONS"



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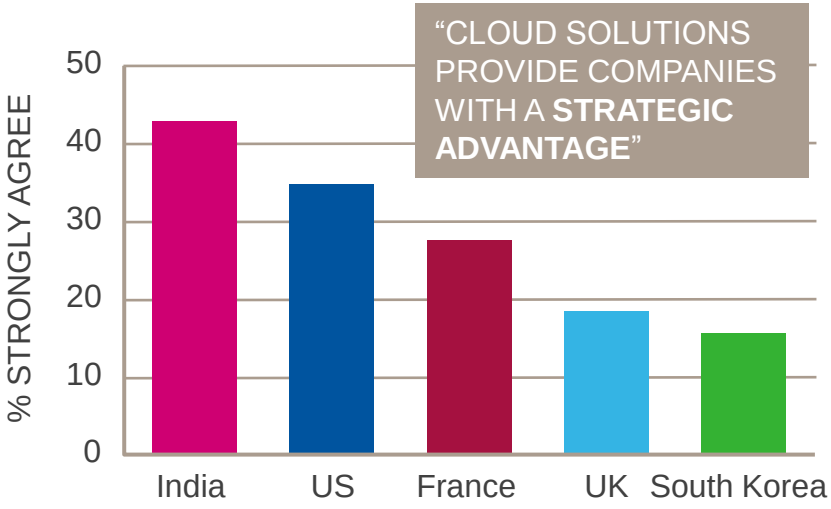
# ANALYSIS OF TOP-LINE, NATIONAL ATTITUDES TOWARDS THE CLOUD EXPOSES TRENDS, ESPECIALLY IN THE UK AND INDIA

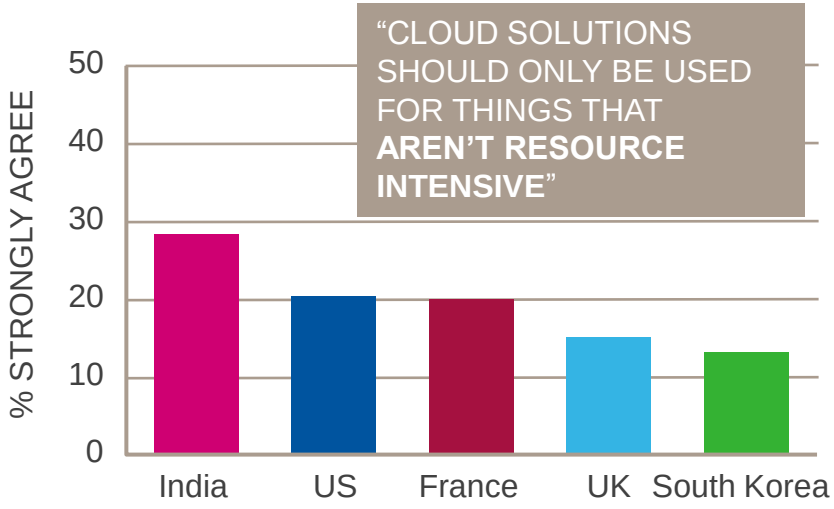
## UK: UNDERWHELMED

- Neither deeply pessimistic and critical of cloud nor positive and optimistic
- This is unique to the UK; Asia, US, and France each show at least one group of 'Cloud Optimists', characterized by expressing strong agreement with positive claims and very little agreement with negative statements

## INDIA: BEST ALTERNATIVE

- Indian ITDMs tended to agree with both the strengths and negatives of cloud services
- This seems to be related to the unique telecom infrastructure realities of the Indian market. While cloud services remain imperfectly implemented in the country, the alternatives of high prices and weak performance make it the best alternative.





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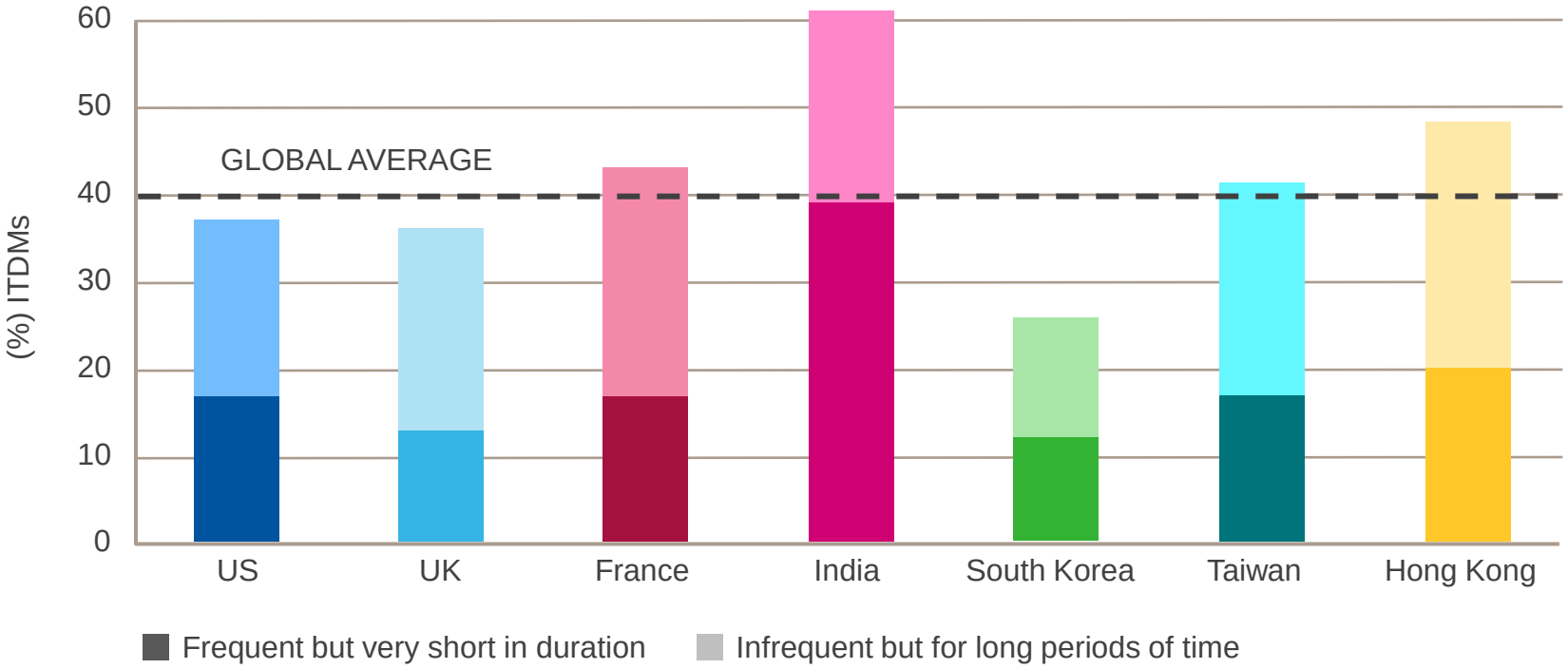
# FULLY 2 IN 5 ITDMs REPORT EITHER FREQUENT OR LENGTHY SERVICE OUTAGES, BUT THE WORST IS IN INDIA

And yet cloud services clearly remains the best option for Indian firms due to weak and lacking telecom infrastructure

**QTEXT:** HOW WOULD YOU DESCRIBE OUTAGES YOU HAVE EXPERIENCED, IF ANY?





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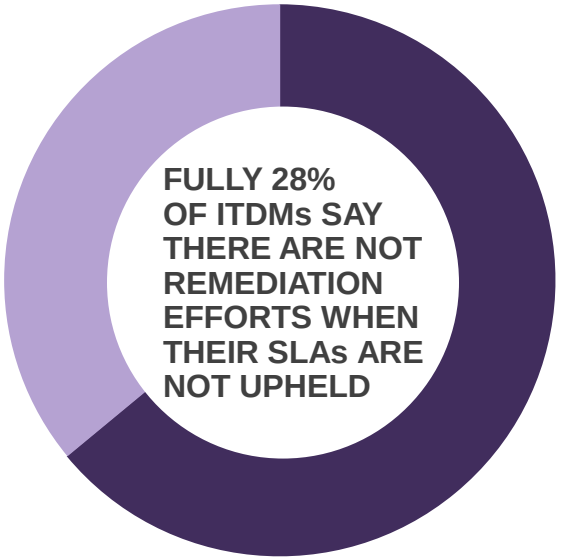
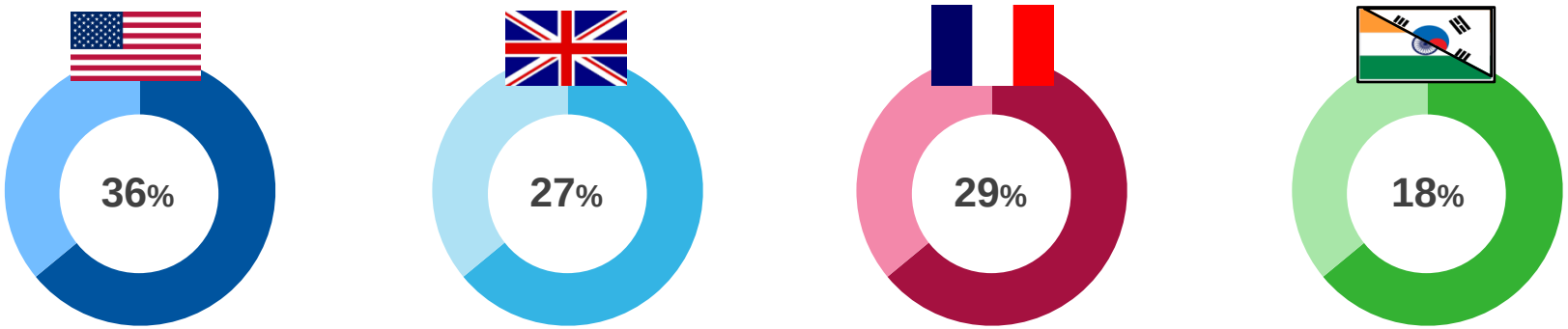
# AND A LACK OF REMEDIATION EFFORTS IN SLAs MEANS THAT FIRMS ARE NOT COMPENSATED FOR POOR SERVICE

- More than 1 in 4 ITDMs around the globe sees no remediation efforts when their SLAs are not upheld. Furthermore almost half (40-46%) of these ITDMs cited “annoying” or “intolerable” latency (150ms – 500ms). In France this number stands at a staggering 75%.
- This suggests potential opportunity for cloud providers who are willing to offer guarantees




% with no remediation efforts when their SLAs are not upheld




**QTEXT:** ARE THERE REMEDIATION EFFORTS IF YOUR SLAs (SERVICE LEVEL AGREEMENTS) FALL BELOW COMMITTED LEVELS?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# METHODOLOGY: UNDERSTANDING ITDMs' TOP FRUSTRATIONS WITH CLOUD

- ITDMs were asked to identify the aspect of their cloud solution that needed most improvement
  - VM stability
  - Response time
  - End-to-end availability (data and server network)
  - Ease of provisioning/configuration
  - Ease of management and control
  - Data security
  - Cost
  - Customer service
  - More feature options

PERFORMANCE

EASE OF USE

Several of the narrowly-defined responses were grouped according into the broader categories of "Performance" and "Ease of Use," as displayed above.

**QTEXT:** WHAT SINGLE ASPECT OF YOUR CURRENT CLOUD SOLUTION NEEDS THE MOST IMPROVEMENT?



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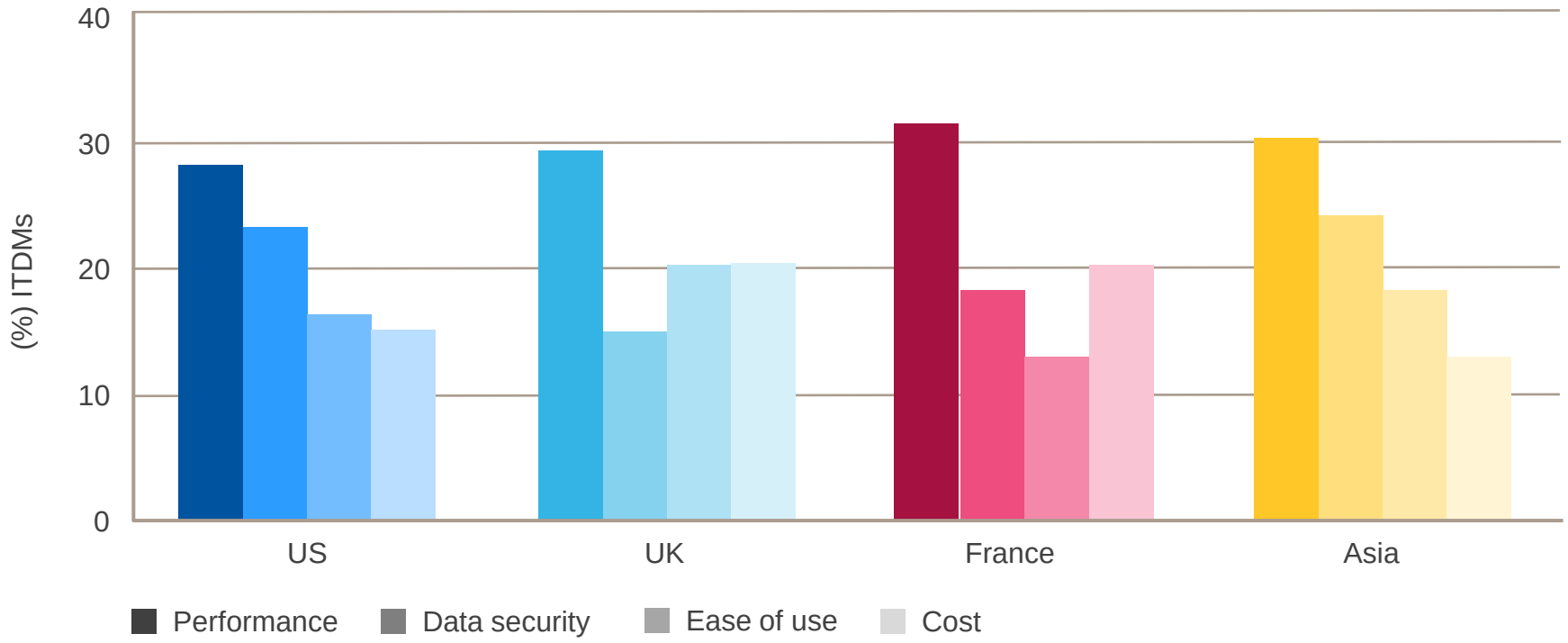
# STRONG PERFORMANCE IMPROVEMENTS ARE AT THE TOP OF ITDMs' DEMANDS ACROSS MARKETS

While data security is a concern, it is trumped by a desire to see greater, more reliable performance, and in Europe it falls behind demand to see lower costs

**QTEXT:** WHAT SINGLE ASPECT OF YOUR CURRENT CLOUD SOLUTION NEEDS THE MOST IMPROVEMENT?





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# FURTHER REFINEMENT IN DESIRABLE PROVIDER QUALITIES WAS ATTAINED THROUGH AN IN-DEPTH CORRELATION EXERCISE

- ITDMs were asked to identify the provider they most associated with each of a list of 20 positive attributes.
- These attributes were then correlated with the provider the respondent said they were most likely to choose for a cloud solution.

| US | UK | FRANCE | ASIA |
|---|---|---|---|
| Offers a cloud solution I could trust with my **most mission critical applications** | Offers a cloud solution that meets my company /industry compliance requirements for my **most critical applications** | Offers access to API features/functionality | Provides a **secure** cloud solution |
| Provides a **secure** cloud solution | Provides highly **scalable, elastic** products and services | Offers a cloud solution I could trust with my most **mission critical** applications | Offers a large choice of configuration **options** |
| Offers great **tools** that allow system administrators to monitor usage and availability | Is a **trusted** partner who works with me to address my needs | Is a **leader** in cloud technology and cloud solutions | Is the type of company that **understands** the needs of IT departments |
| Is a **leader** in cloud technology and cloud solutions | Provides a **secure** cloud solution | Provides a **secure** cloud solution | Is a **trusted** partner who works with me to address my needs |
| Is a company I can be confident will live up to its promises and be legally **responsible** if it doesn't | Once the solution is configured, it just **works** | Provides products and services that are simple and **easy to use** | Offers a cloud solution that meets my company/industry compliance requirements for my **most critical applications** |


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# DEMAND FOR CLOUD SOLUTIONS WORTHY OF MISSION CRITICAL APPLICATIONS IS UNDENIABLE

- ITDMs were asked to identify the provider they most associated with each of a list of 20 positive attributes.
- These attributes were then correlated with the provider the respondent said they were most likely to choose for a cloud solution.

## MISSION CRITICAL

| US | UK | FRANCE | ASIA |
|---|---|---|---|
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# WITHOUT A DOUBT, ITDMs WANT TO BE CERTAIN OF THE SECURITY OF THEIR CLOUD SOLUTION

- ITDMs were asked to identify the provider they most associated with each of a list of 20 positive attributes.
- These attributes were then correlated with the provider the respondent said they were most likely to choose for a cloud solution.

## SECURE SOLUTION

| US | UK | FRANCE | ASIA |
|---|---|---|---|
| Offers a cloud solution I could trust with my **most mission critical applications** | Offers a cloud solution that meets my company /industry compliance requirements for my **most critical applications** | Offers access to API features/functionality | Provides a **secure** cloud solution |
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# APPRECIATION FOR LEADERSHIP IN CLOUD VARIES TELLINGLY

- ITDMs were asked to identify the provider they most associated with each of a list of 20 positive attributes.
- These attributes were then correlated with the provider the respondent said they were most likely to choose for a cloud solution.

## LEADERSHIP

| US | UK | FRANCE | ASIA |
|---|---|---|---|
| Offers a cloud solution I could trust with my **most mission critical applications** | Offers a cloud solution that meets my company /industry compliance requirements for my **most critical applications** | Offers access to API features/functionality | Provides a **secure** cloud solution |
| Provides a **secure** cloud solution | Provides highly **scalable, elastic** products and services | Offers a cloud solution I could trust with my most **mission critical** applications | Offers a large choice of configuration **options** |
| Offers great **tools** that allow system administrators to monitor usage and availability | Is a **trusted** partner who works with me to address my needs | Is a **leader** in cloud technology and cloud solutions | Is the type of company that **understands** the needs of IT departments |
| Is a **leader** in cloud technology and cloud solutions | Provides a **secure** cloud solution | Provides a **secure** cloud solution | Is a **trusted** partner who works with me to address my needs |
| Is a company I can be confident will live up to its promises and be legally **responsible** if it doesn't | Once the solution is configured, it just **works** | Provides products and services that are simple and **easy to use** | Offers a cloud solution that meets my company/industry compliance requirements for my **most critical applications** |


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# BUT THE IMPORTANCE OF "TRUST" IS UNIVERSAL; IT APPEARS NEAR TOP OF EVERY LIST DESPITE ONLY APPEARING IN 2 OF THE 20 ATTRIBUTES SHOWN

- ITDMs were asked to identify the provider they most associated with each of a list of 20 positive attributes.
- These attributes were then correlated with the provider the respondent said they were most likely to choose for a cloud solution.

## TRUST

| US | UK | FRANCE | ASIA |
|---|---|---|---|
| Offers a cloud solution I could trust with my **most mission critical applications** | Offers a cloud solution that meets my company /industry compliance requirements for my **most critical applications** | Offers access to API features/functionality | Provides a **secure** cloud solution |
| Provides a **secure** cloud solution | Provides highly **scalable, elastic** products and services | Offers a cloud solution I could trust with my most **mission critical** applications | Offers a large choice of configuration **options** |
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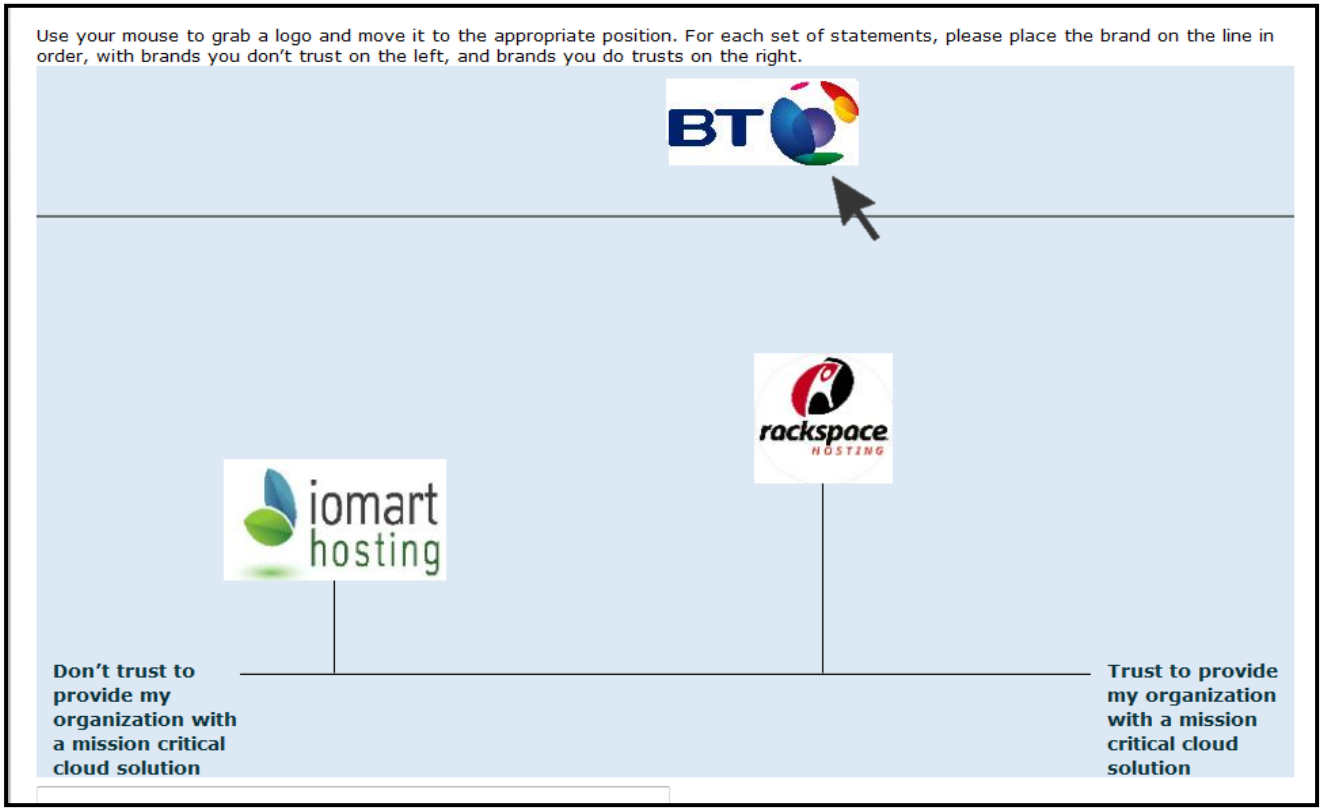
# METHODOLOGY: ITDMs RANKED CLOUD PROVIDERS ON A TRUST SCALE

- Positions on this trust scale were aggregated and averaged to find local and regional perspectives on brands





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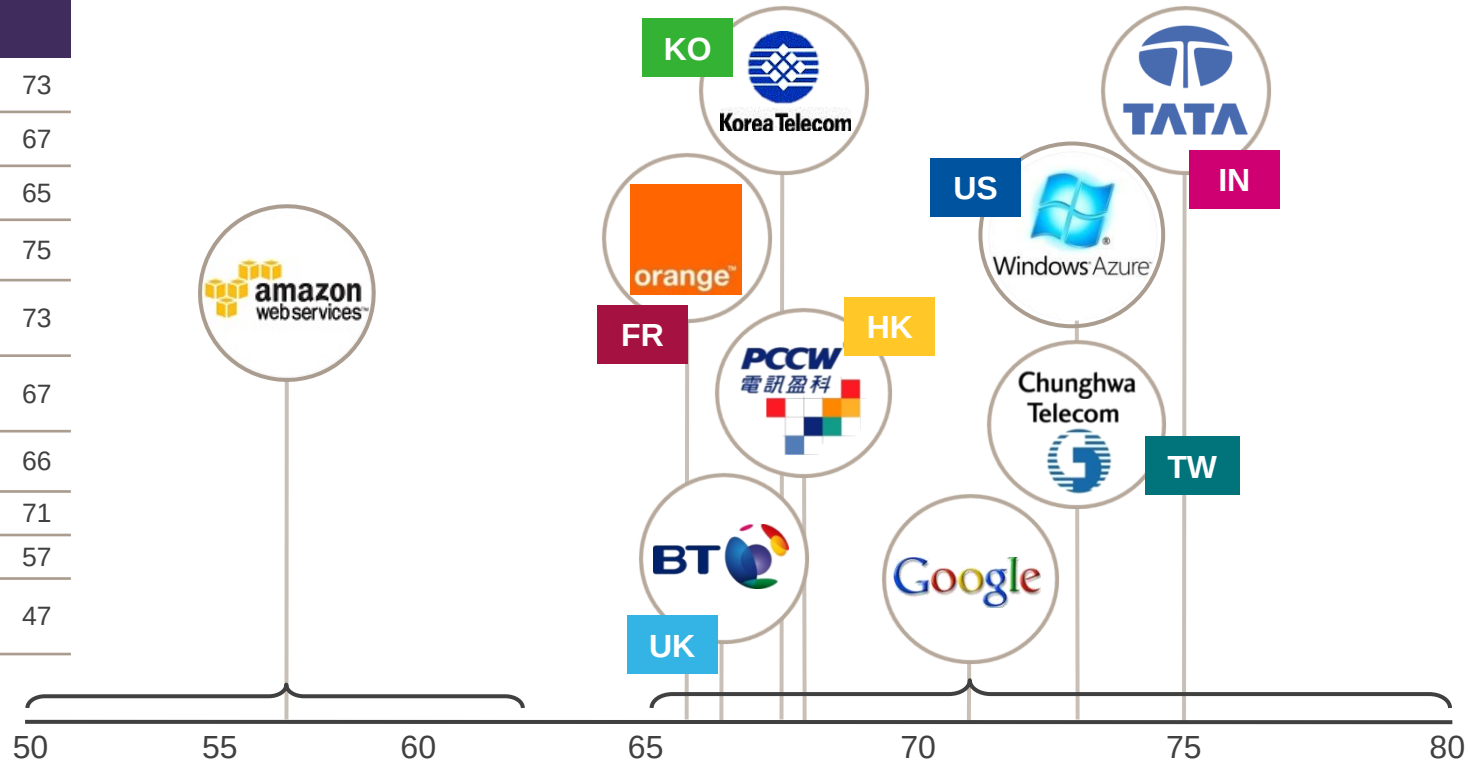
# CONSISTENTLY, THE BEST LOCAL BRAND COMPETES WITH GOOGLE TO BE THE MOST TRUSTED PROVIDER; AMAZON IS THE GLOBAL LOSER

## DON'T TRUST

| TRUST IN TOP LOCAL PROVIDERS | | |
|---|---|---|
| US | Microsoft | 73 |
| UK | BT | 67 |
| France | Orange | 65 |
| India | Tata | 75 |
| Taiwan | Chunghwa Telecom | 73 |
| Korea | Korea Telecom | 67 |
| Hong Kong | PCCW | 66 |
| Global Averages | Google | 71 |
| | Amazon | 57 |
| | A typical provider | 47 |

## TRUST TO PROVIDE YOUR ORGANIZATION WITH A MISSION CRITICAL CLOUD SOLUTION




**QTEXT:** FOR EACH SET OF STATEMENTS, PLEASE PLACE THE BRAND ON THE LINE IN ORDER, WITH BRANDS YOU DON'T TRUST ON THE LEFT, AND BRANDS YOU DO TRUSTS ON THE RIGHT.



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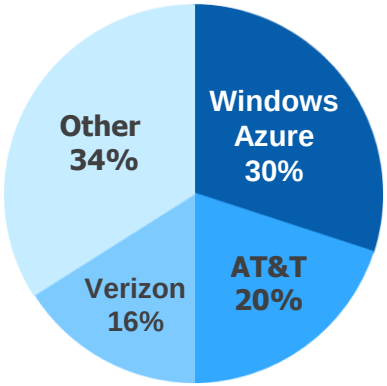
# BUT THERE IS A CLEAR PREFERENCE TOWARDS NATIVE PROVIDERS IN EAST ASIA, WHERE ONE LOCAL BRAND HOLDS AT LEAST 40% OF TOP STATUS

- This stands in contrast to the US market, where we see a far more competitive market place that splits ITDM perception of the brand leader

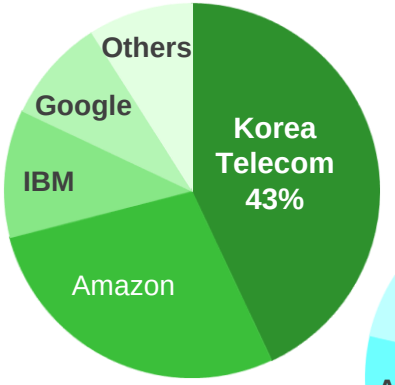
**QTEXT:** WHICH COMPANY DO YOU THINK WOULD BE MOST LIKELY TO WIN YOUR BUSINESS?

## US

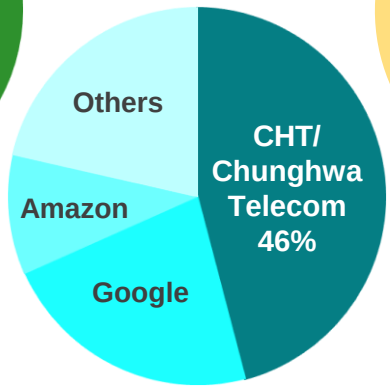



## EAST ASIA

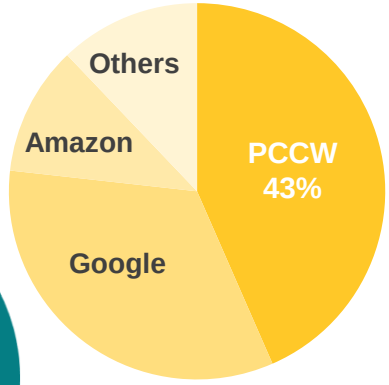
### SOUTH KOREA




### TAIWAN




### HONG KONG





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# IN THE US, A CORRELATION BETWEEN INDUSTRY AND CHOICE IN CLOUD PROVIDER IS EVIDENT

- The traditional sectors of manufacturing and services show a tendency towards conventional provider firms, such as AT&T and IBM
- Conversely, tech firms show a relatively stronger preference for specialty cloud service firms such as Salesforce and Rackspace

| | | INDUSTRY TYPE | | | | | | |
|---|---|---|---|---|---|---|---|---|
| CLOUD PROVIDER | ALL % | MANUFACTURING | SERVICE | GOV'T AND EDUCATION | HEALTHCARE | PROFESSIONAL SERVICES | FINANCE/ INSURANCE | TECH |
| Microsoft (Azure) | **40** | 56 | 36 | 37 | 43 | 46 | 28 | 35 |
| AT&T | **33** | 31 | 38 | 35 | 30 | 26 | 35 | 18 |
| Verizon/Terremark | **22** | 20 | 32 | 14 | 23 | 23 | 19 | 19 |
| IBM | **22** | 32 | 27 | 14 | 14 | 21 | 25 | 10 |
| Google | **20** | 22 | 27 | 17 | 19 | 22 | 11 | 32 |
| Amazon | **13** | 16 | 20 | 7 | 5 | 12 | 9 | 6 |
| Salesforce.com | **9** | 13 | 8 | 4 | 7 | 13 | 7 | 19 |
| Rackspace | **6** | 7 | 6 | 2 | 2 | 5 | 6 | 18 |

Strongest market presence  Weakest market presence


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# BRAND, PRICE, LATENCY GUARANTEES ARE KEY DRIVERS OF NEXT-GENERATION HIGH PERFORMANCE CLOUD ADOPTION; SECURITY PER SE NOT DIFFERENTIATOR

## **STRONG** DETERMINANTS OF TAKE

- Brand
- Price
- Latency guarantee
- Bandwidth guarantees
- Level of SLA guarantee
- Revenue reimbursement
- Redundancy
- Other: Complex network topologies, rapid instantiation

## **WEAK** DETERMINANTS OF TAKE

- Security
- Components
- CPUs
- Storage
- RAM
- Type of SLA guarantee
- Connectivity
- Reporting


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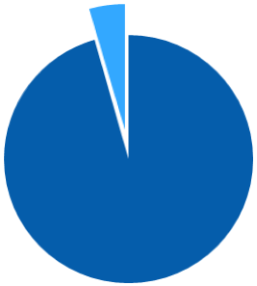
# CURRENTLY ITDMs NOT RUSHING TO PUT MISSION-CRITICAL APPS ON THE CLOUD GIVEN TYPICAL OFFERINGS TODAY, PROJECTED MARKET GROWTH RELATIVELY SMALL

- Example of typical cloud offering:
  - 2 CPUs
  - 1 TB of storage
  - 2 GB of RAM
  - 99.9% uptime
  - No other security features
  - Remediation of 10-25% of monthly bill based on length of downtime
  - No other guarantees

**4% OF MC SPENDING ON CLOUD**



**CURRENT TOTAL IT** SPEND OF THE MARKET**:**
**$497,666,041,300**

**CURRENT TOTAL MISSION-CRITICAL SPEND** OF THE MARKET**:**
**$194,016,000,000**

**PROJECTED** CURRENT MISSION CRITICAL CLOUD SPEND**:**
**$8,546,932,000**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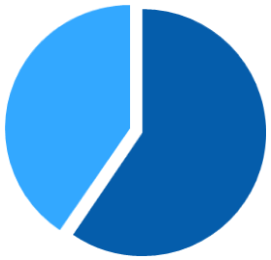
# HOWEVER, WHEN GIVEN GUARANTEES THAT ENSURE RELIABILITY, ACCOUNTABILITY, AND PERFORMANCE, REVENUE POTENTIAL INCREASES GREATLY

- High Performance cloud potential:
  - 16 CPUs
  - 5 TB of storage
  - 16 GB of RAM
  - 99.99% uptime
  - 10ms of latency guarantee
  - 100 Mb/s of bandwidth guarantee
  - Encrypted data
  - User-configured redundancy
  - Complex network topologies
  - 24/7 support
  - Remediation of lost revenue due to outage up to cost of 3 months of cloud solution

**41% OF MC SPENDING ON CLOUD***



**CURRENT TOTAL IT** SPEND OF THE MARKET**:**
**$497,666,041,300**

**CURRENT TOTAL MISSION-CRITICAL SPEND** OF THE MARKET**:**
**$194,016,000,000**

**PROJECTED** FUTURE MISSION CRITICAL CLOUD SPEND**:**
**$78,677,128,500**

* Assuming current IT and Mission Critical budgets stay constant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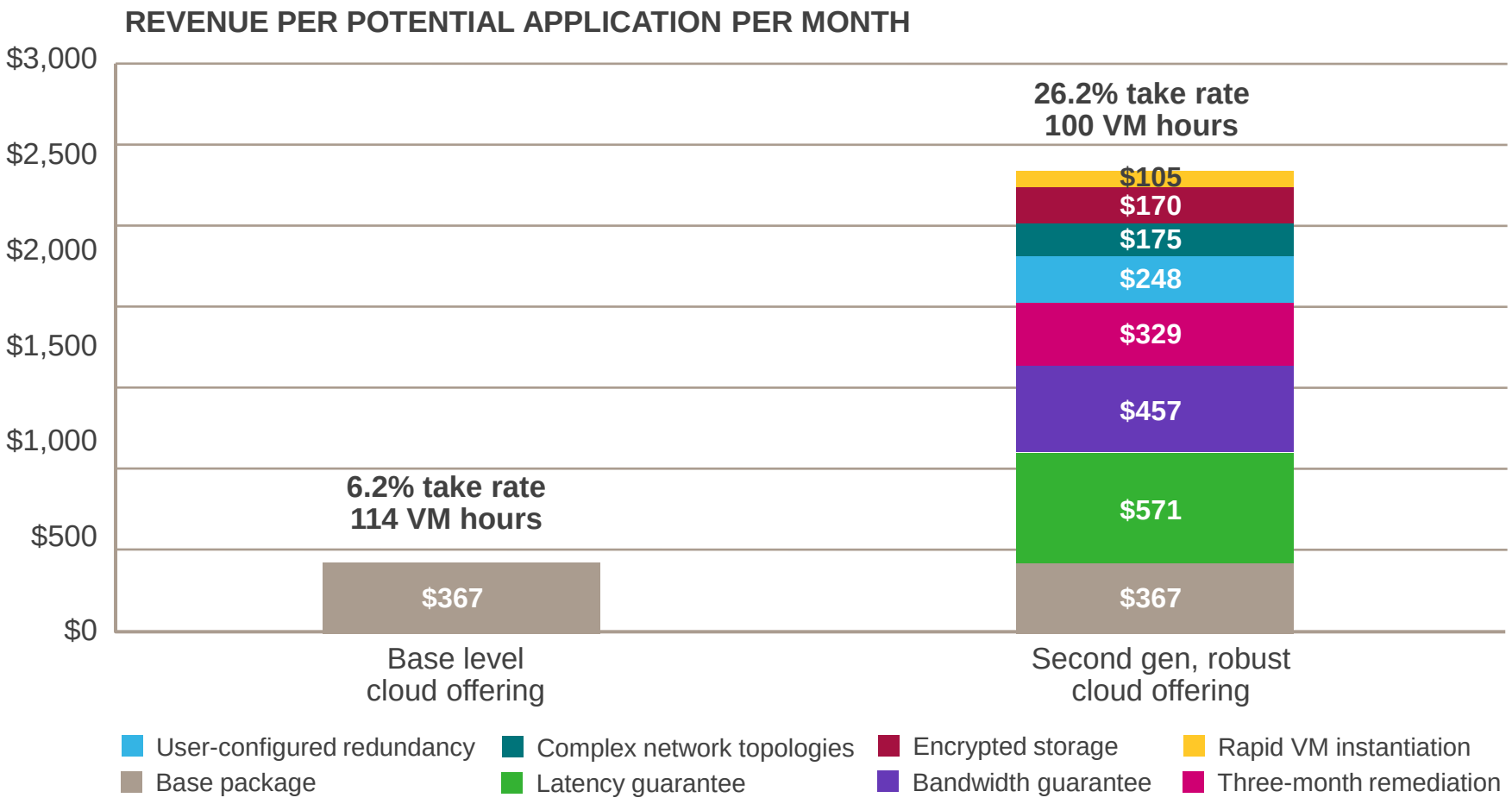
# ROBUST ENTERPRISE CLOUD HAS A FAR GREATER REVENUE AS WELL AS MORE THAN FOUR TIMES THE TAKE RATE, VM HOURS SIMILAR



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# INDIA AND THE US LEAD IN THE EXPECTED GROWTH OF CLOUD WHILE FRANCE AND THE UK SHOW UNINSPIRED FEELINGS AND GROWTH FOR CLOUD

- The US and India show the highest expected cloud usage for external cloud while France and the UK expect the lowest usage for external cloud in three years.
- India and the US show the highest percentage of those that strongly agree to both the pro and anti cloud statements. This shows that they like and believe in cloud but are very aware of the problems and issues that are currently present in the cloud solution.
- UK and France have the lowest percentage of those that strongly agree to both the pro and anti cloud statements. This along with the low satisfaction rates of cloud show the malaise towards cloud.


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# THE US IS THE CLEAR FAVORITE IN POSITIVE FEELINGS TOWARDS CLOUD, WHILE EUROPE SHOWS A LACK OF ENTHUSIASM

- When looking at the clusters amongst regions we see that the US is the clear favorite in terms of their feelings on cloud. Only 24% of American IDTMs do not see a significant increase in the extensive use of cloud in the next three years.
- There were many groups that behaved similarly in all regions that showed a lack of growth and was not high on cloud usage and its future. This showed to be more of a factor in Europe as there was an overall lack of enthusiasm amongst France and the UK.
- In 6 of the 7 countries performance was the aspect that ITDMs thought was the issue that needed the most improvement in cloud. Data security, cost, and ease of use rounded out the top four of concerns by ITDMs.


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# LOCAL PROVIDERS ARE DOMINATING THE MARKET SHARE

- Looking globally to providers and attributes we can see that all companies share a few attributes that correlate with their purchase.
- Within countries we see that local brands are competing with global providers or even overtaking them. This is especially true in France, Hong Kong, Taiwan, and South Korea.
- In trust we find that Google is globally the winner amongst all of the regions. By contrast, Amazon is distinguished as the global loser.
- Carriers within these countries can win market share by offering a premium cloud solution that offers guarantees, is continuously reliable, and understands the needs of IT departments and businesses.


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# OUR FINDINGS ARE SUPPORTED BY A RECENTLY PUBLISHED STUDY OF CLOUD USAGE IN ASIA CONDUCTED BY SPRINGBOARD RESEARCH AND COMMISSIONED BY VMWARE

- In a September survey of 6,953 respondents, it was indicated that cloud adoption in India and China were the leaders within the region with 43% and 39% of total organizations having cloud.
- The study shows that in several Asian markets cloud adoption has accelerated within the last eighteen months. We see this trend continuing for the next three years, especially in India where extensive external cloud usage will be the highest amongst all countries in our study.
- Of India's 693 respondents across various sectors in the September survey, the highest adoption is anticipated from the IT infrastructure and manufacturing sectors. This highly correlates with the conclusions that we have made based on our findings in India.


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