



Exploring the World of Many Clouds

Agatha Poon, Research Manager, Global Cloud Computing

All About the Cloud Summit
May 10 – 12, 2010

Agenda

1. Why does it matter to enterprises?
2. Cloud this, Cloud that, What are they?
3. Where are we headed?
4. How do you need to respond?

Why does it matter to enterprise ?

- Cost reduction in the short term
- Avoidance of capital expenditure
- Managing underutilized resources internally
- IT staff already using cloud services
- Flexibility in scaling IT up and down
- Rolling out new services rapidly



Agenda

1. Why does it matter to enterprises?
2. Cloud this, Cloud that, What are they?
3. Where are we headed?
4. How you need to respond?

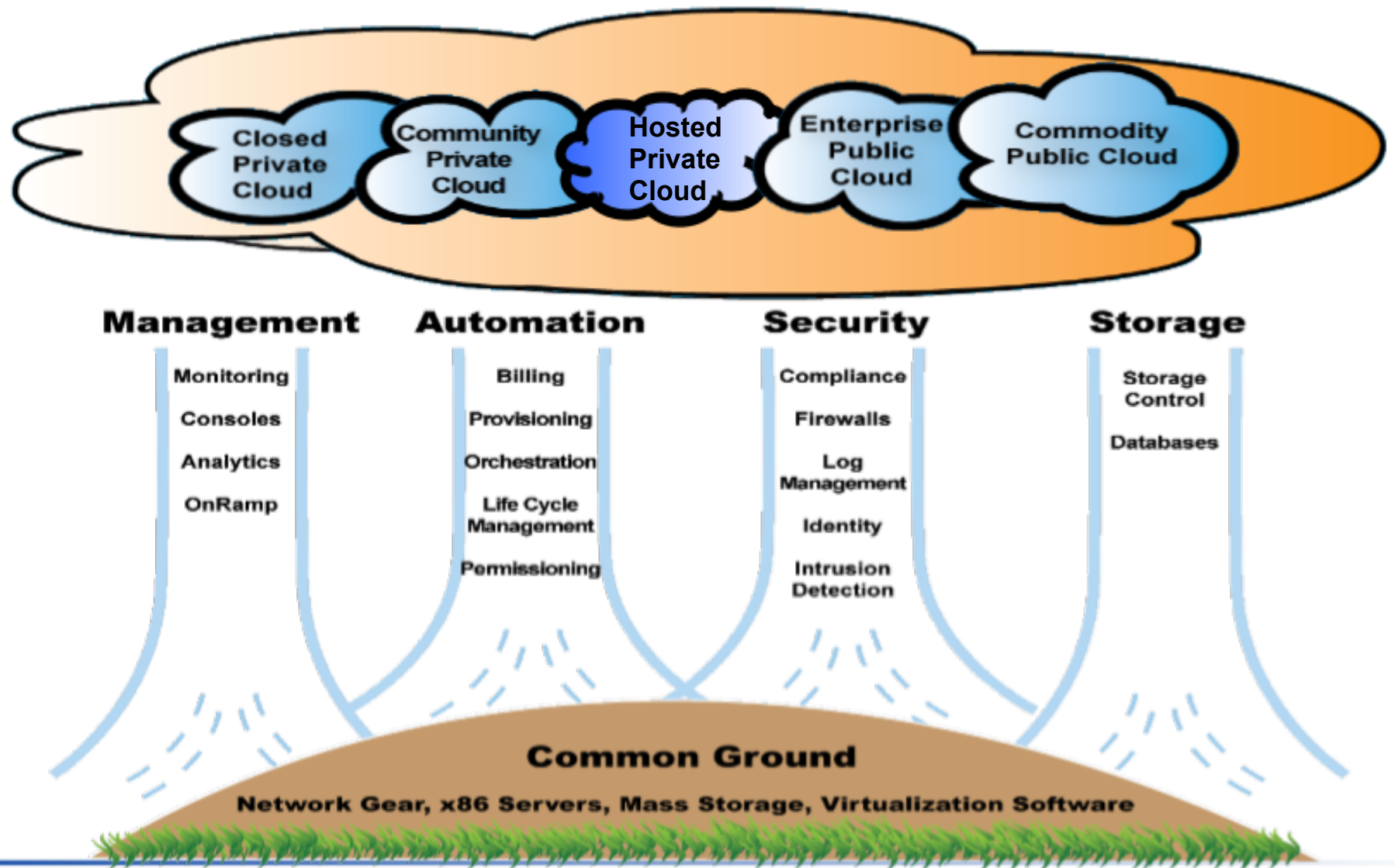
The Cloud Today

- on Premises Private Clouds
 - Bank of America, Bechtel, FedEx
- IaaS Public Clouds
 - AWS, Rackspace, Terremark, Savvis, AT&T, Verizon Business
- PaaS Public Clouds
 - Google App Engine, Microsoft Azure, Force.com, Facebook
- Cloud enablement
 - HP, IBM, Intel, VMWare, EMC, TrendMicro, SOASTA

? SaaS and Web 2.0

- Salesforce's CRM, Intuit, NetSuite, Google apps, SugarCRM, Microsoft Live

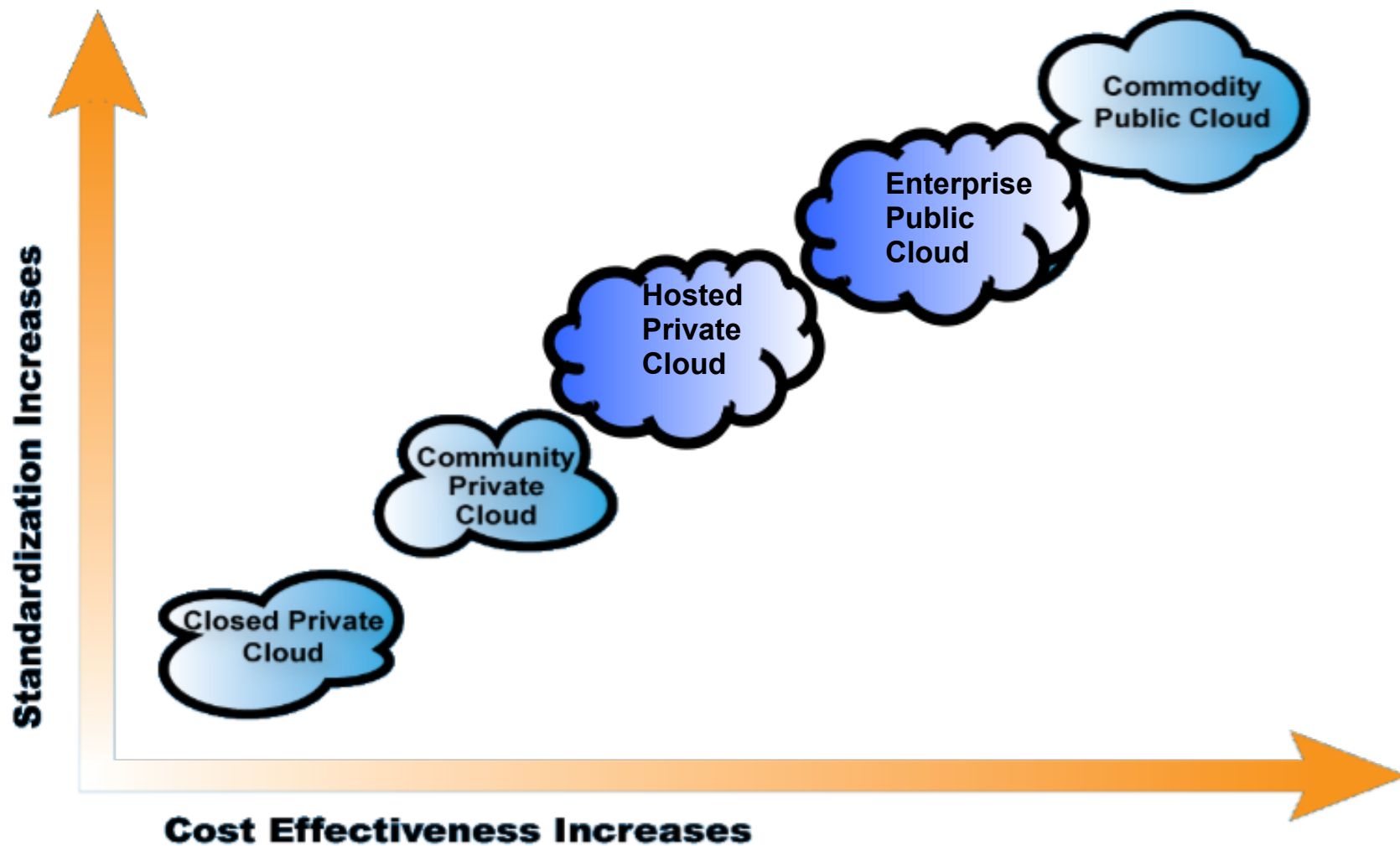
The cloud spectrum



All About the Cloud Summit

May 10 - 12, 2010

Cloud cost effectiveness



What's on offer?



Hybrid Solutions are vogue



Cloud Services are the discussions point

- Efficiency
- SLAs
- Monitoring, performance and BI
- Chargeback
- A la carte managed services
- Security and uptime
- Agility

Agenda

1. Why does it matter to enterprises?
2. Cloud this, Cloud that, What are they?
3. Where are we headed?
4. How do you need to respond?

Next Gen Cloud Trends

Trends

Growing appetite for private cloud deployment

Enforcing more stringent SLAs

Promoting cloud assurance and security

Introducing cloud assessment/migration services



Proof Points

Colt, Navisite, Rackspace, Savvis, Terremark, Verizon,

99.99%; 99.999%; 100% infrastructure, platform, portal

HA, IPVPN, Identity management, Access Controls

What does/ doesn't belong in the cloud-Smartsourcing

Next Gen Cloud Trends

Trends

Driving towards automated resources allocation and cloud orchestration

Enabling hybrid solutions and cloud federation

Facilitating unified computing

Achieving unified monitoring

Proof Points

VMWare's SpringSource acquisition

Colocation, Physical Dedicated, Virtual, Cloud

Acadia, EMC/VMWare/Cisco
HP, IBM, Microsoft

SLA, Security and Performance
CA, BMC



Top Internet Applications

Today

- Messaging and Collaboration
- CRM and BI
- BPO Apps
- Accounting/ERP
- Time Tracking

2012

- HR and accounting applications
- File server replacement
- Internet-based NAS/utility storage
- Project management and collaboration
- Shared database

Agenda

1. Why does it matter to enterprises?
2. Cloud this, Cloud that, What are they?
3. Where are we headed?
4. How do you need to respond?

Prepare for Battle

- Price war or Feature war?
- Enter the Enterprise
 - It's about Agility and speed
 - It's about Security & Privacy
 - It's about uptime
 - It's about flexibility and scalability
 - It's about more efficient Opex (and Capex)
 - It's about TCO and ROI
 - It's about control



Understanding Enterprise Expectations

1. SLAs driven by business needs
2. Migration strategy
3. High Security (assurance, DR, compliance)
4. Granular Monitoring and reporting (chargeback)
5. Technical Support
6. Flexibility of Cost/Pricing and no lock-in
7. Consistency in Technology
8. Agility, scalability and elasticity
9. New management features and Tools



Do your homework

- Do I know the market segment I'm after?
 - Enterprise: Flexibility, security, rapid provisioning, opex efficiency
 - SMB: Am I looking to mitigate bleeding to low cost alternatives?
- Am I a service provider, reseller or technology vendor
 - Is your business model congruent to the change?
 - How will you differentiate yourself?
- Have I got the right partners?
 - Virtualization, storage management, SIs, SaaS, cloud providers
- Be ready, it's a marathon investment
 - Start in the right place – i.e., billing mechanism, storage management, portal upgrades





**“Great minds must be ready not only
to take opportunities, but to make them.”**

Charles Colton

Questions?

Agatha Poon – Tier1 Research

agatha.poon@tier1research.com

