



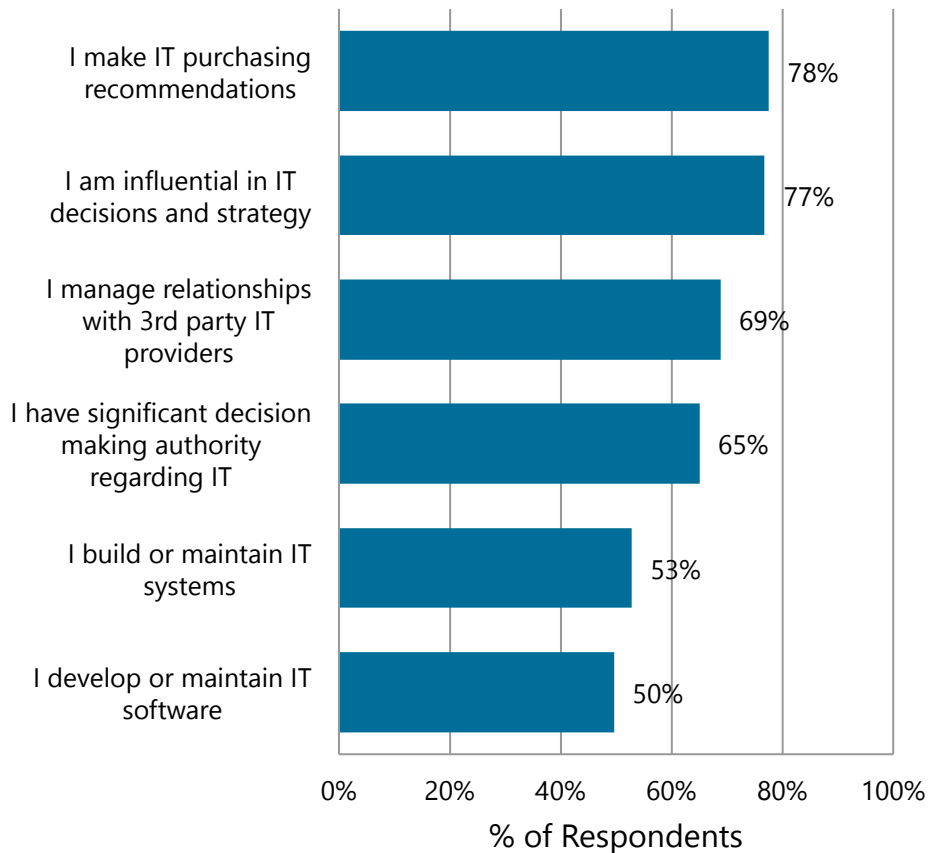
Hosting and Cloud Study 2015

Beyond Infrastructure:
Cloud 2.0 Signifies New Opportunities for Cloud
Service Providers

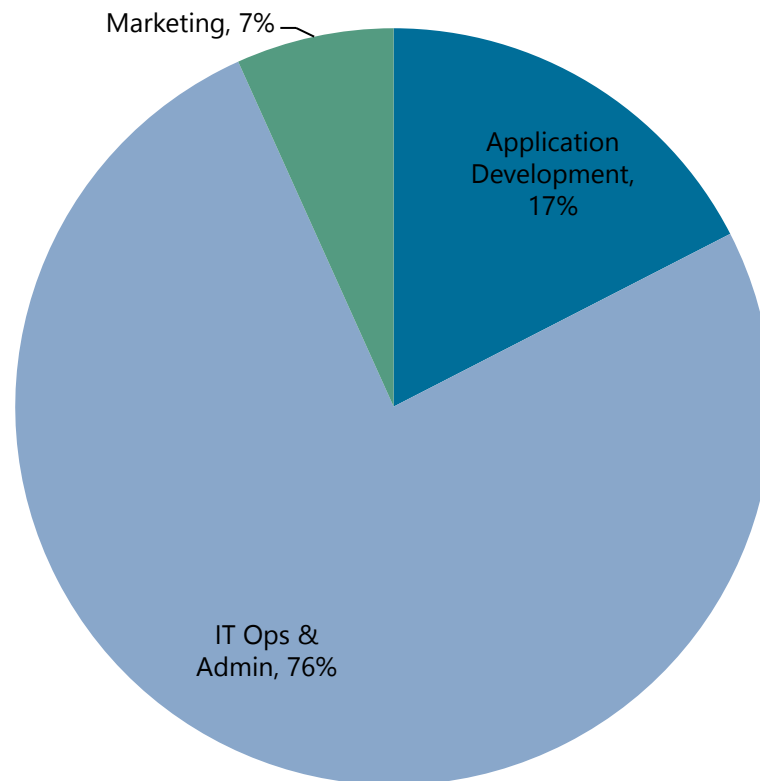
Survey Results

Demographics

Respondents by Role



Respondents by Department



N=1,316

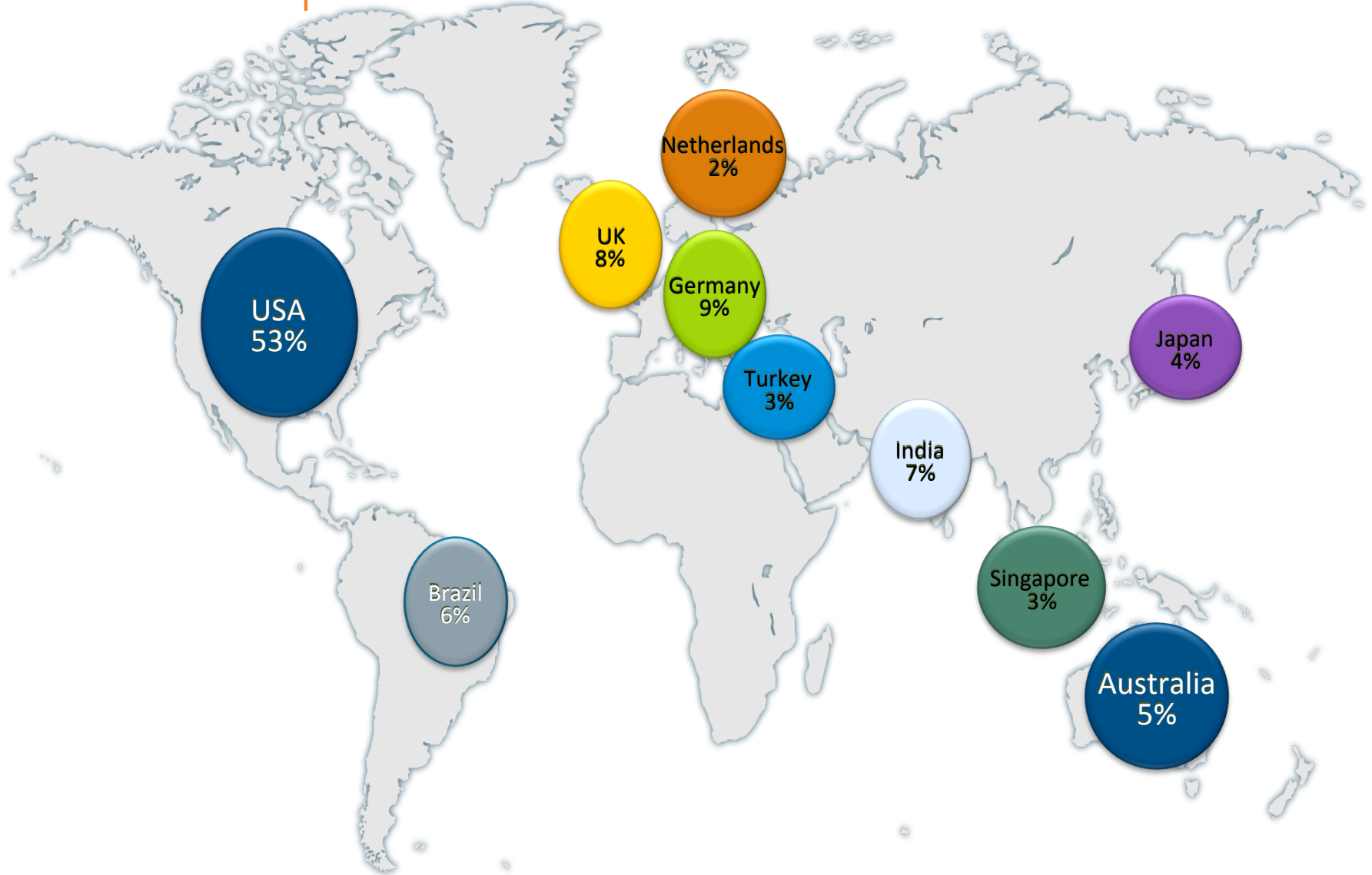
N=1,736

S2a. Which of the following categories best describes your organization's expected annual revenue for 2015? (\$US)

S1. Which department do you work in at your organization?

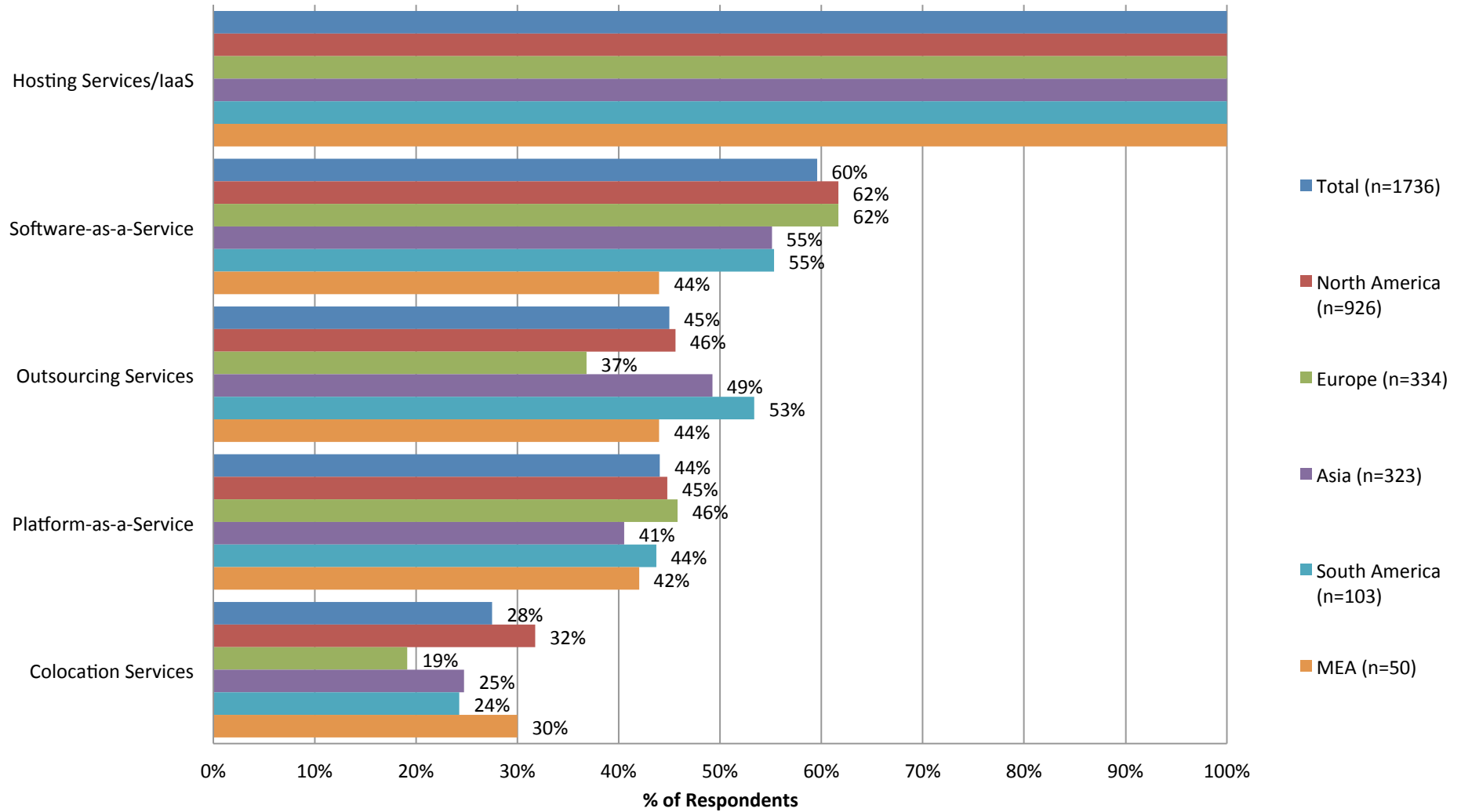
Worldwide Sample Size n=1,736

10 Countries Represented



BUDGET BY HOSTING SERVICES TYPE

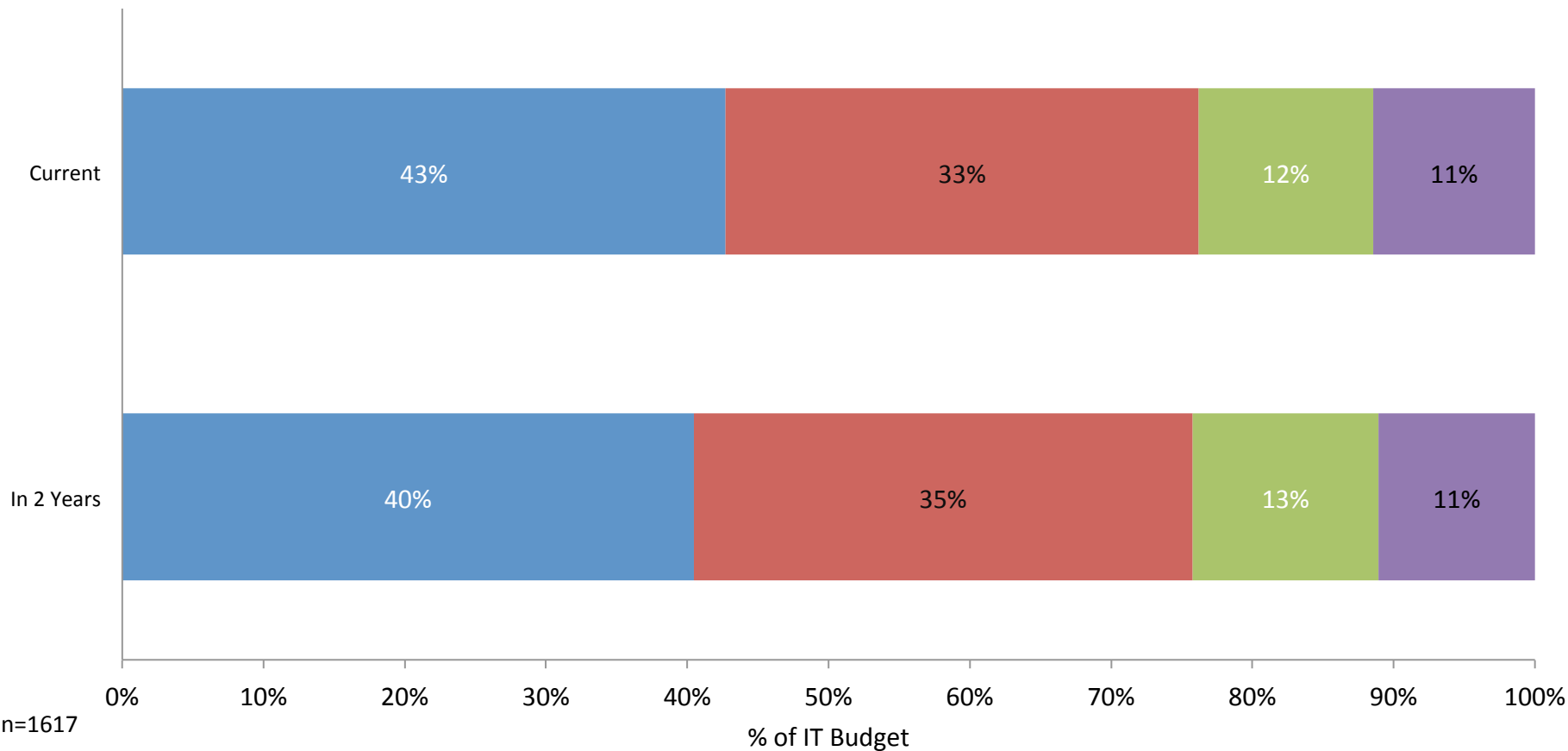
IT Services Currently Acquired



S7a. Which –if any – of the following IT services does your organization currently buy from service providers today? [Must select 2-Hosting Services, else terminate]

Current versus Future Budget Allocation

■ On-Premises Infrastructure & Staff ■ Hosting Services ■ SaaS ■ Other Off Premises services



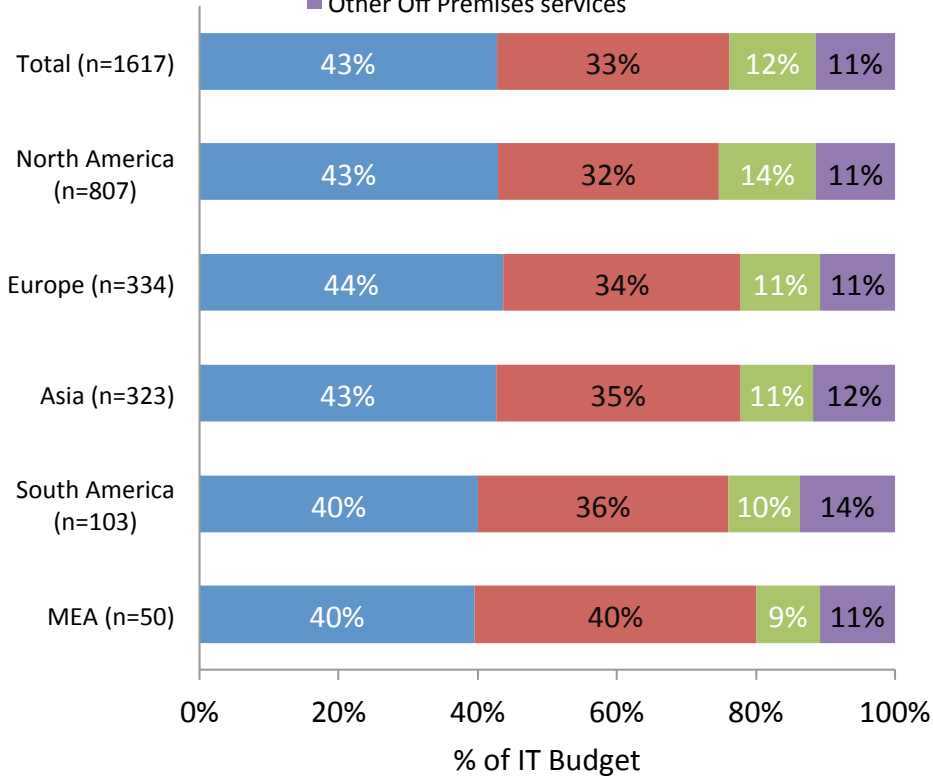
S8. Using your best guess, approximately what percent of your total IT budget in 2015 is allocated to: [sum to 100%]

S9. Now thinking out two years, approximately what percent of your total IT budget will be allocated to: [sum to 100%]

Current versus Future Budget by Region

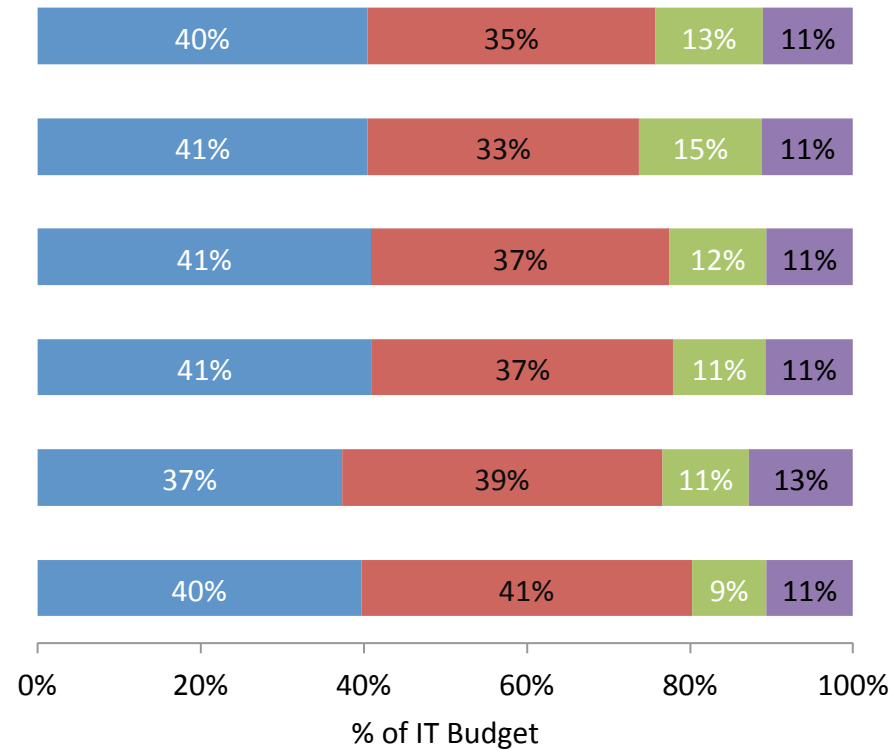
Current IT Budget Allocation

- On-Premises Infrastructure & Staff
- Hosting Services
- SaaS
- Other Off Premises services



Future IT Budget Allocation

- On-Premises Infrastructure & Staff
- Hosting Services
- SaaS
- Other Off Premises services

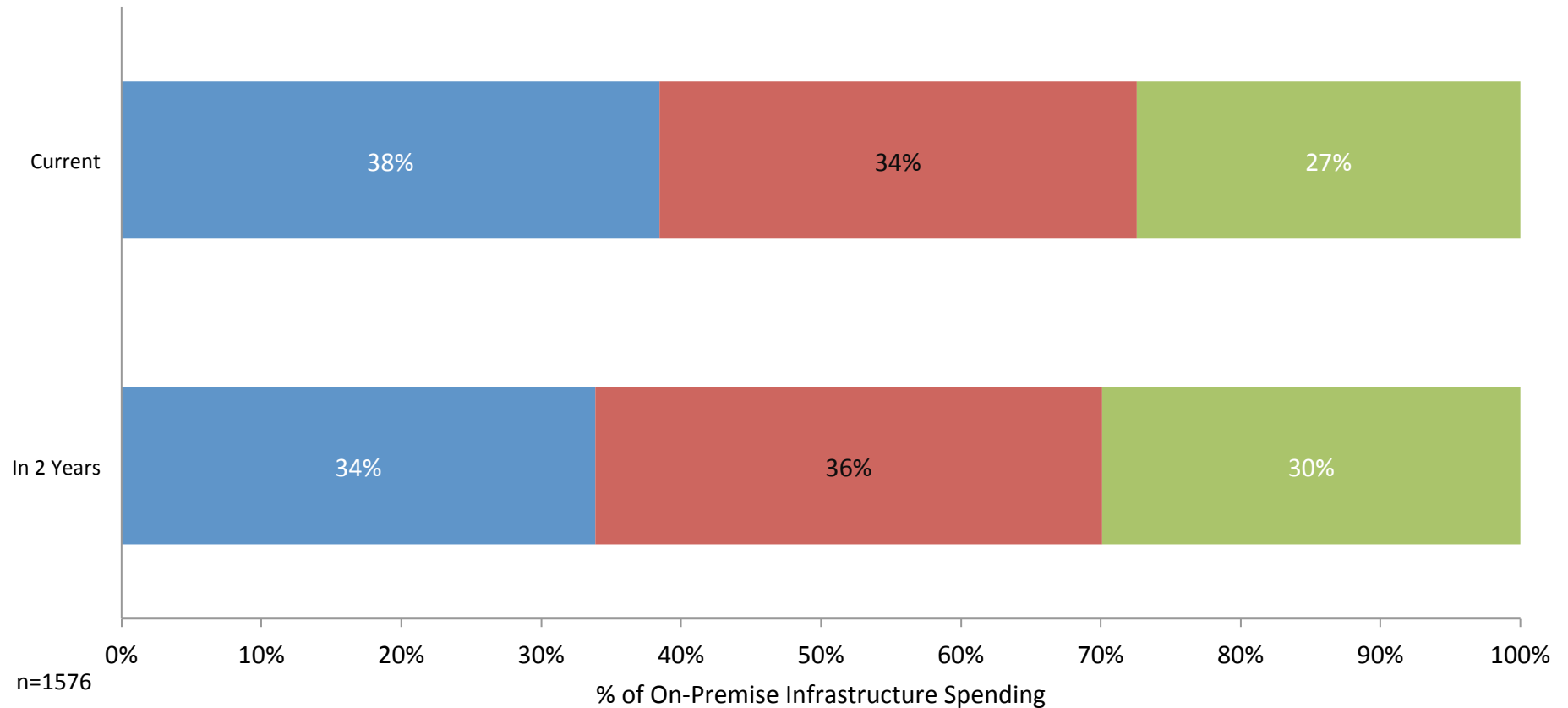


S8. Using your best guess, approximately what percent of your total IT budget in 2015 is allocated to: [sum to 100%]

S9. Now thinking out two years, approximately what percent of your total IT budget will be allocated to: [sum to 100%]

Infrastructure Spending On-Premise

■ Standalone non-virtualized infrastructure ■ Virtualized infrastructure ■ PRIVATE CLOUD (automated and orchestrated)

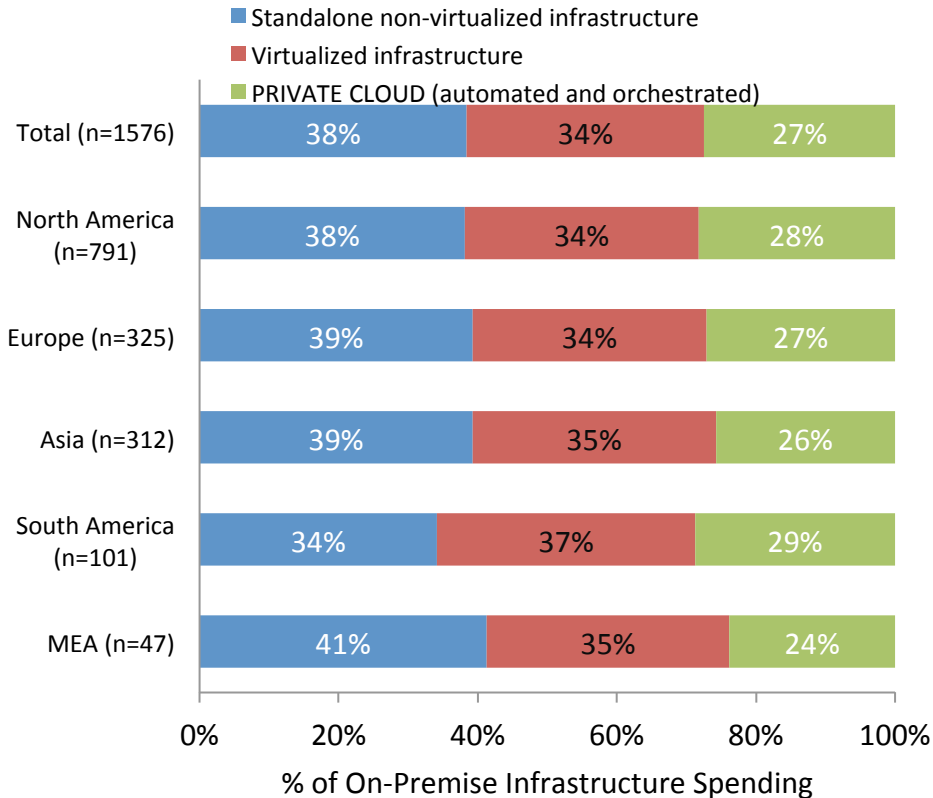


S10. Approximately, what percent of your on-premises infrastructure spending is split across the following three deployment models today? [Sum to 100]

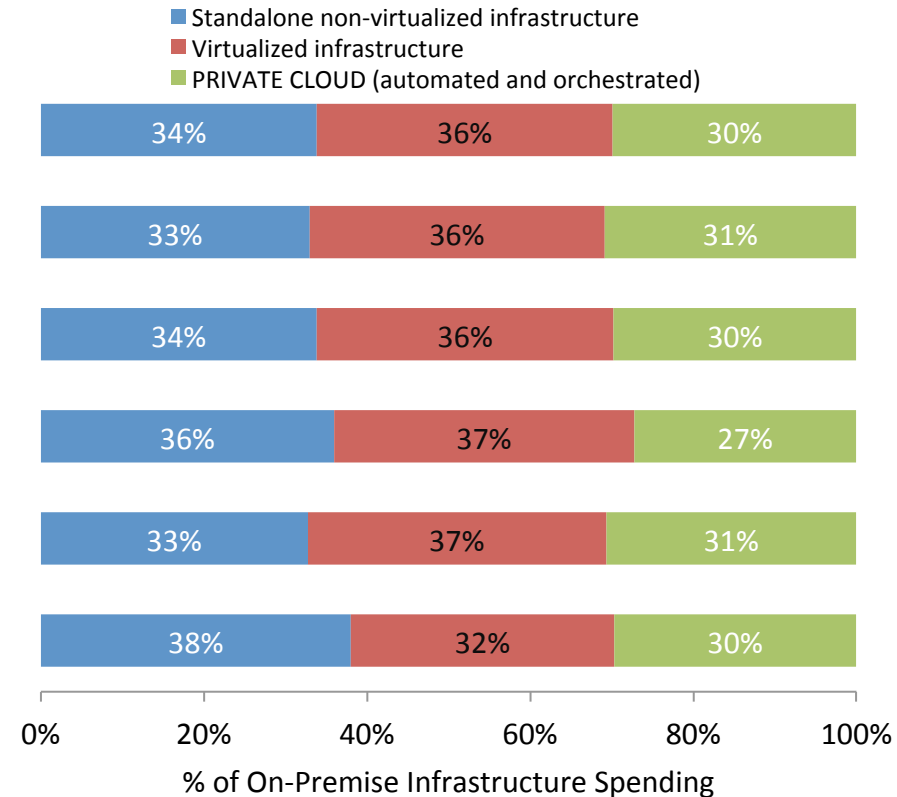
S11. Approximately, what percent of your on-premises infrastructure spending is split across the following three deployment models in two years? [Sum to 100%]

Current versus Future On-Premise Spending by Region

Current On-Premise Infrastructure Spending



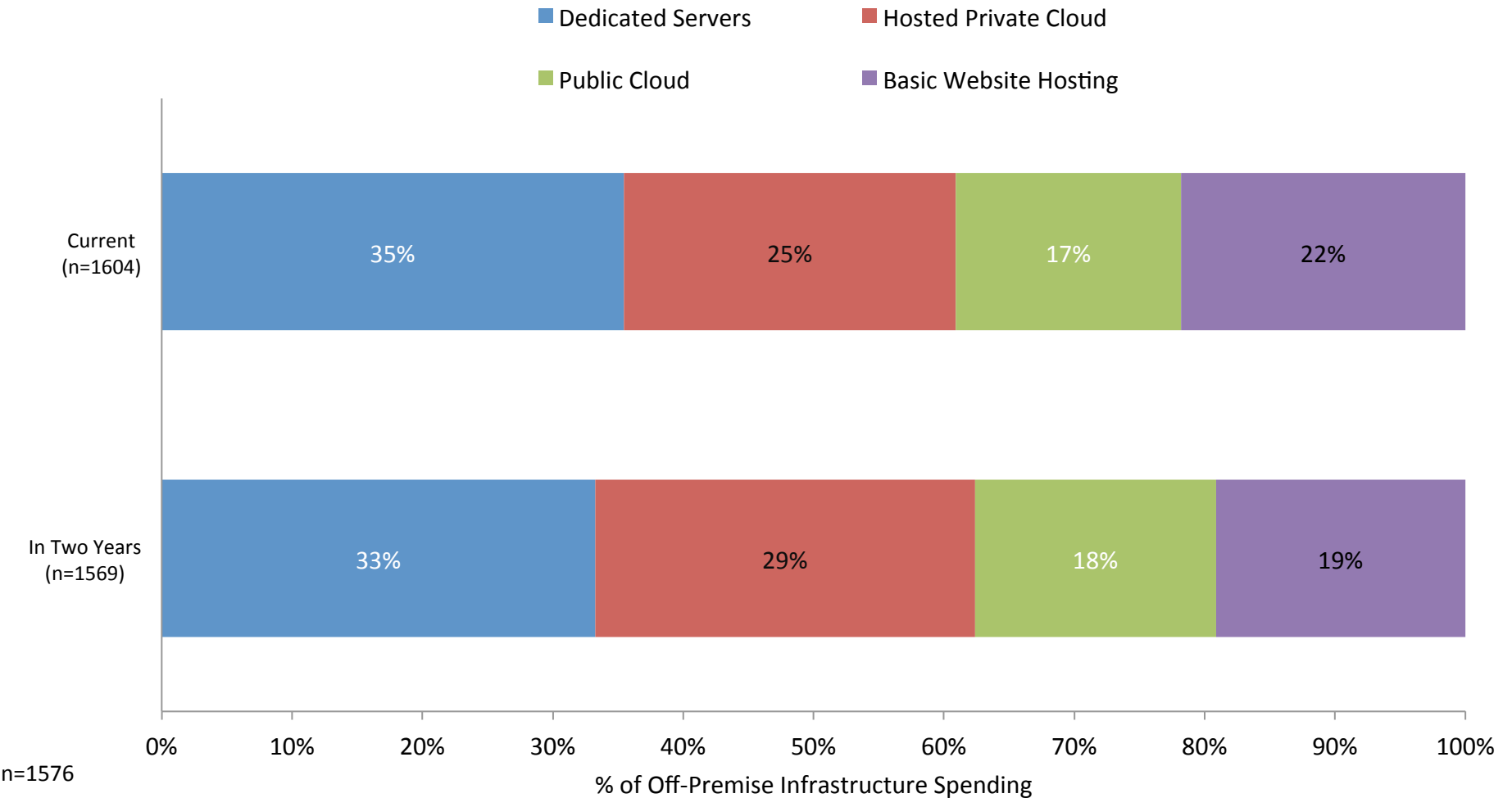
Future On-Premise Infrastructure Spending



S10. Approximately, what percent of your on-premises infrastructure spending is split across the following three deployment models today? [Sum to 100]

S11. Approximately, what percent of your on-premises infrastructure spending is split across the following three deployment models in two years? [Sum to 100%]

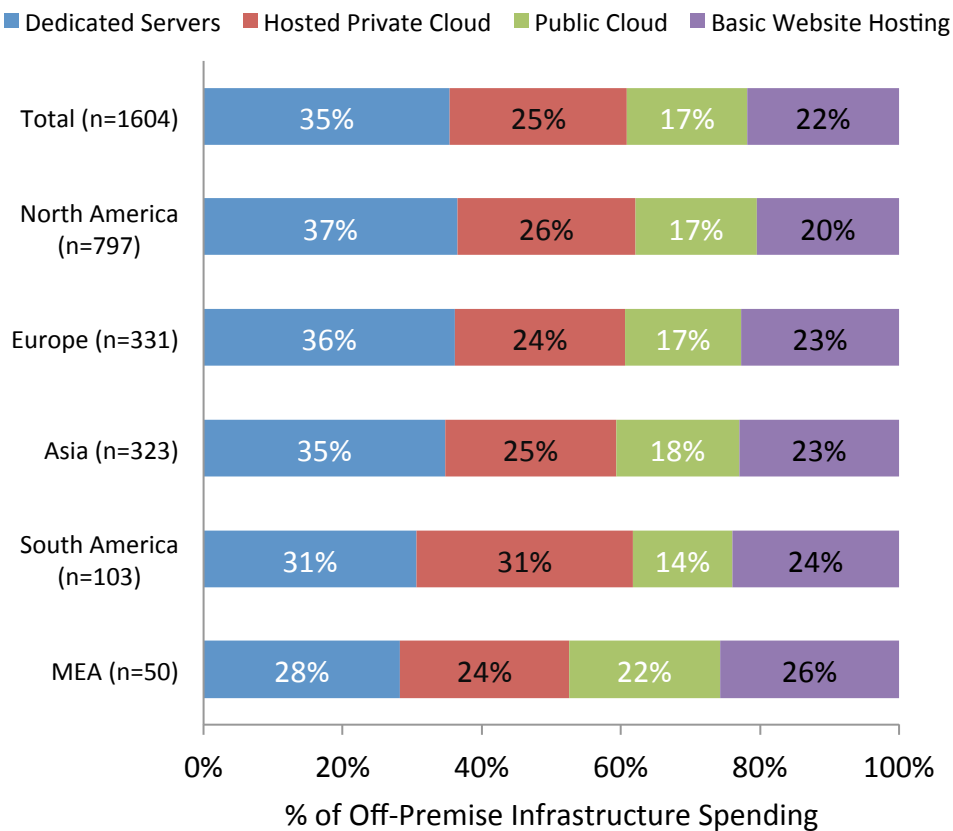
Infrastructure Spending Off-Premise



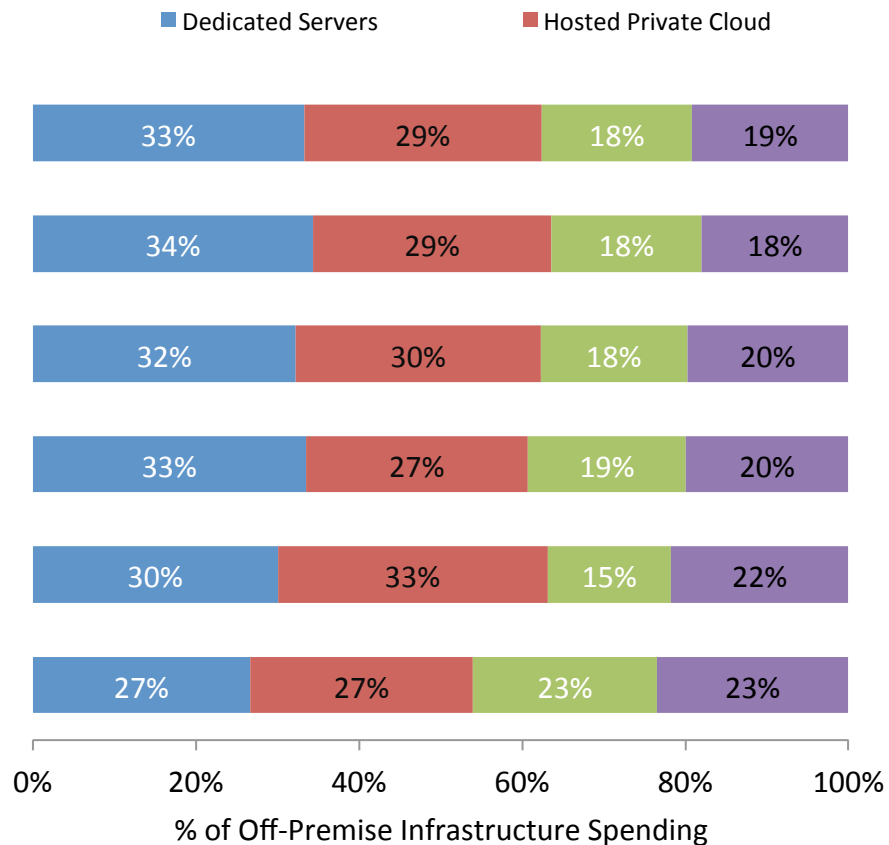
I1. Approximately, what percent of your current off premises hosted infrastructure spending is split across the following four deployment models? [Sum to 100]
I2. In two years approximately what percent of your off premises hosted infrastructure spending will be split across the following four deployment models? [Sum to 100%]

Current versus Future Off-Premise Spending by Region

Current Off-Premise Infrastructure Spending



Future Off-Premise Infrastructure Spending

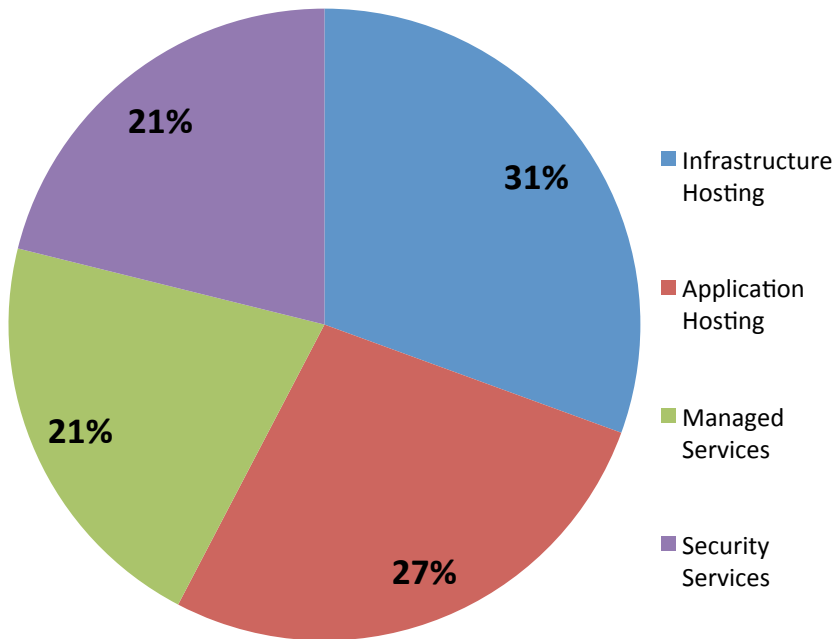


I1. Approximately, what percent of your current off premises hosted infrastructure spending is split across the following four deployment models? [Sum to 100]

I2. In two years approximately what percent of your off premises hosted infrastructure spending will be split across the following four deployment models? [Sum to 100%]

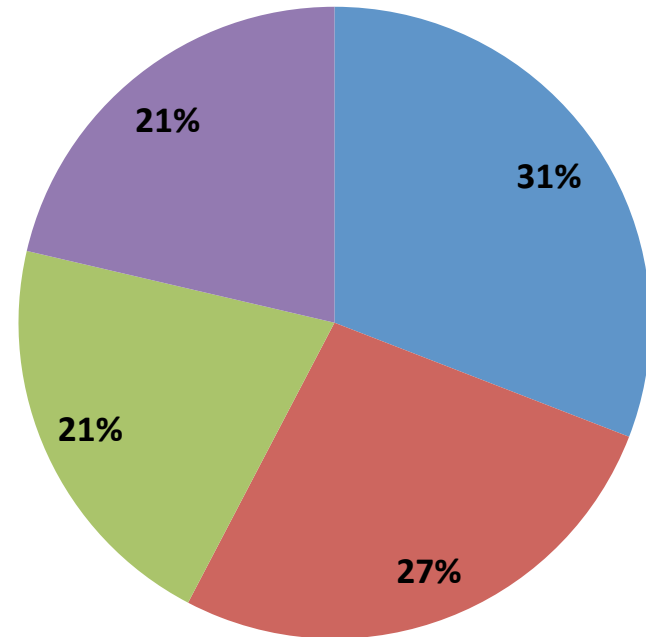
Hosting Budget by Services Type: Today and in Two Years

Current % Hosting/Cloud Services Budget Allocation



n=1600

Future % Hosting/Cloud Services Budget Allocation



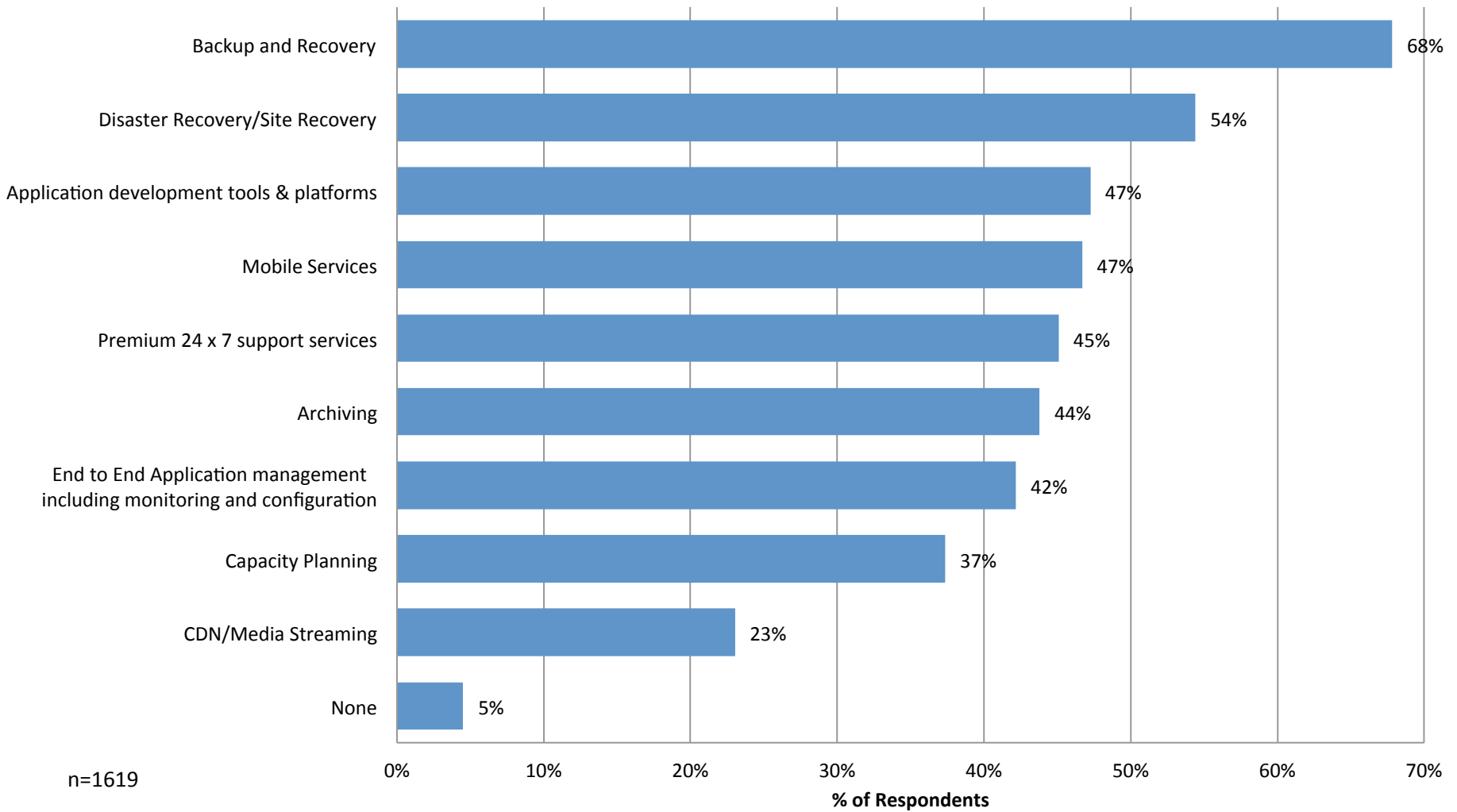
n=1593

H2. Approximately what percent of your HOSTING & CLOUD SERVICES budget in 2015 is allocated to the following services? [Sum to 100]

H3. Now thinking out two years, approximately what percent of your HOSTING & CLOUD SERVICES budget will be allocated to the following services? [Sum to 100%]

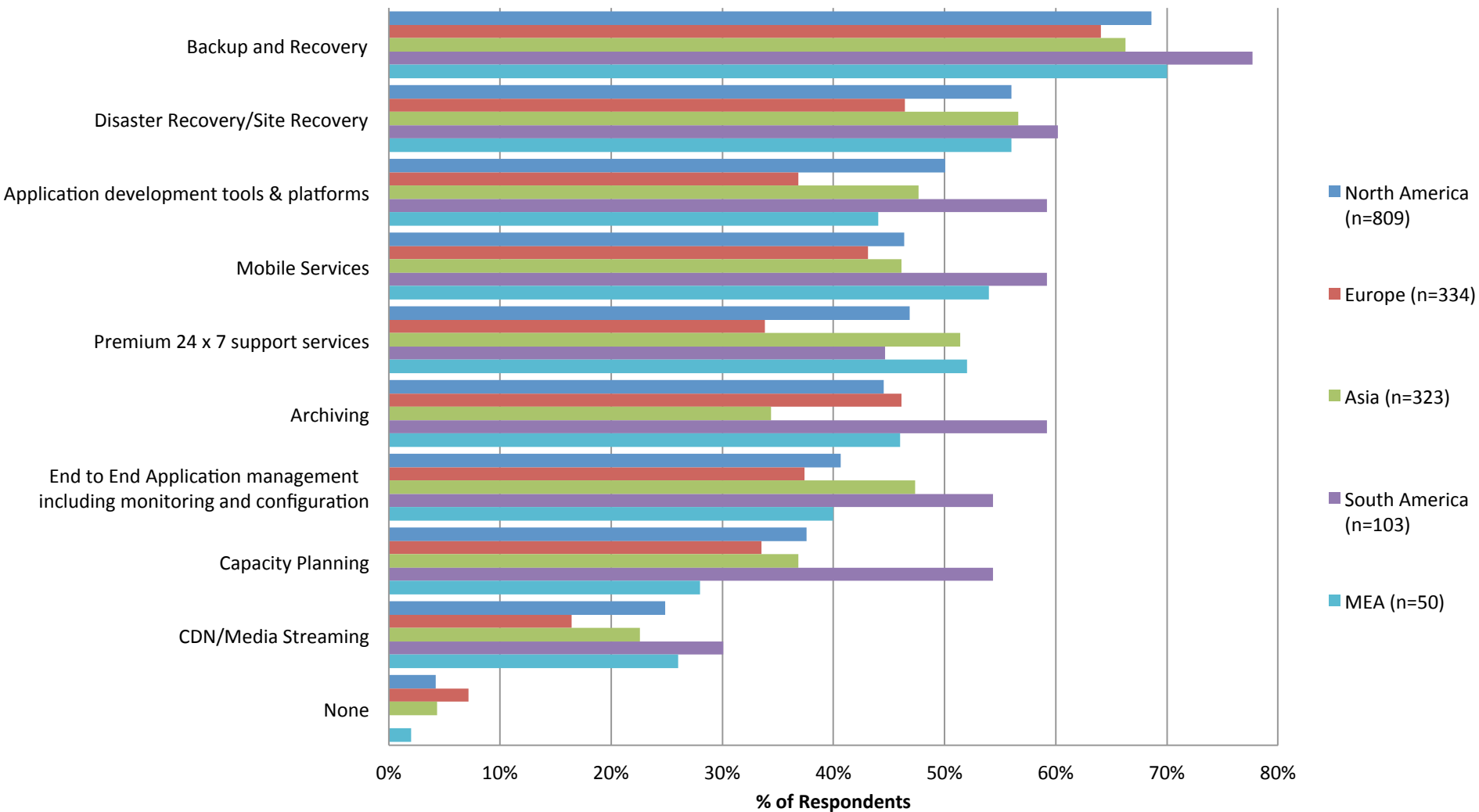
MANAGED SERVICES

Managed Services: Spending Over Next Two Years



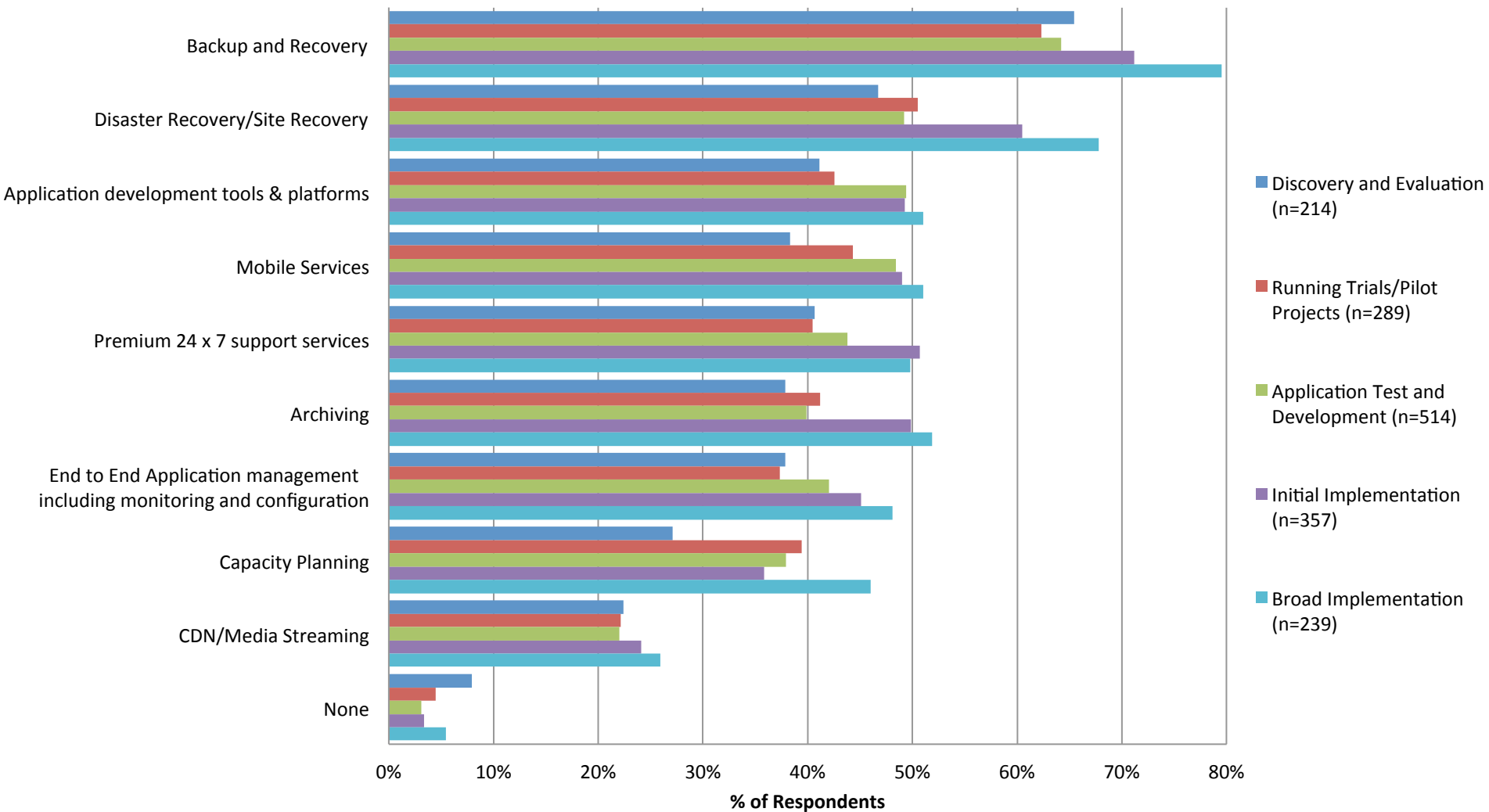
M1. Which of the following managed services –if any -- will comprise a significant portion of your Managed Services spending with hosting & cloud providers over the next two years?

Managed Services: Spending by Region Over Next Two Years



M1. Which of the following managed services –if any -- will comprise a significant portion of your Managed Services spending with hosting & cloud providers over the next two years?

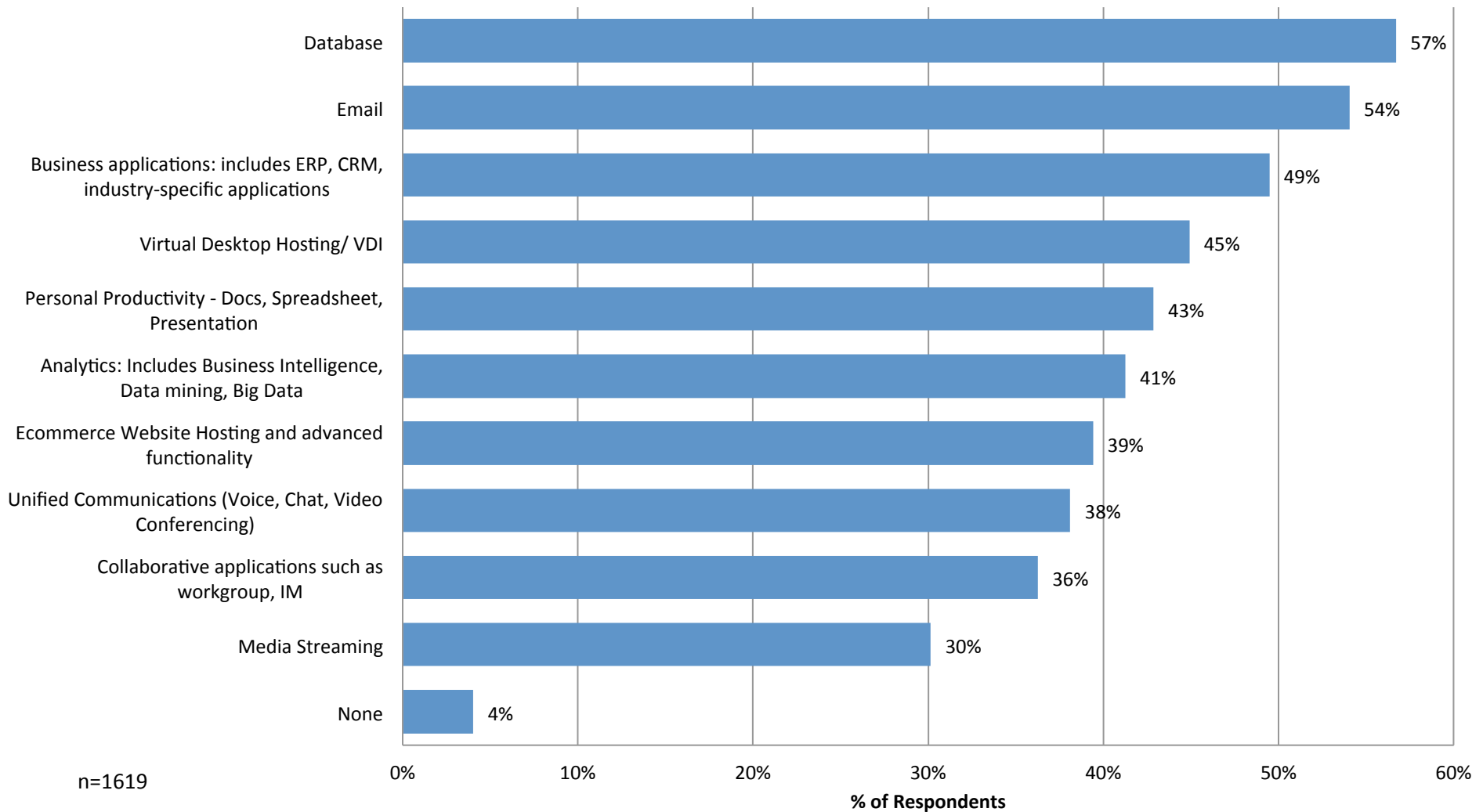
Managed Services: Spending by Maturity Over Next Two Years



M1. Which of the following managed services –if any -- will comprise a significant portion of your Managed Services spending with hosting & cloud providers over the next two years?

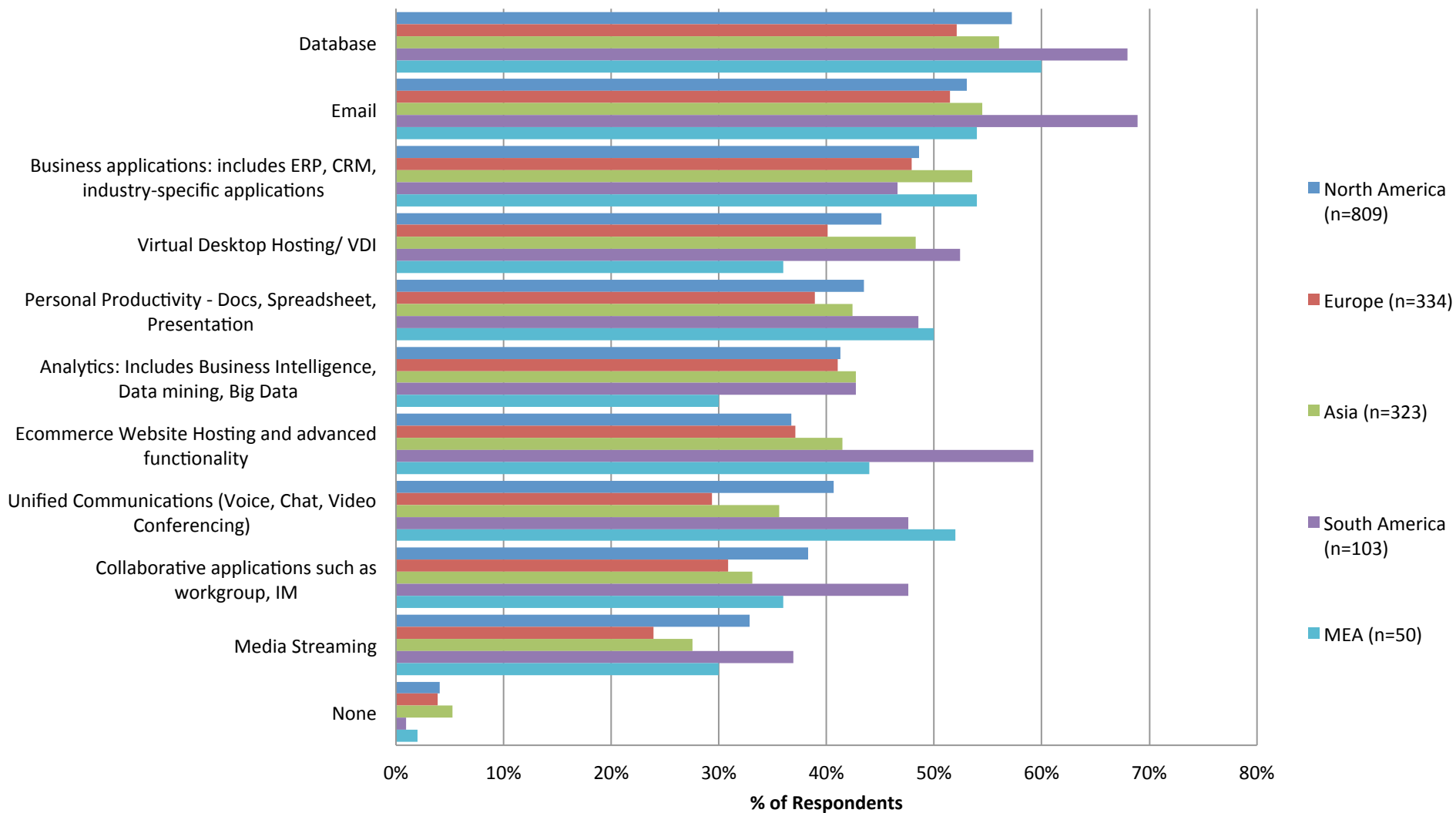
APPLICATION HOSTING

Application Hosting: Spending Over Next Two Years



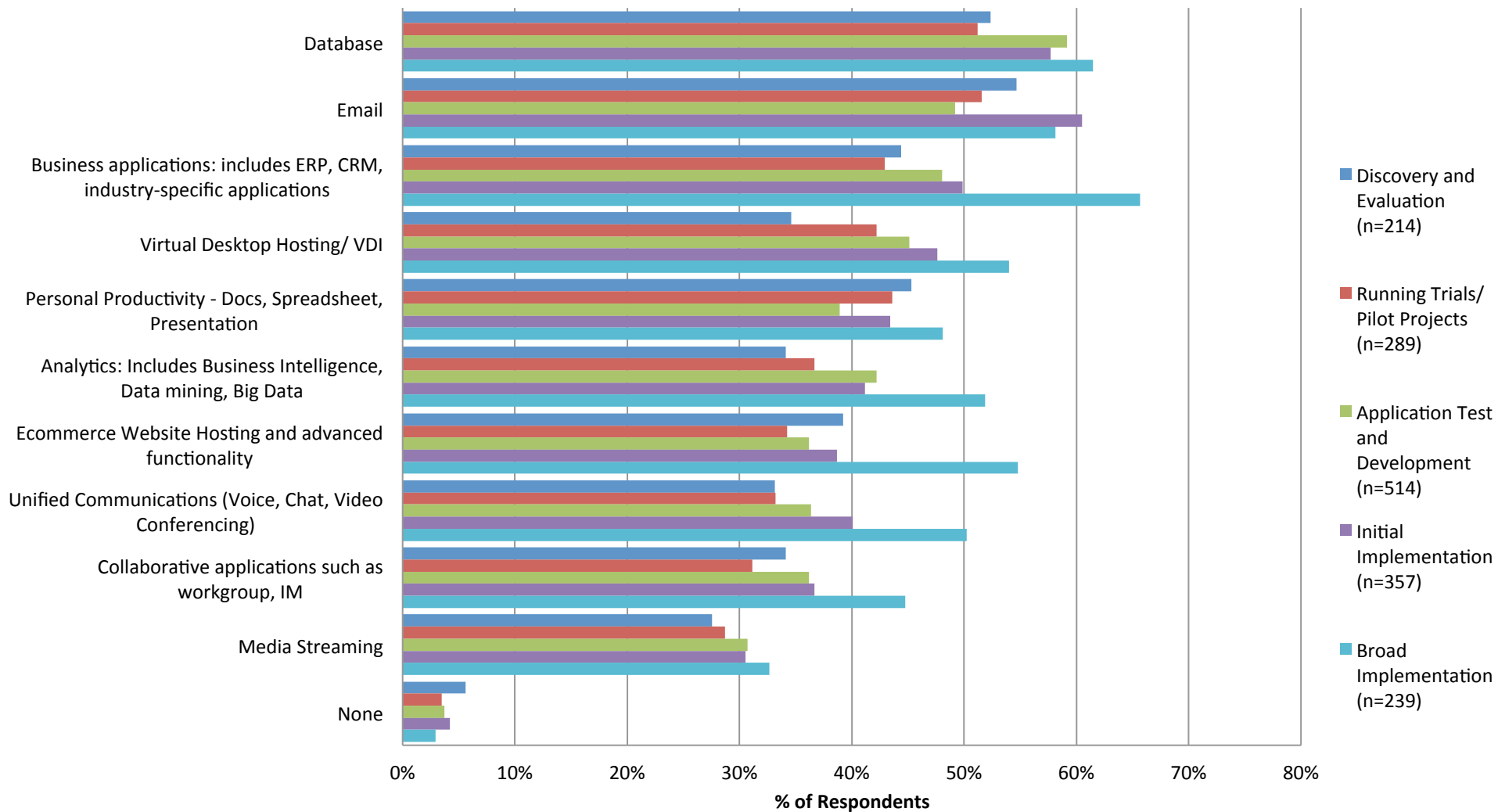
A1. Which of the following hosted applications – if any -- will comprise a significant portion of your Application Hosting spending with hosting & cloud providers over the next two years?

Application Hosting: Spending by Region Over Next Two Years



A1. Which of the following hosted applications – if any -- will comprise a significant portion of your Application Hosting spending with hosting & cloud providers over the next two years?

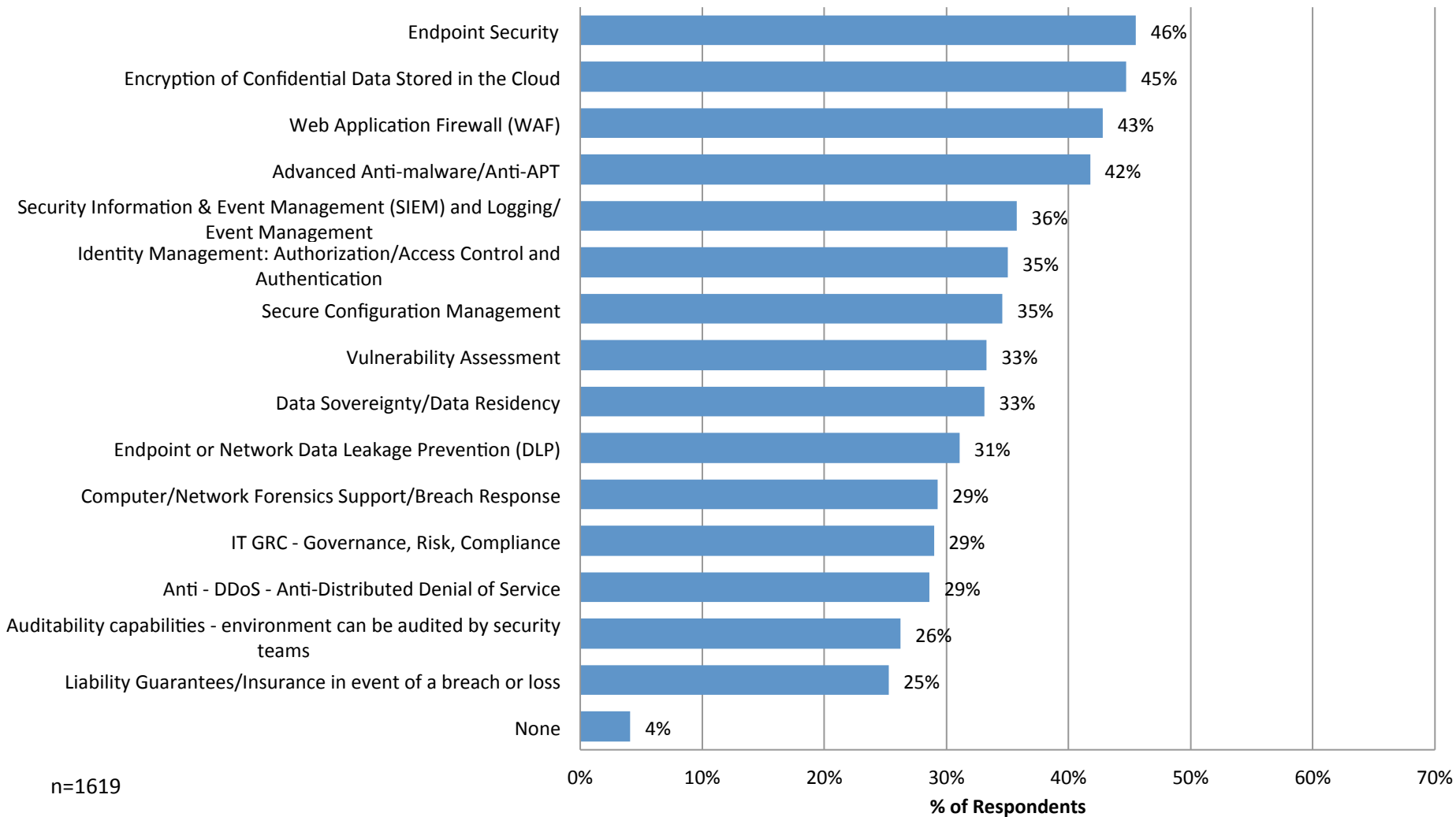
Application Hosting: Spending by Maturity Over Next Two Years



A1. Which of the following hosted applications – if any -- will comprise a significant portion of your Application Hosting spending with hosting & cloud providers over the next two years?

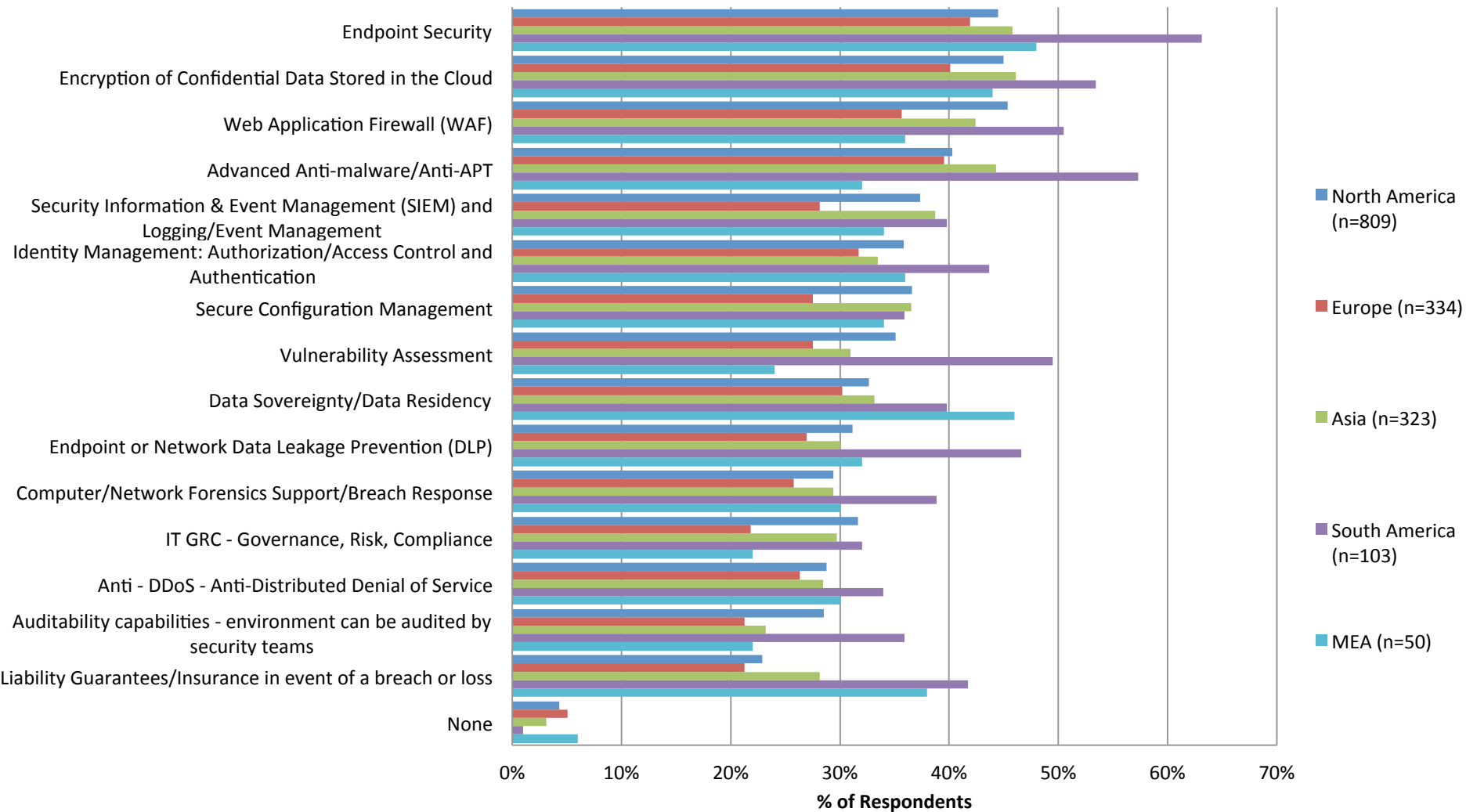
SECURITY SERVICES

Security Services: Spending Over Next Two Years



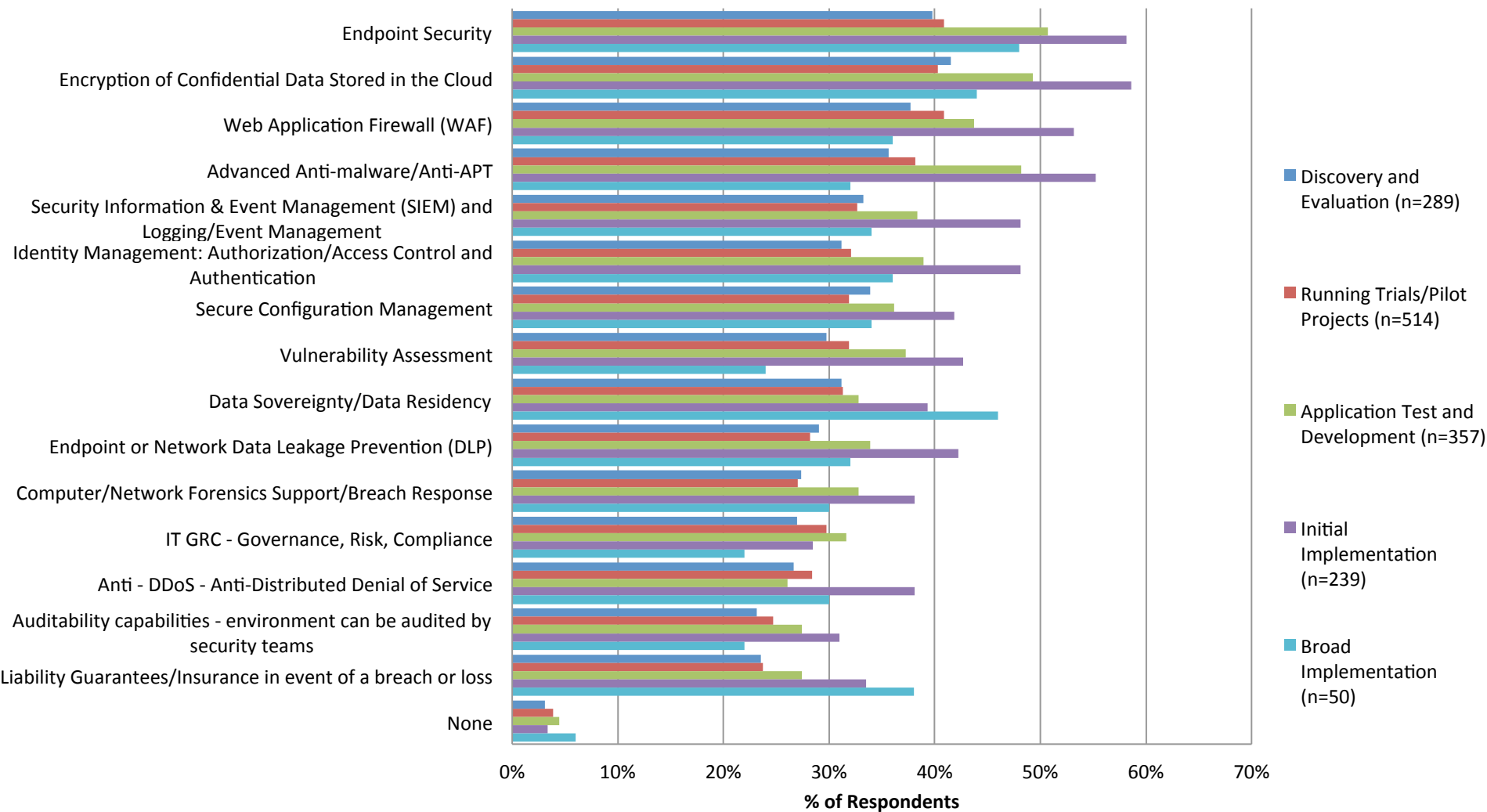
E1. Which of the following security services – if any -- will comprise a significant portion of your Security Services spending with hosting and cloud providers over the next two years?

Security Services: Spending by Region Over Next Two Years



E1. Which of the following security services – if any -- will comprise a significant portion of your Security Services spending with hosting and cloud providers over the next two years?

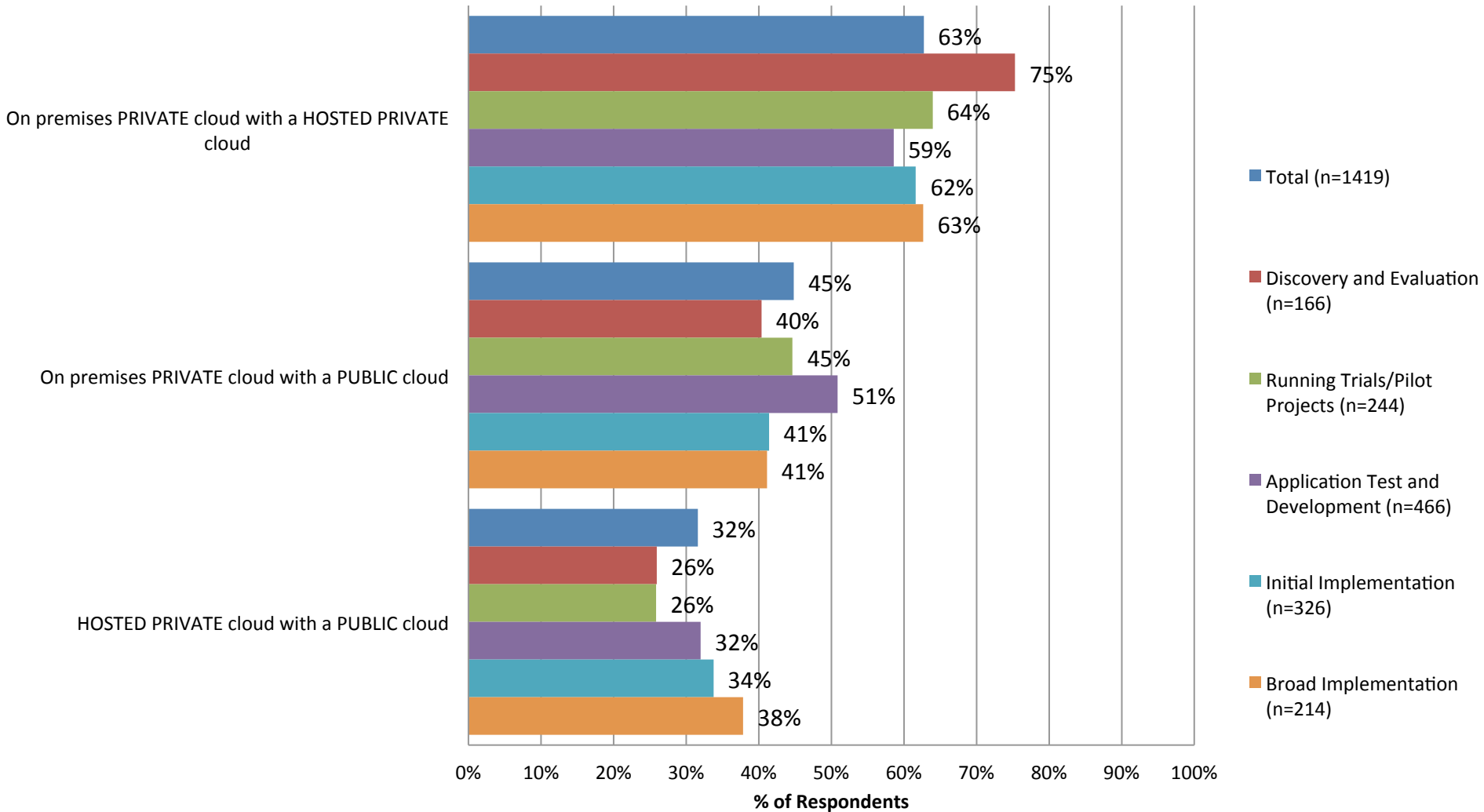
Security Services: Spending by Maturity Over Next Two Years



E1. Which of the following security services – if any -- will comprise a significant portion of your Security Services spending with hosting and cloud providers over the next two years?

HYBRID CLOUD

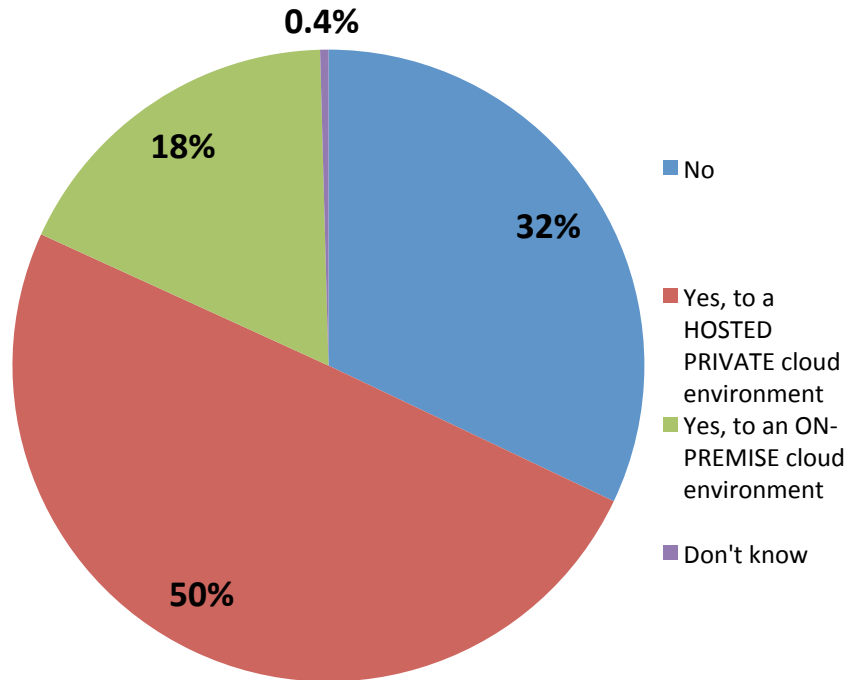
Hybrid Cloud: Interoperability by Maturity



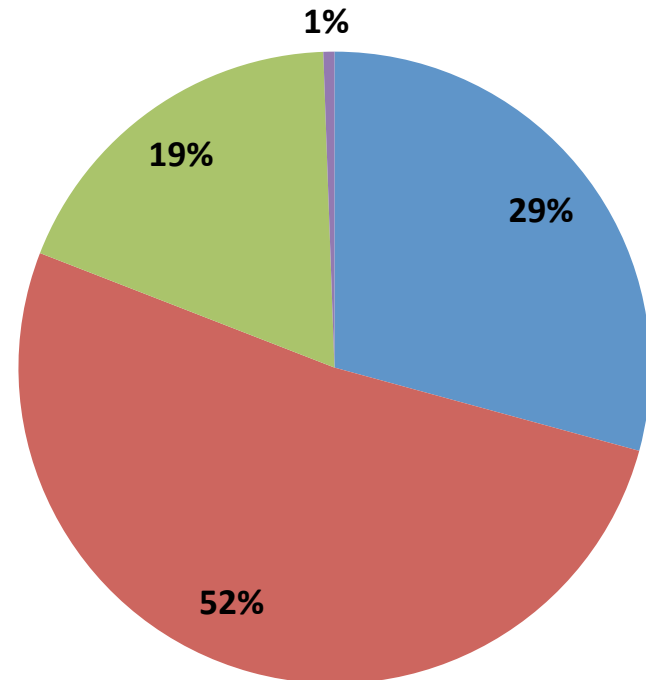
16. Has your organization configured any of the following clouds for interoperability for the seamless delivery of a business functions? Check all that apply

Hybrid Cloud Migration by Type

Current Public to Private Cloud Migration



Future Public to Private Cloud Migration



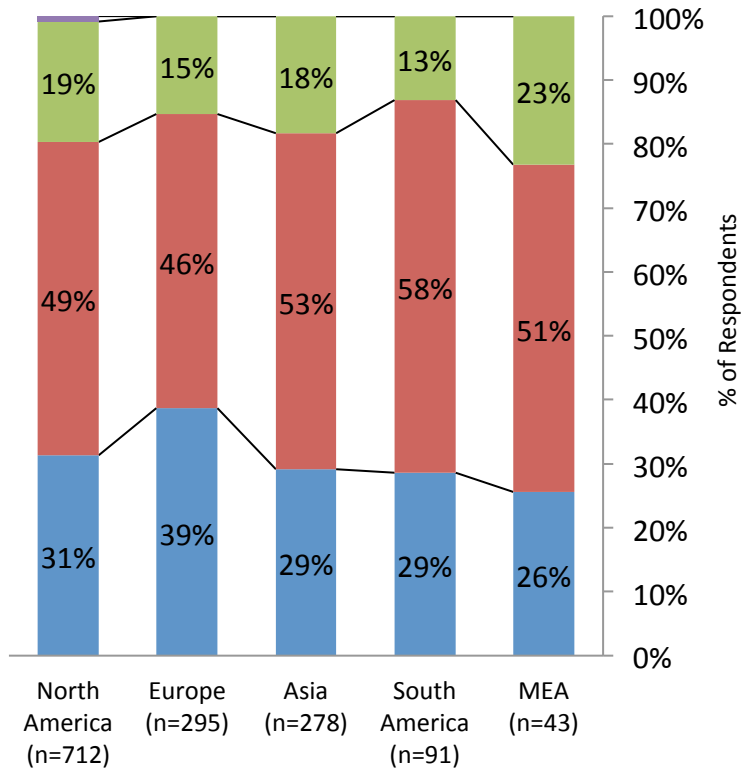
n=1419

17. Has your organization migrated any applications or data that were primarily part of a PUBLIC cloud environment to a PRIVATE cloud environment

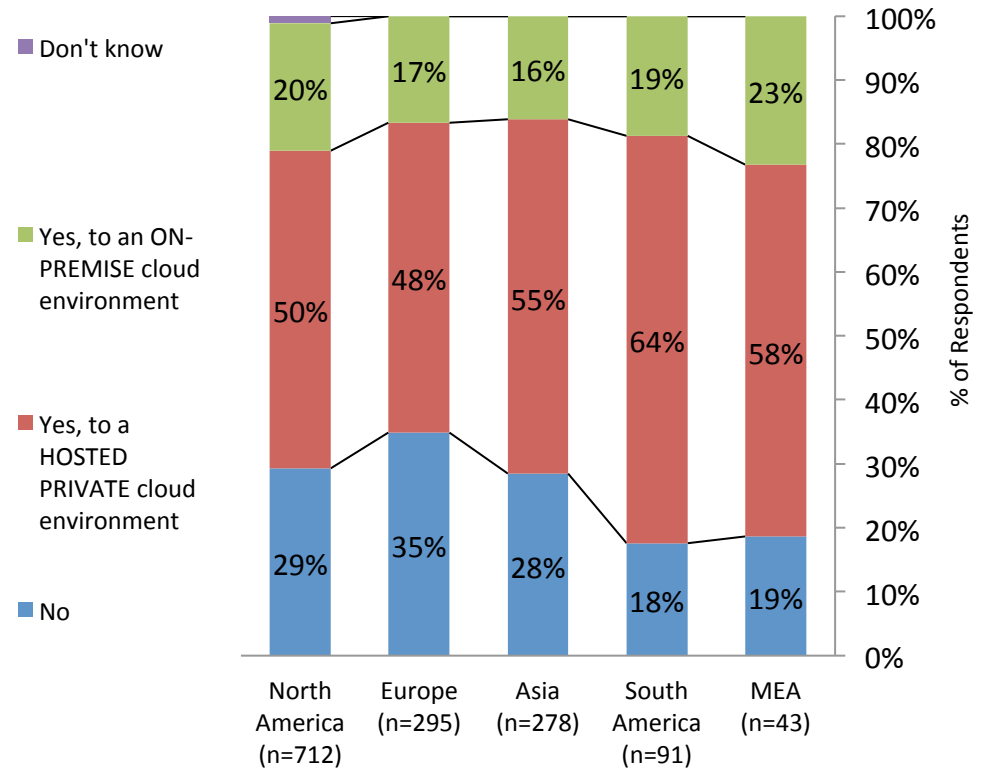
18. Does your organization plan to migrate any applications or data that were primarily part of a PUBLIC cloud environment to a PRIVATE cloud environment over the next year?

Hybrid Cloud Migration by Type and Region

Current Public to Private Cloud Migration by Region



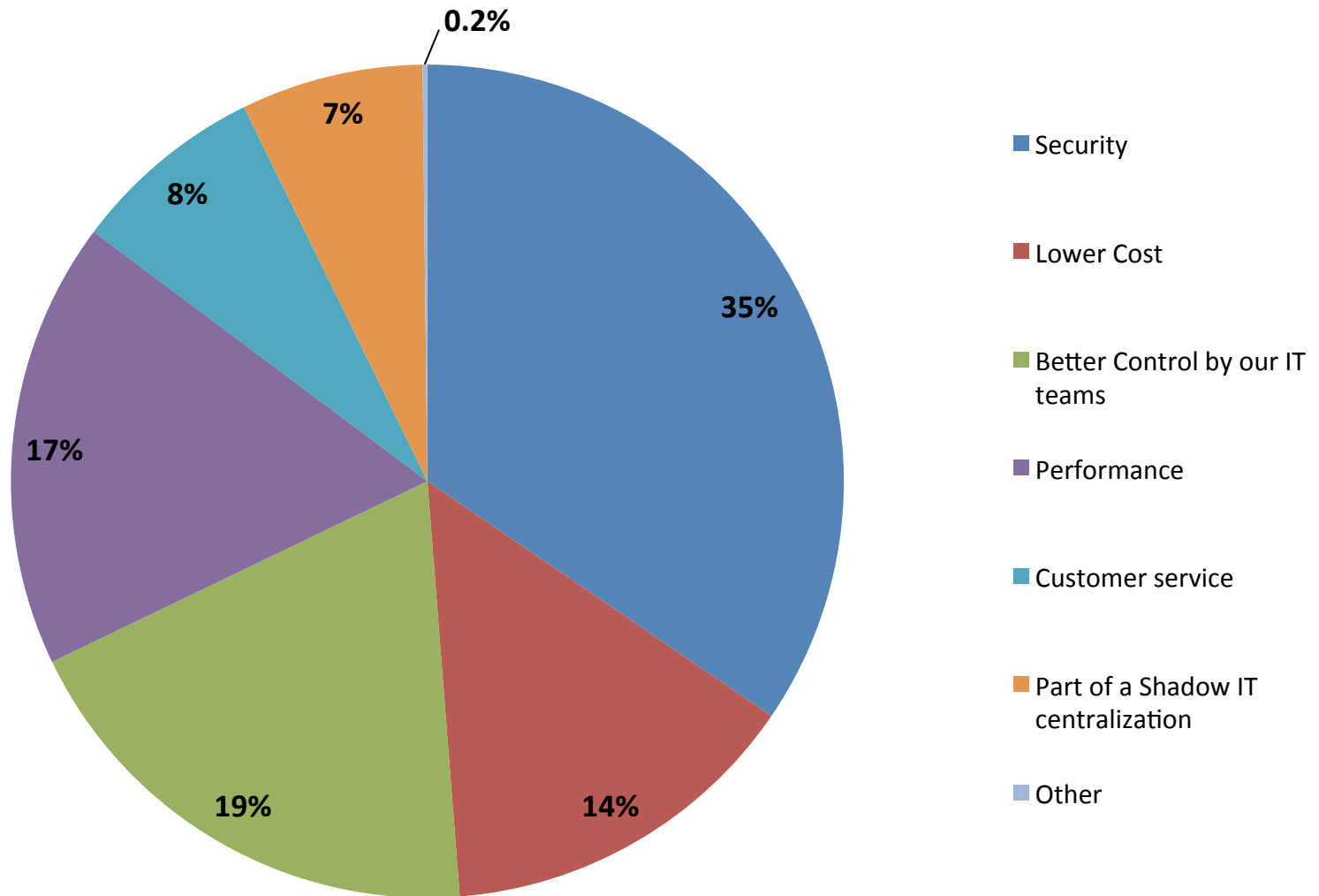
Future Public to Private Cloud Migration by Region



17. Has your organization migrated any applications or data that were primarily part of a PUBLIC cloud environment to a PRIVATE cloud environment

18. Does your organization plan to migrate any applications or data that were primarily part of a PUBLIC cloud environment to a PRIVATE cloud environment over the next year?

Hybrid Cloud Migration Drivers

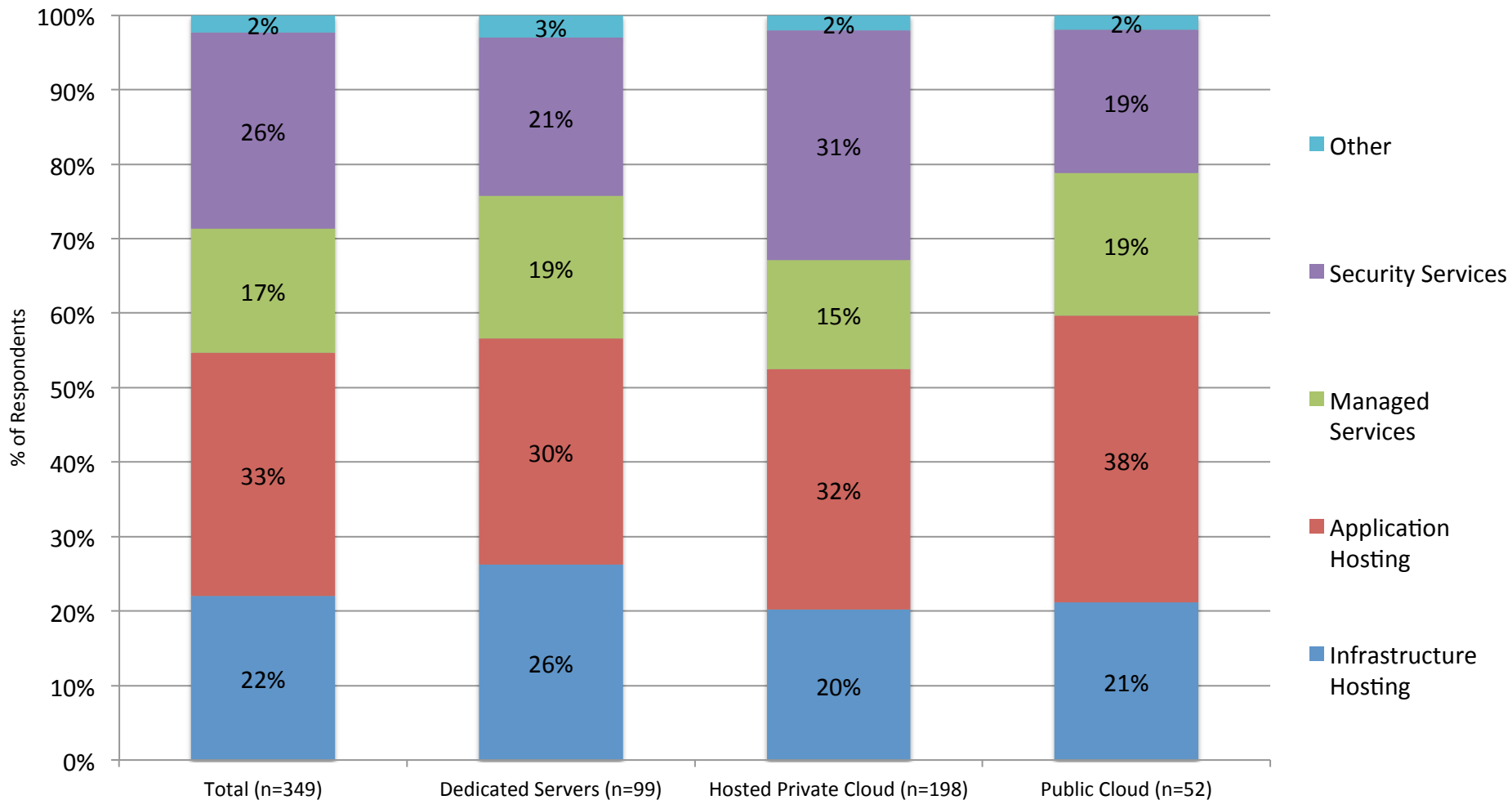


n=1089

19. What is the primary driver for migrating workloads from a PUBLIC to PRIVATE environment? (Select One)

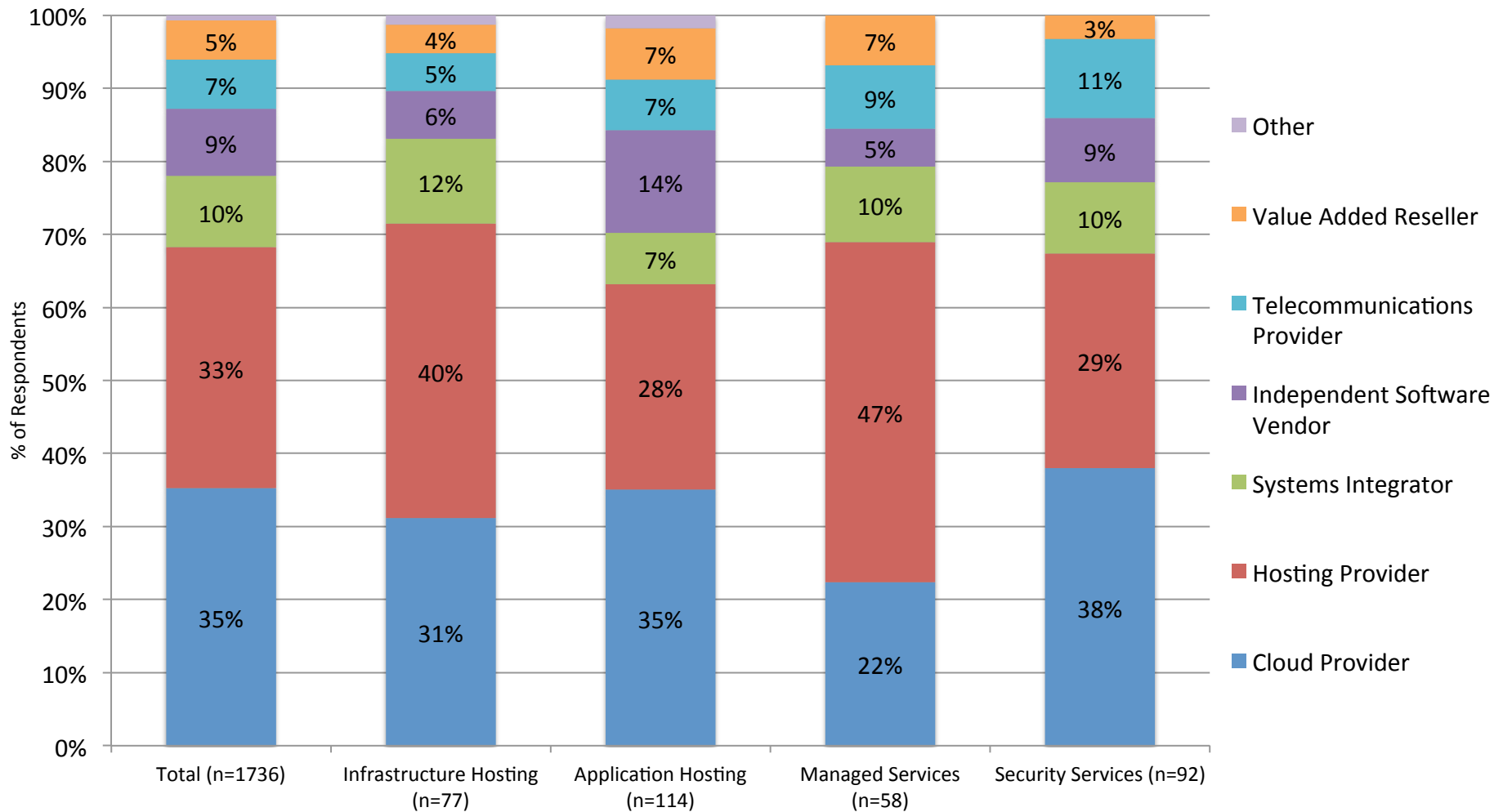
VENDOR SELECTION

Significant Hosting Project by Deployment Model



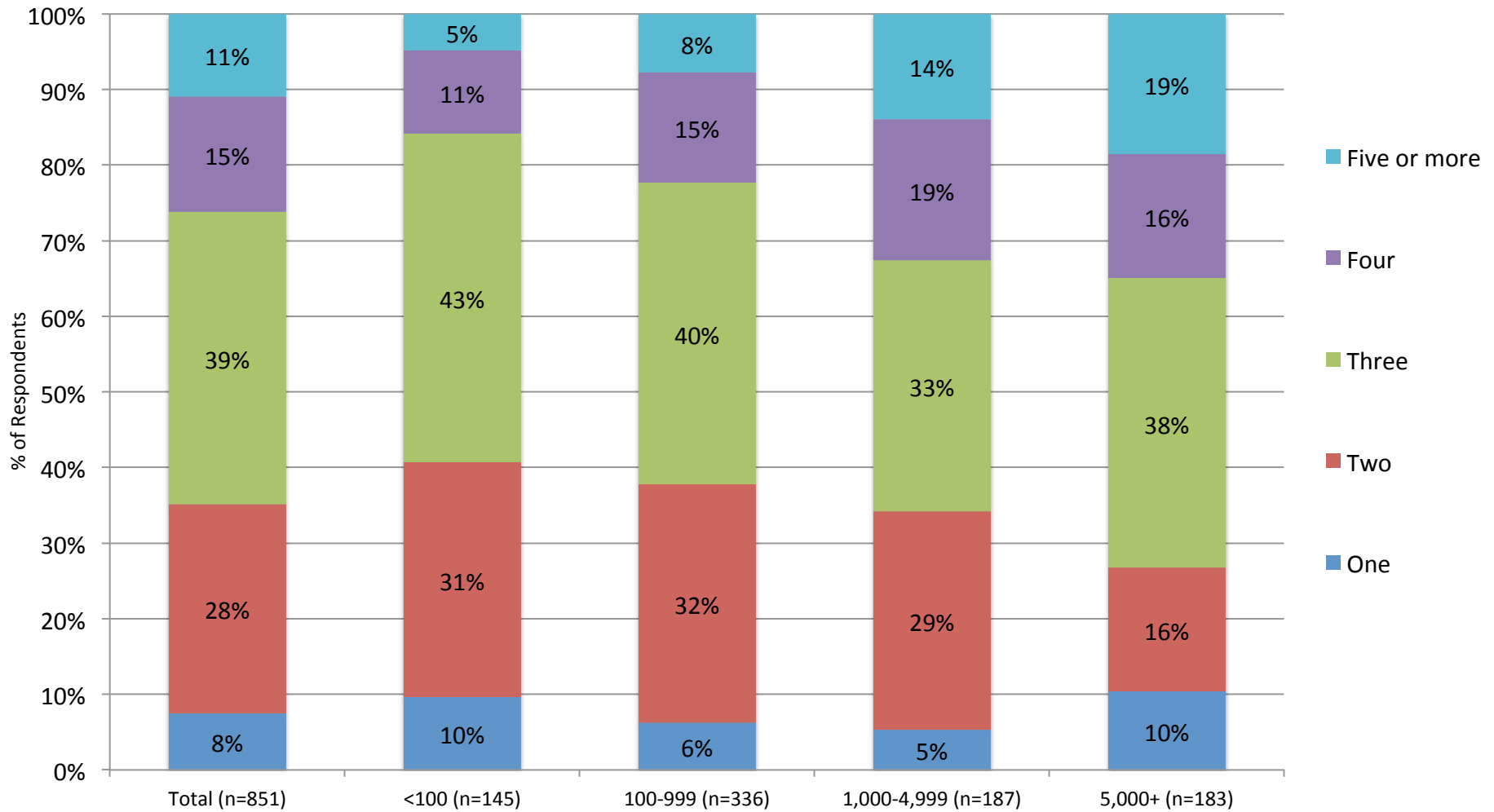
D2. What [will be/was] your most significant project or investment in hosting [be in the next year/recently?] [Check all that apply]

Significant Hosting Project by Vendor Type



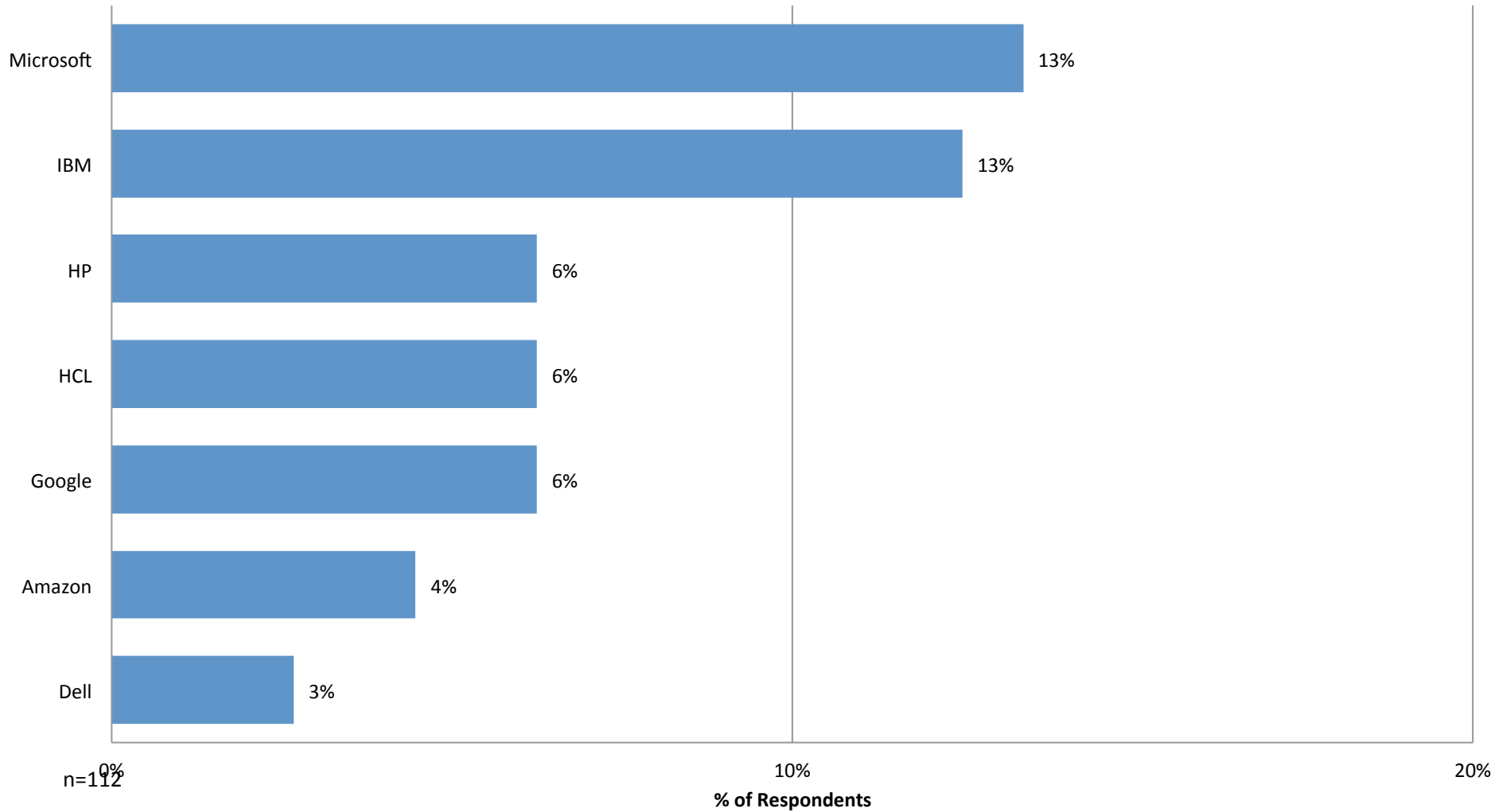
D4. How many service providers [do you expect to/did your organization] evaluate as part of the decision making process?

Number of Vendors Considered by Company Size



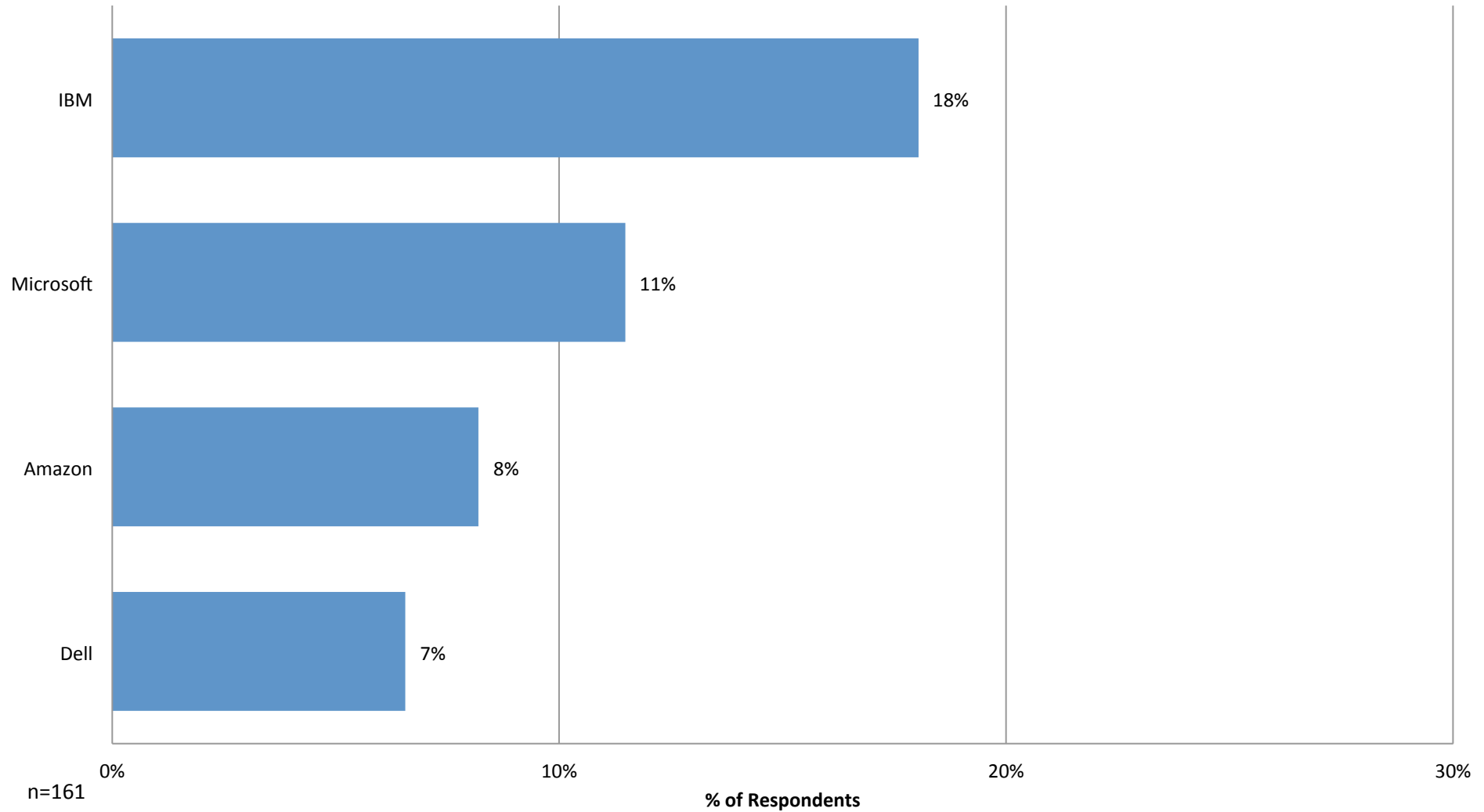
D5. Which type of vendor [is most likely to win/won] the business? (Choose one)

Significant Hosting Project: Top Mentioned ISVs



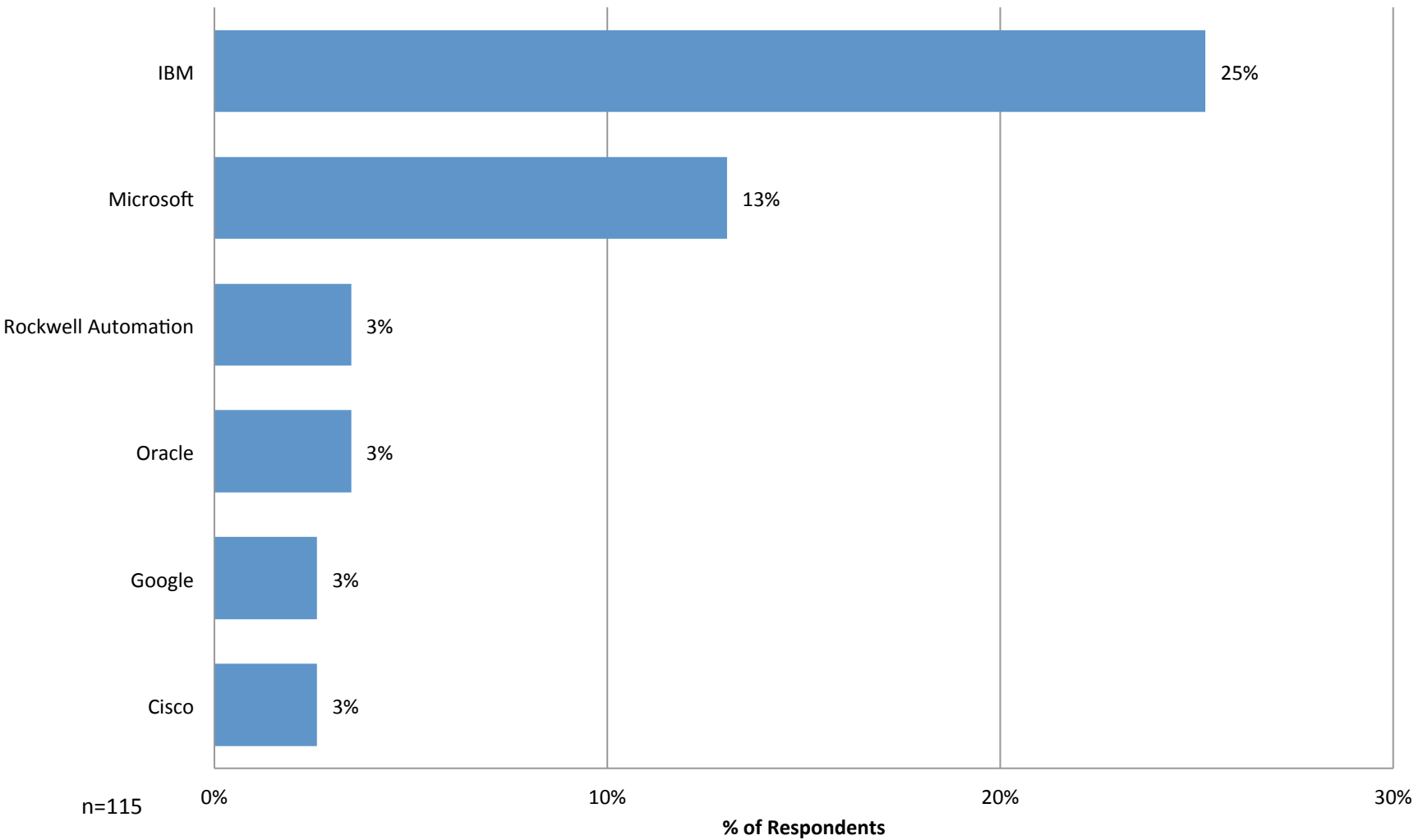
D6a. Which [Independent Software Vendor] [is most likely to win/won] the business: (open response)

Significant Hosting Project: Top Mentioned VARs



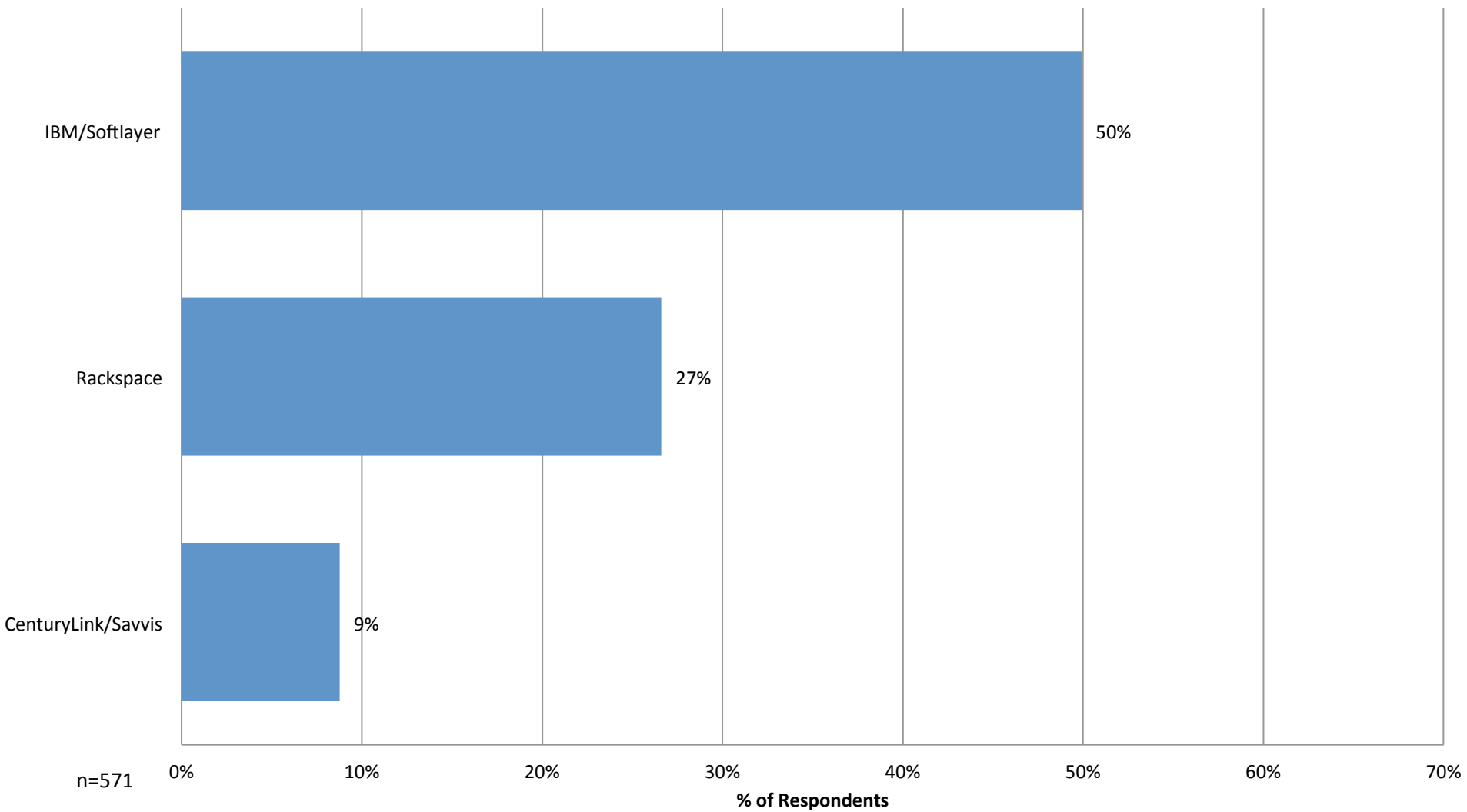
D6a. Which [Value Added Reseller] [is most likely to win/won] the business: (open response)

Significant Hosting Project: Top Mentioned SIs



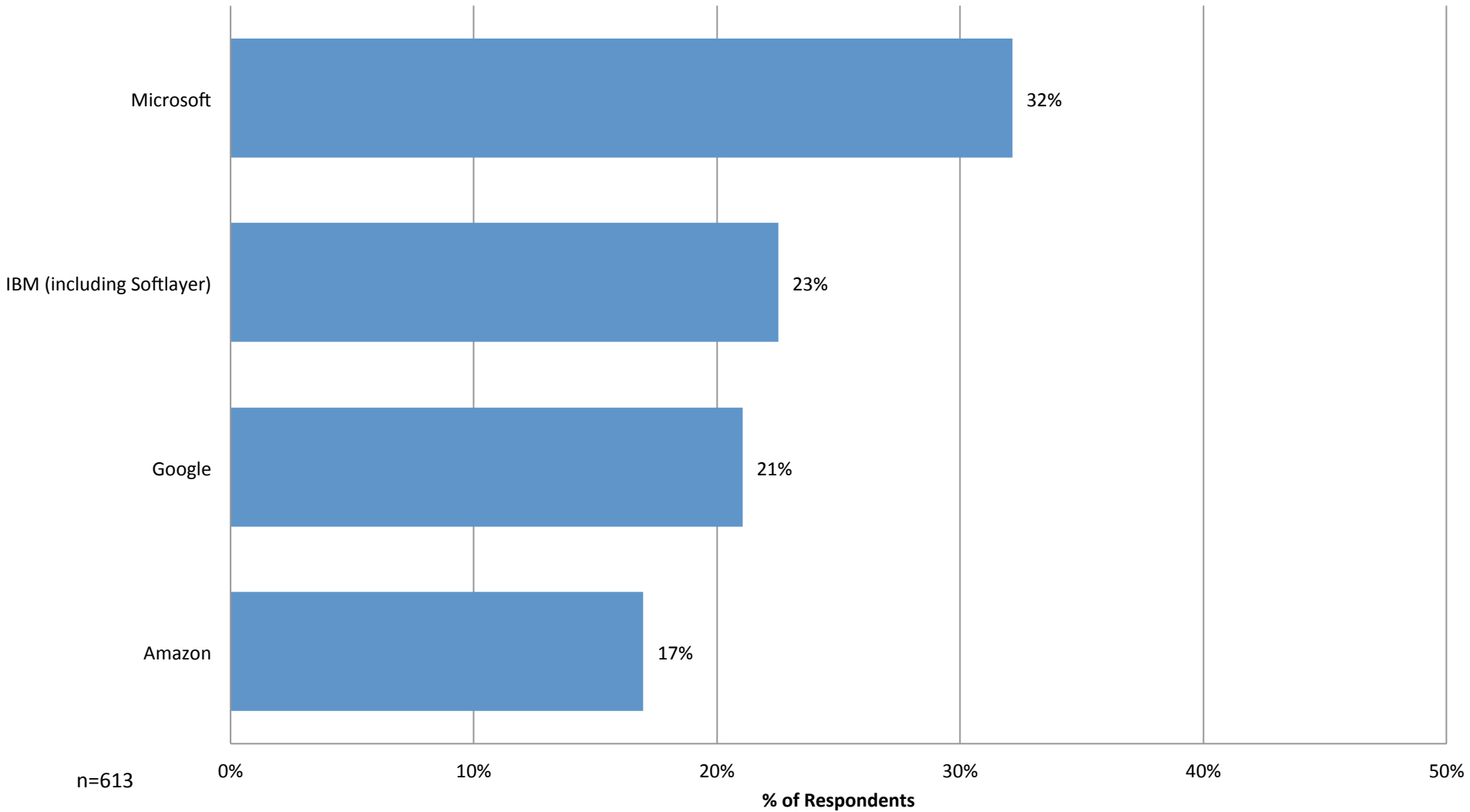
D6a. Which [System Integrator] [is most likely to win/won] the business: (open response)

Significant Hosting Project: Top Mentioned Hosting Providers



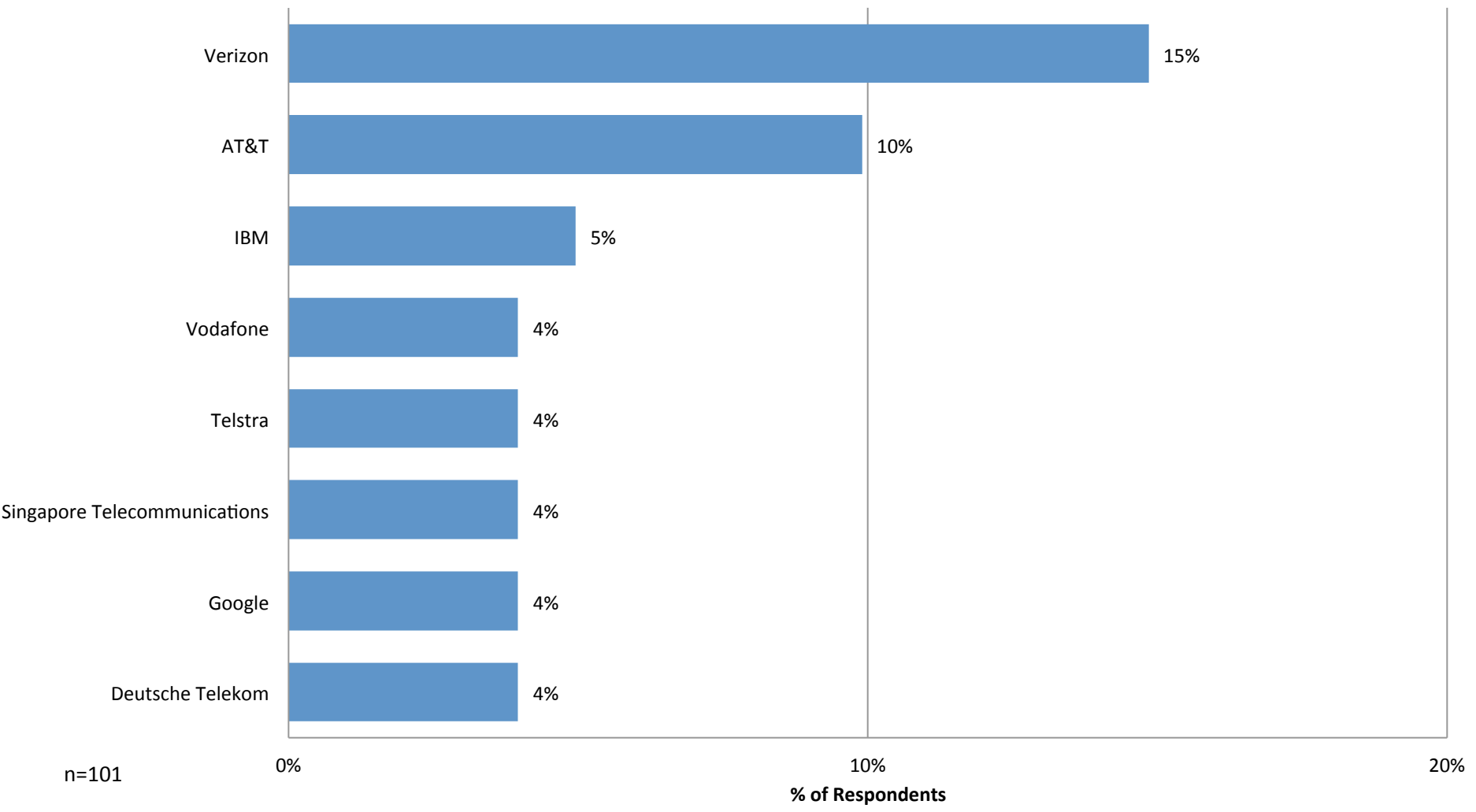
D6a. Which [Hosting Provider] [is most likely to win/won] the business: (open response)

Significant Hosting Project: Top Mentioned Cloud Providers



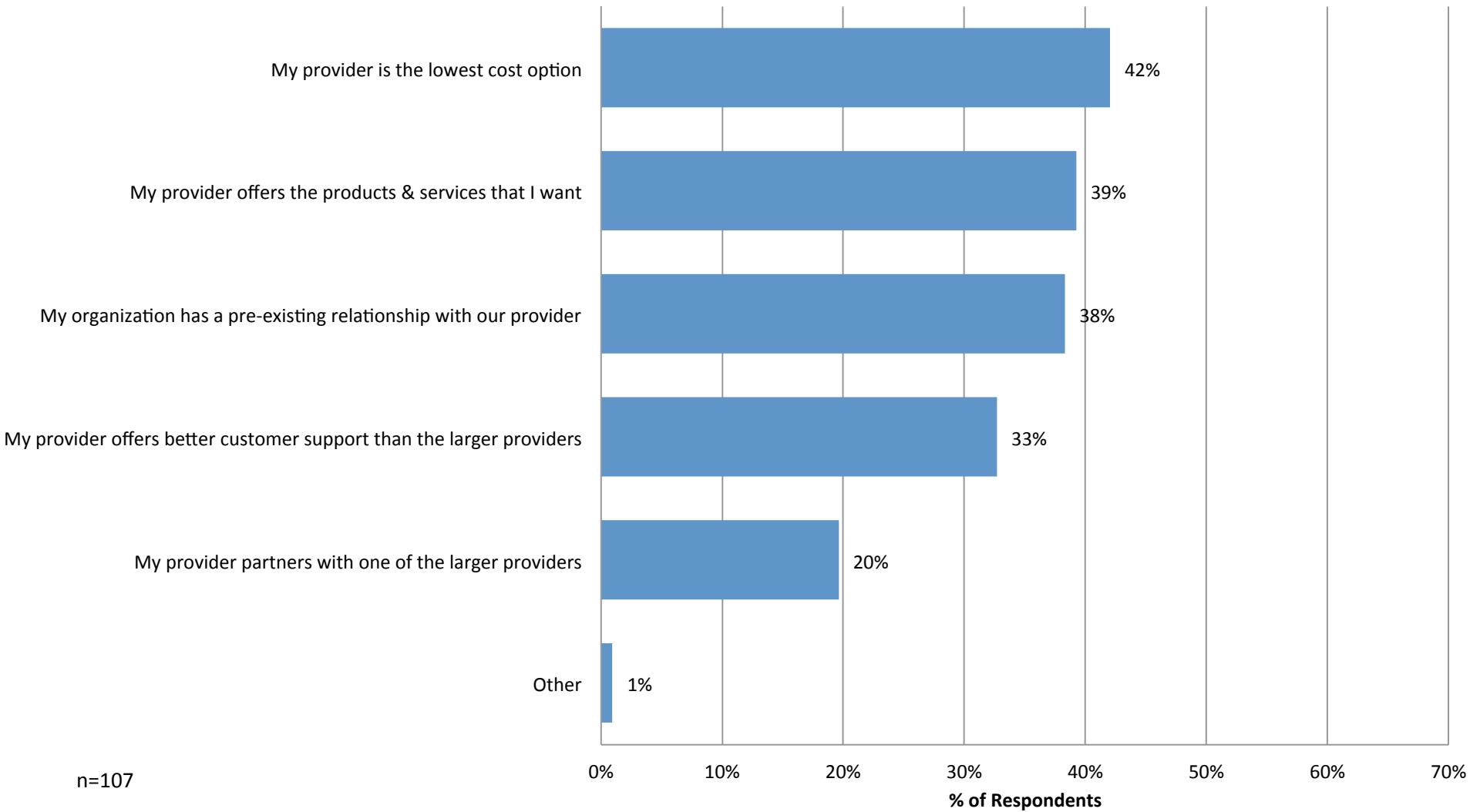
D6a. Which [Cloud Provider] [is most likely to win/won] the business: (open response)

Significant Hosting Project: Top Mentioned Telecommunication Providers



D6a. Which [Telecommunications Provider] [is most likely to win/won] the business: (open response)

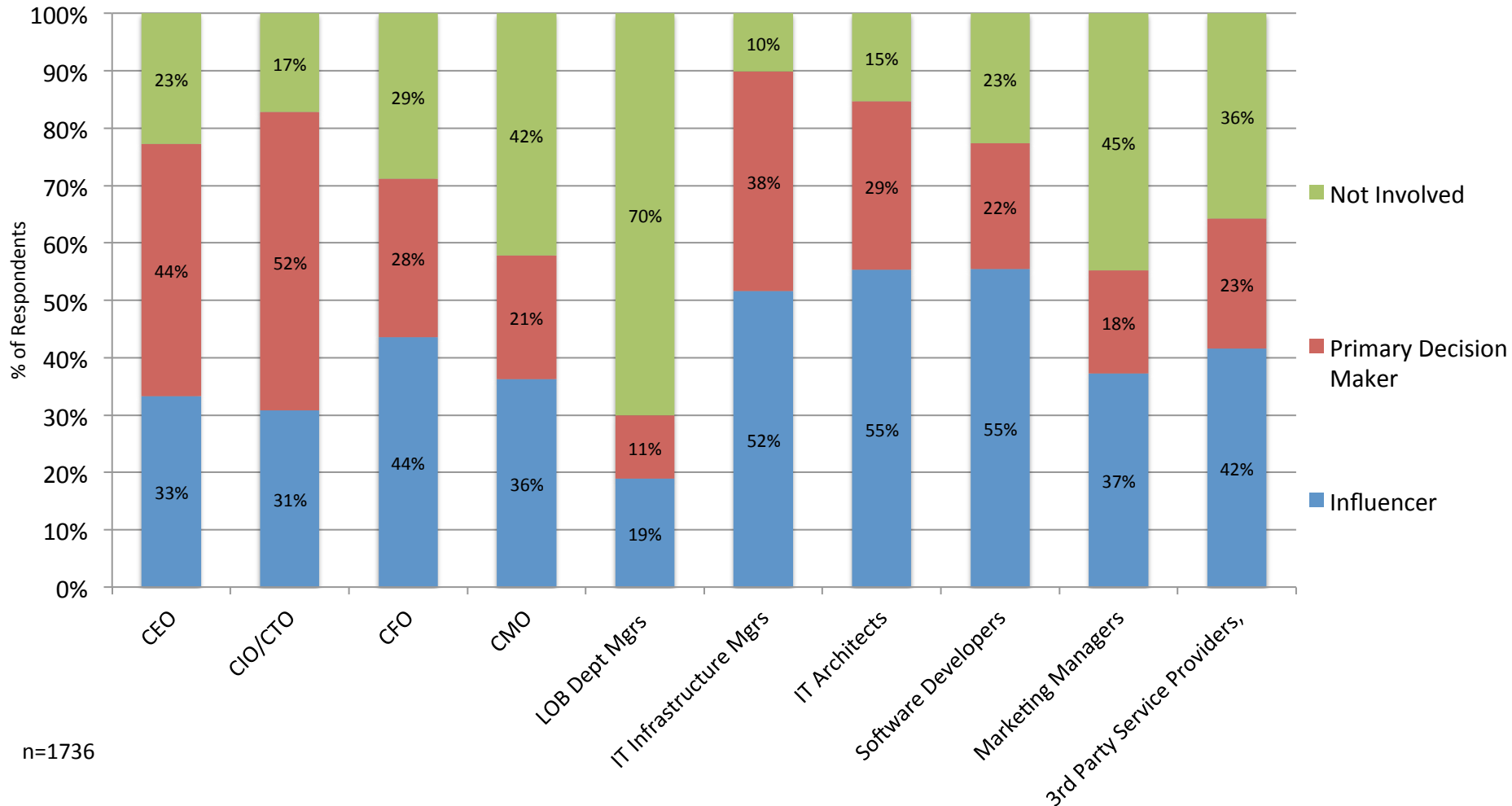
Significant Hosting Project: Drivers for Not Using Market Leading Vendor



D8. What are the top two reasons your company [will most likely not use/did not use] one of the larger market share leaders? (Choose up to two)

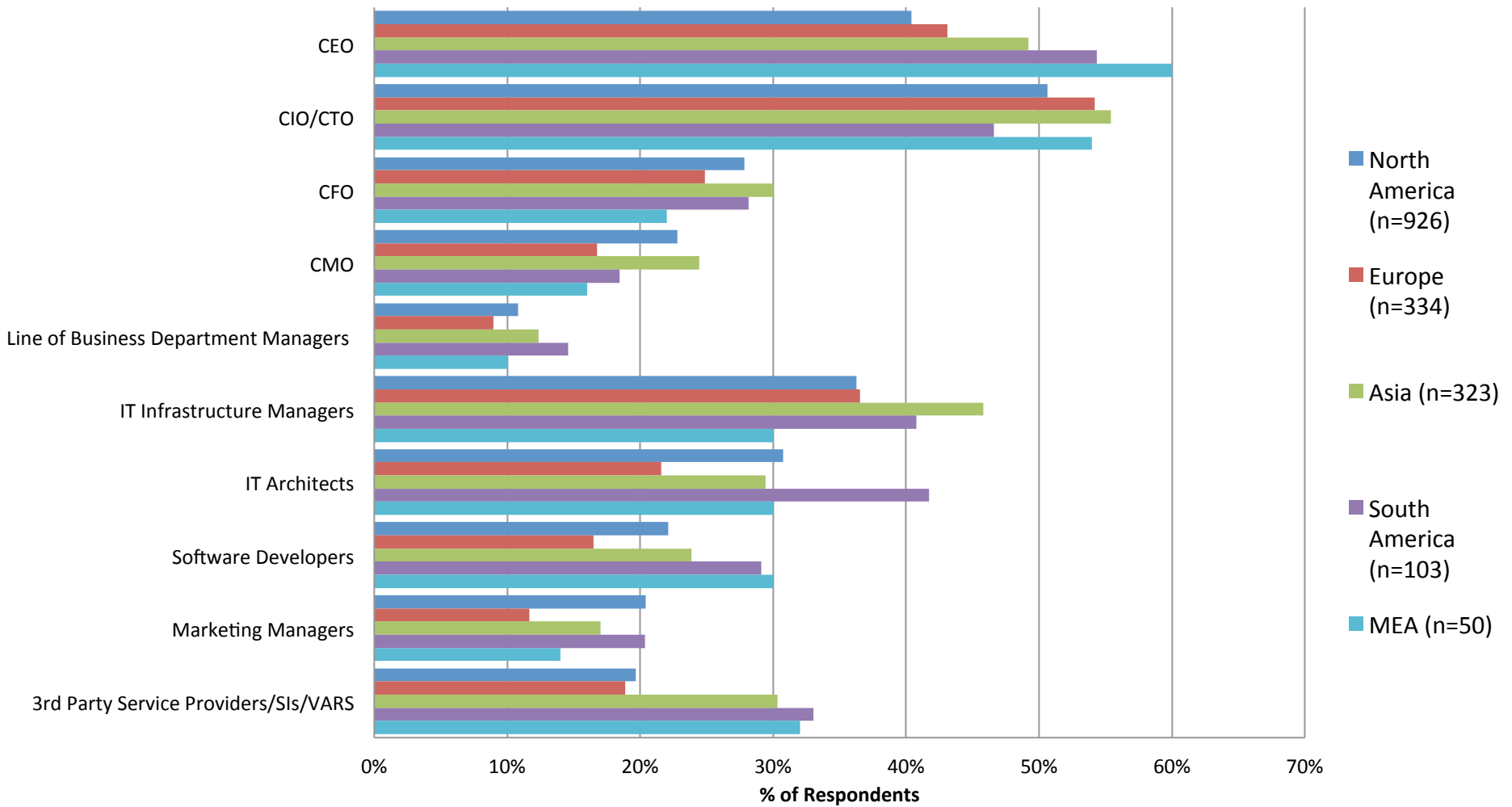
BUYING PROCESS

Stakeholder Decision Making Authority



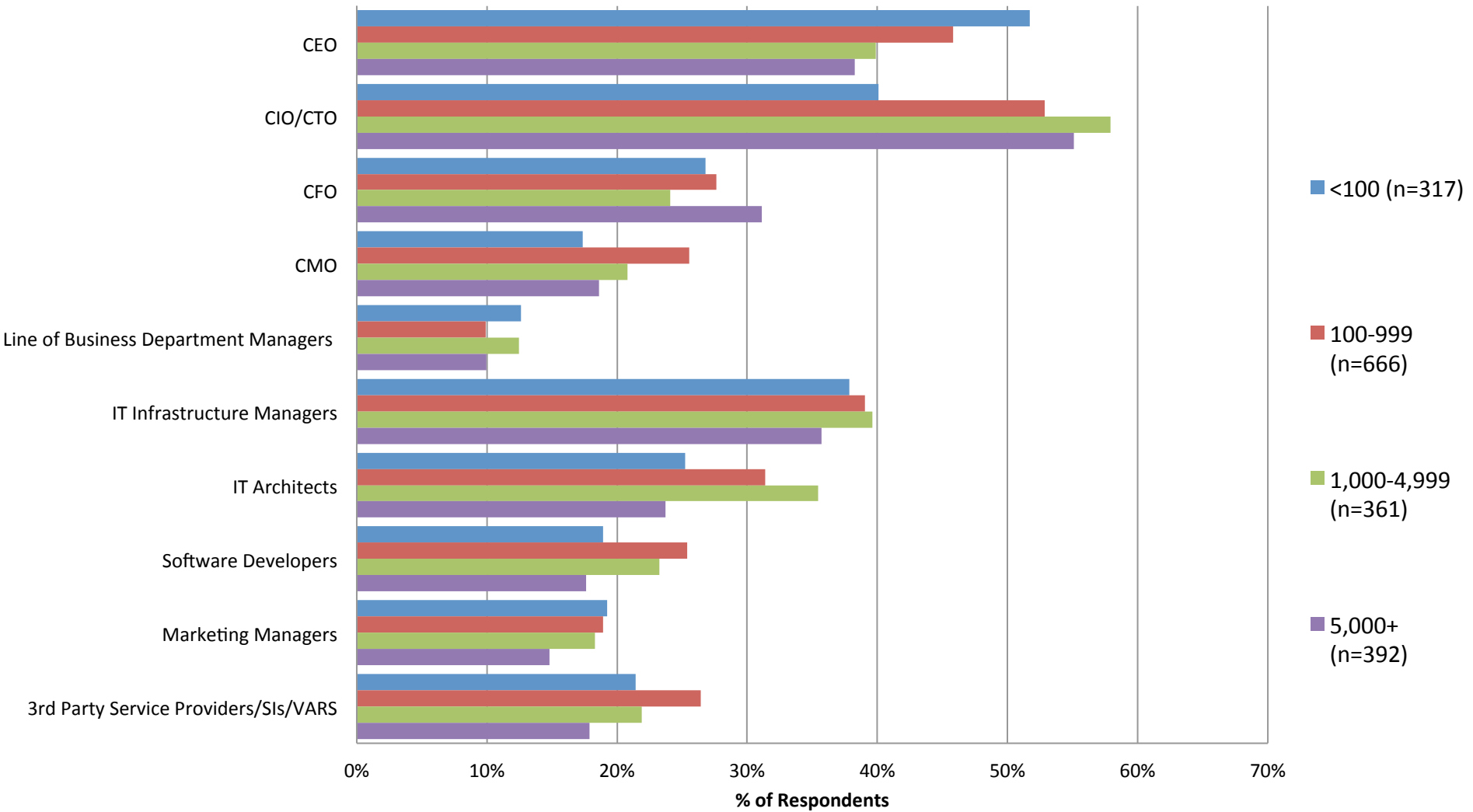
D9. When evaluating service providers for hosting and cloud services, describe the level of decision making authority each of the following stakeholders has at your organization. Think about the most significant projects or investments.

Stakeholder Decision Making Authority by Region



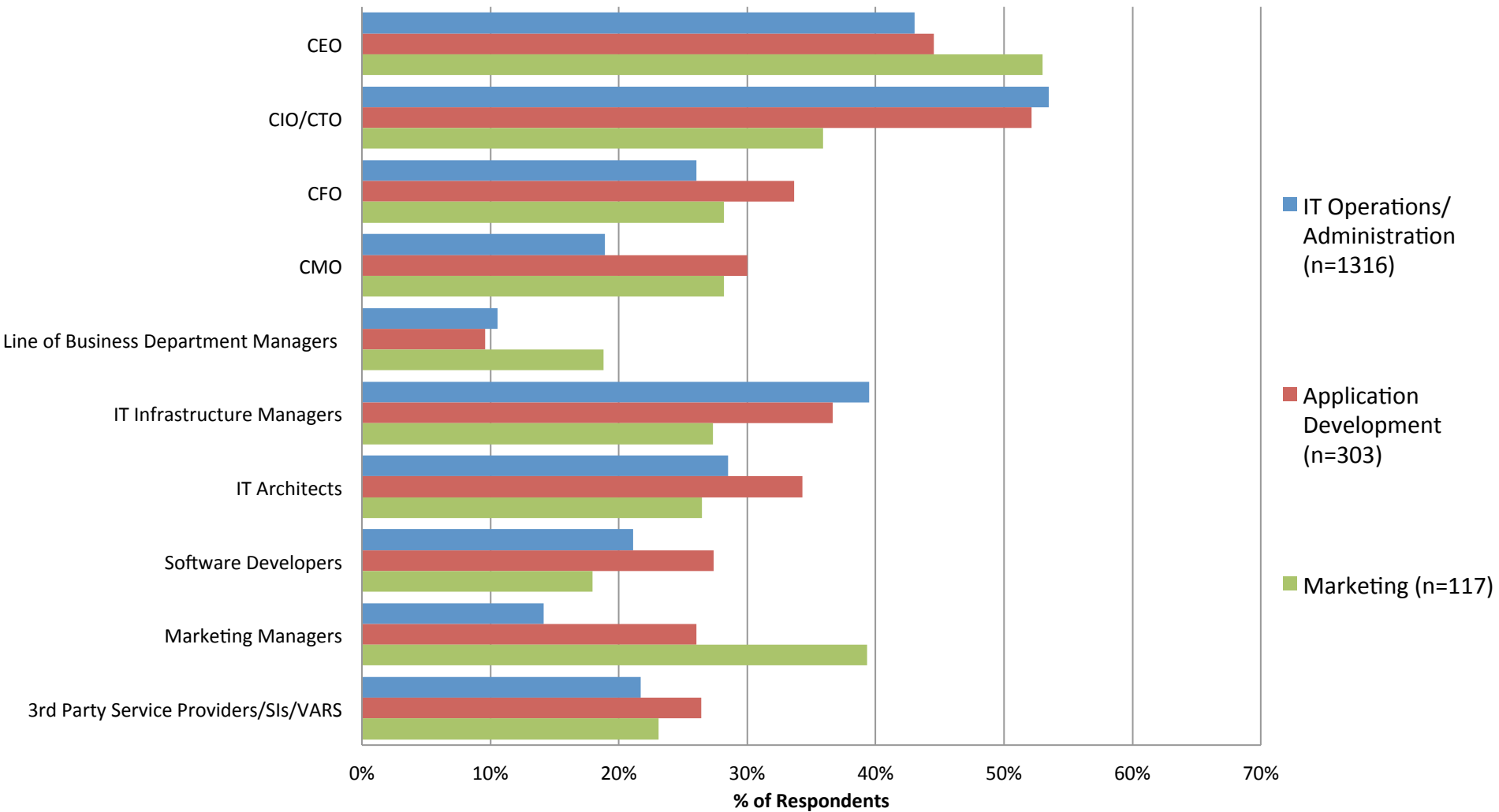
D9. When evaluating service providers for hosting and cloud services, describe the level of decision making authority each of the following stakeholders has at your organization. Think about the most significant projects or investments.

Stakeholder Decision Making Authority by Company Size



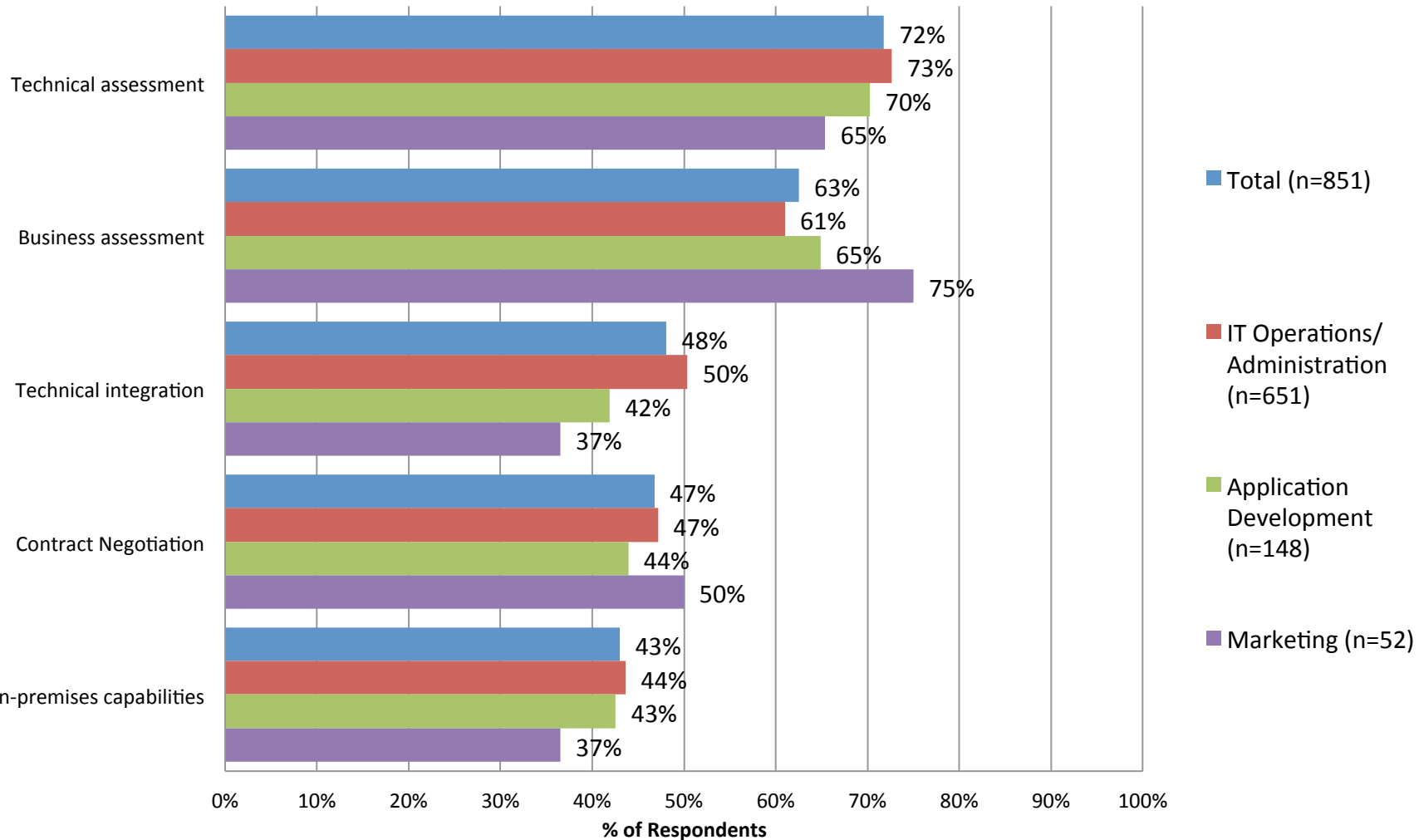
D9. When evaluating service providers for hosting and cloud services, describe the level of decision making authority each of the following stakeholders has at your organization. Think about the most significant projects or investments.

Stakeholder Decision Making Authority by Department



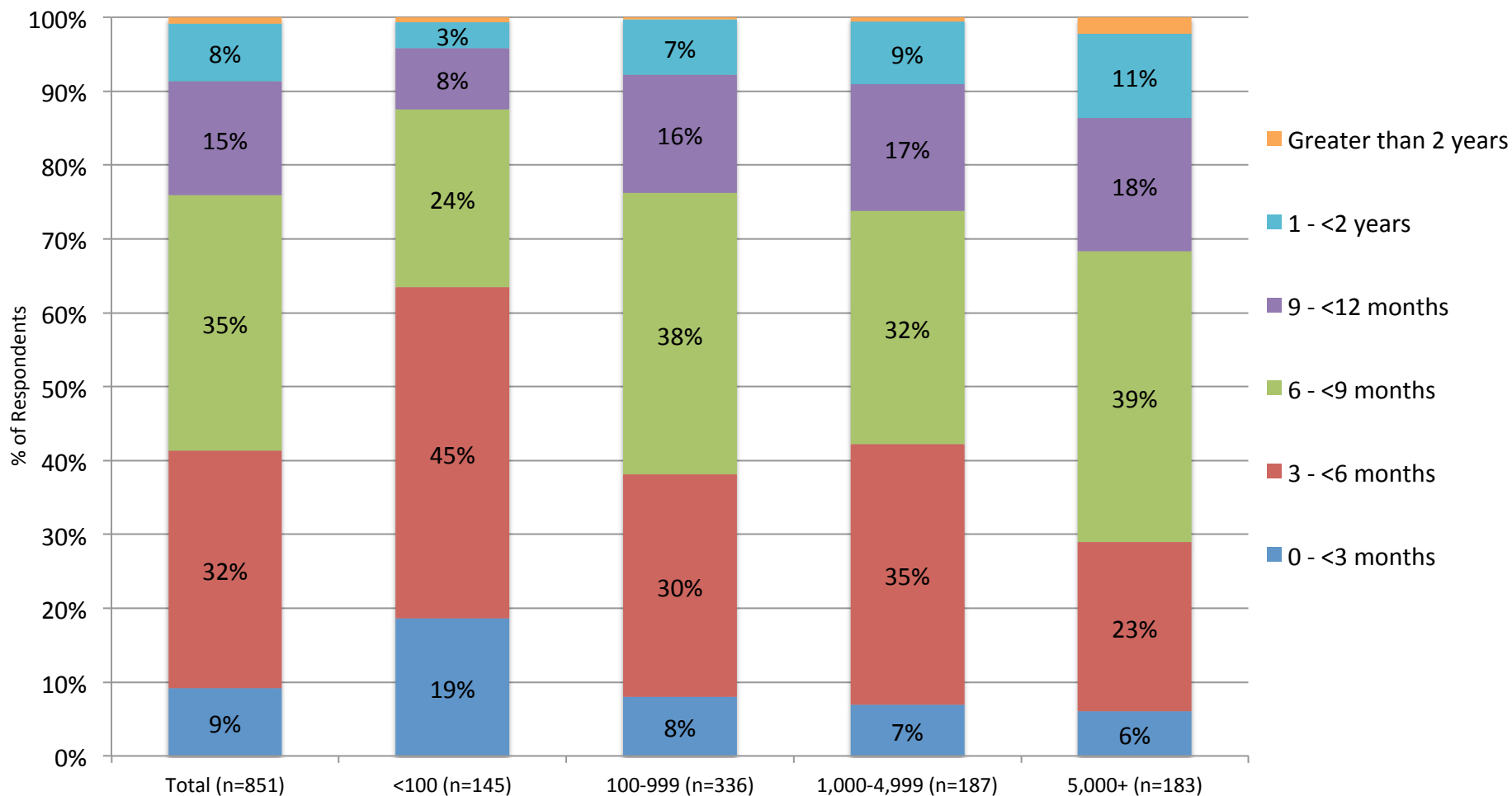
D9. When evaluating service providers for hosting and cloud services, describe the level of decision making authority each of the following stakeholders has at your organization. Think about the most significant projects or investments.

Buying Process by Department



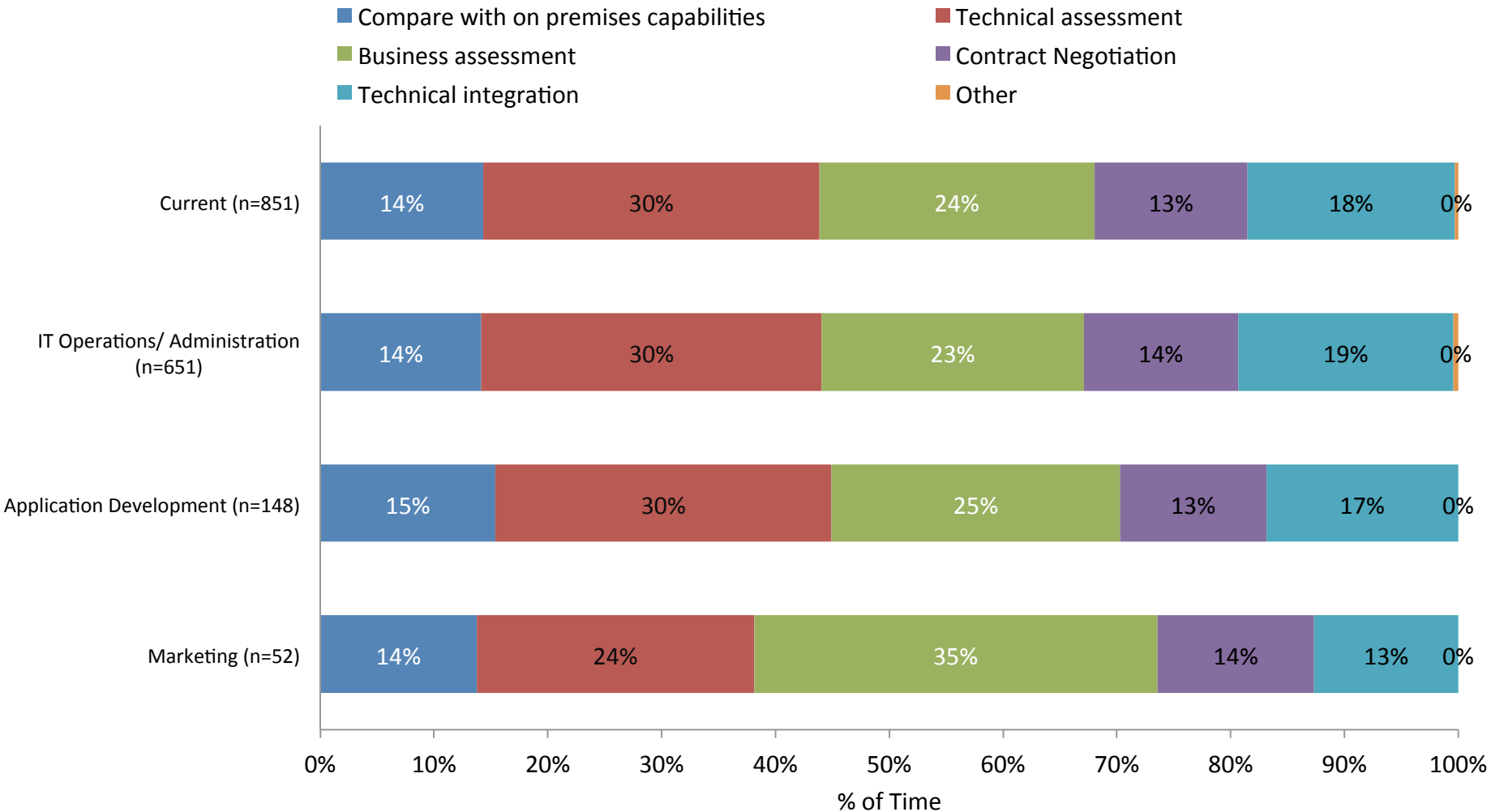
B1. Of the buying process stages outlined below, which [will/did] your company go through? (Pick multiple)

Buying Process Length by Company Size



B2. From initial assessment to technical integration, [how long do you expect the deployment of your most important hosting or cloud services project for next year to take/ how long did the deployment of your most recent important hosting or cloud services project take?"] (Pick one)

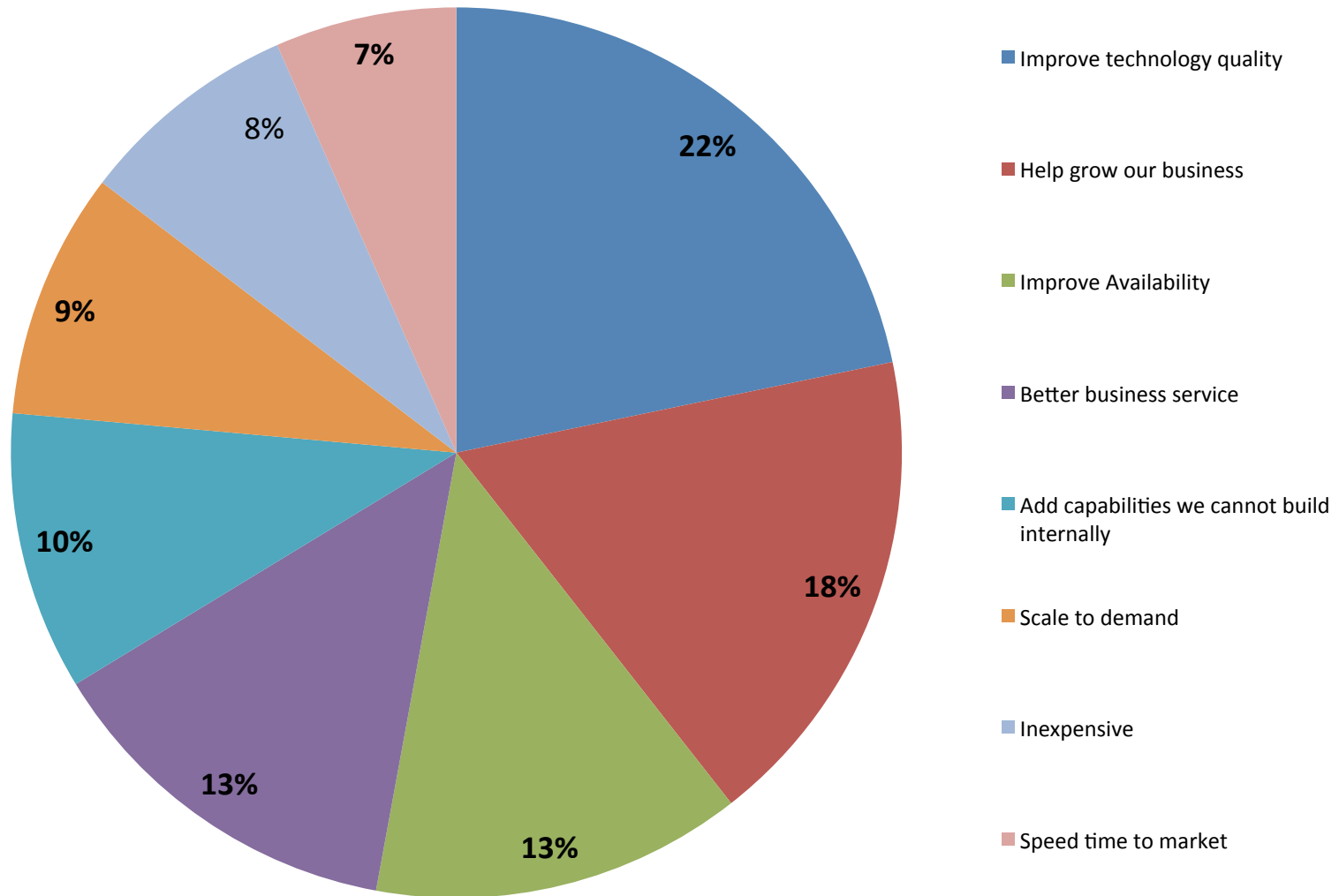
Buying Process Length by Department



B3. Please allocate your company's buying process time across the following stages: (Sum to 100)

CLOUD COMPUTING EXPECTATIONS

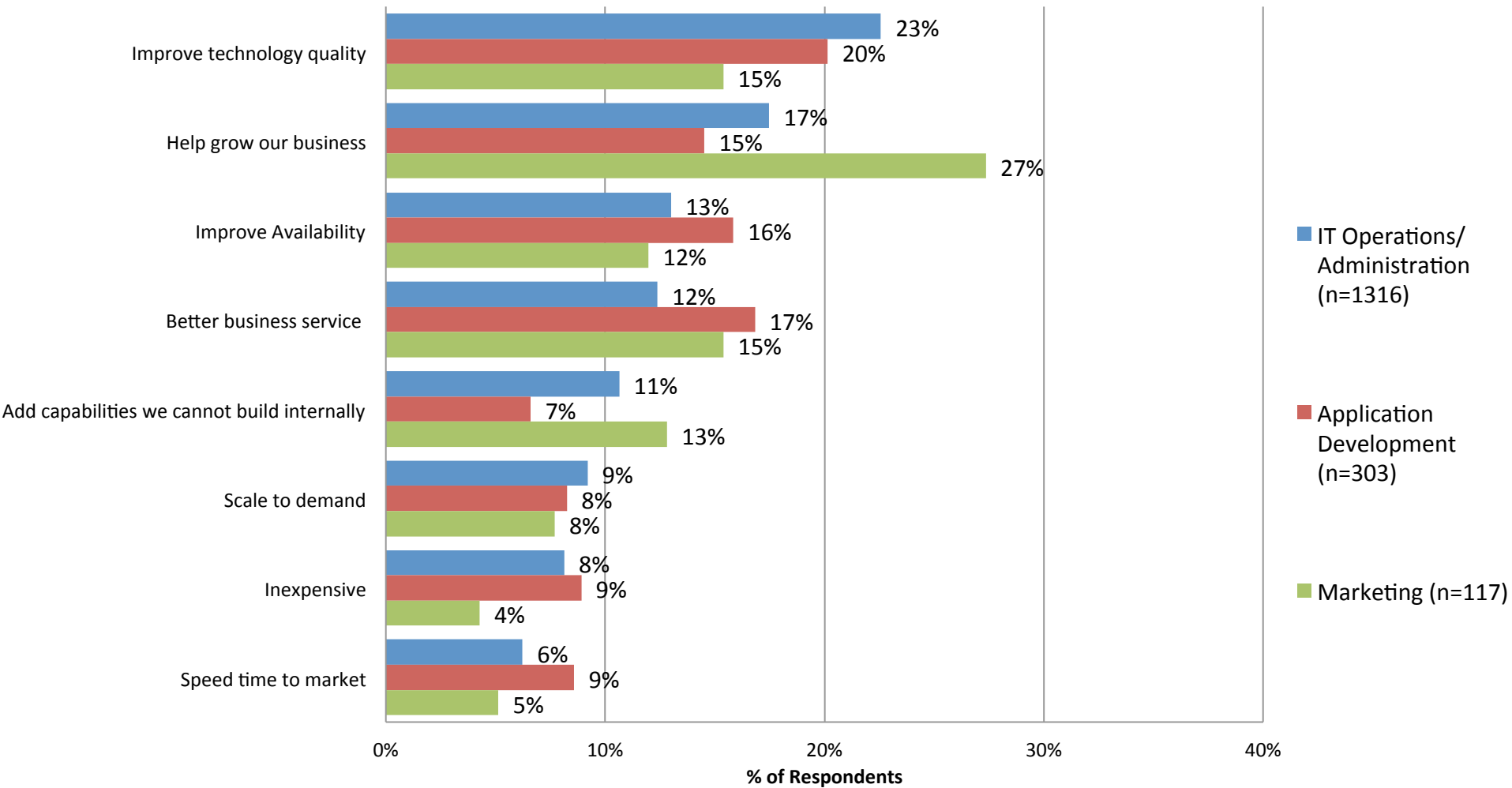
Highest Expectation Moving to Cloud



n=1089

A4a. What is your organization's highest expectation for moving to hosted services or cloud computing?

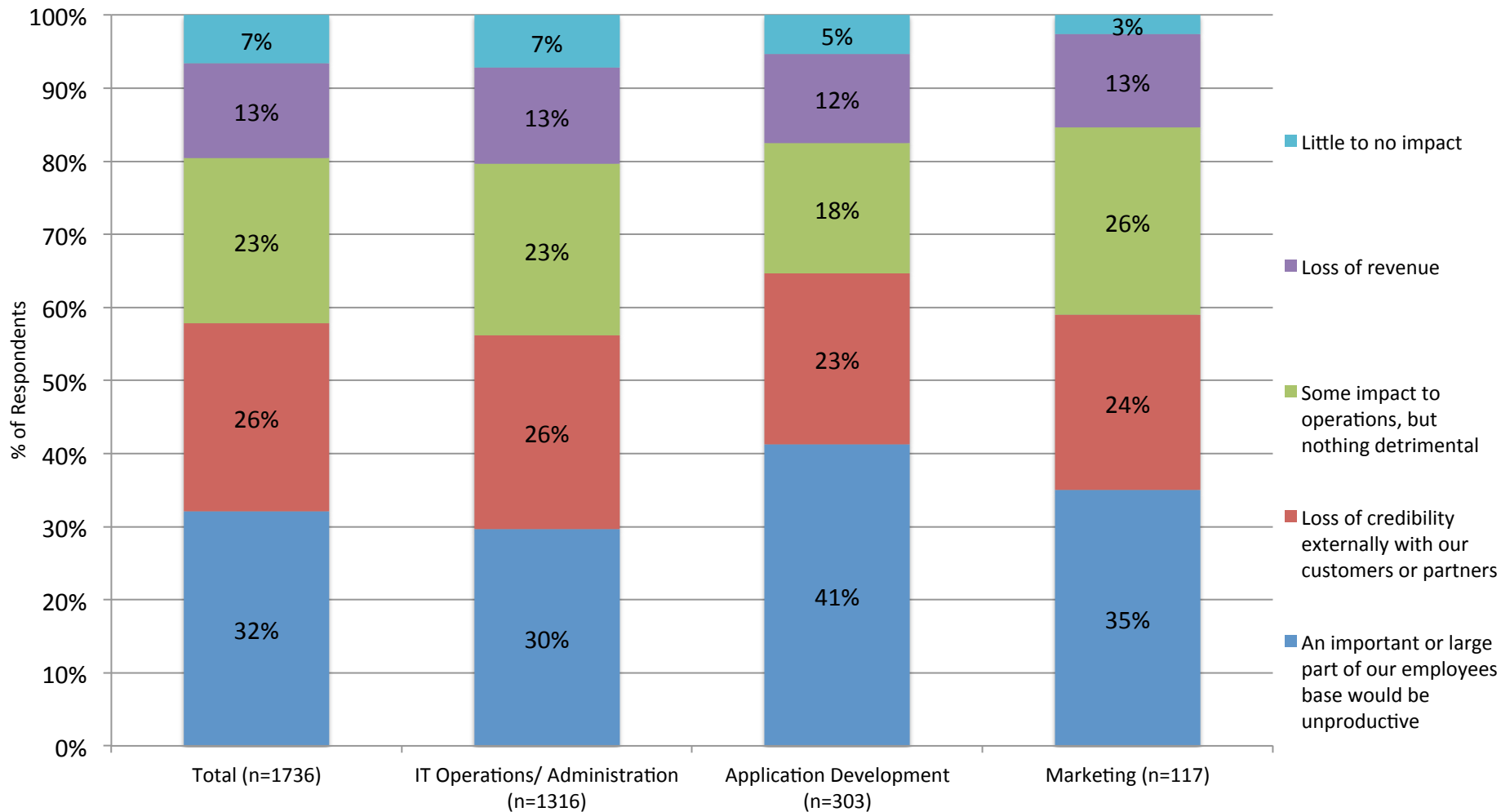
Highest Expectation Moving to Cloud by Department



A4a. What is your organization's highest expectation for moving to hosted services or cloud computing? (select one)

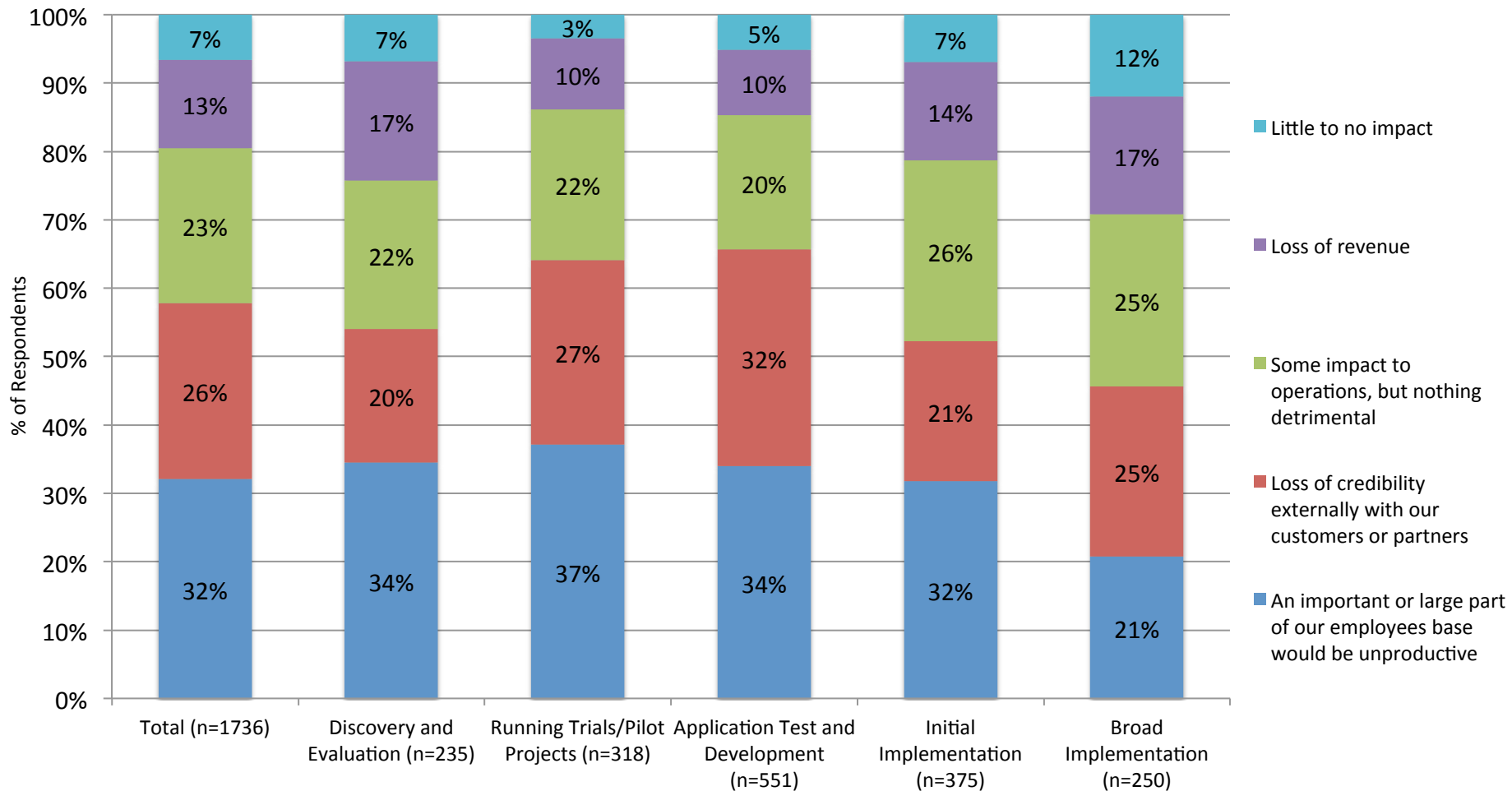
IMPACT OF CLOUD COMPUTING DOWNTIME

Impact of One Hour Downtime by Department



A5. Overall, thinking about the applications that are installed with your hosting and cloud SERVICE PROVIDERS, what would be the PRIMARY impact on your business if these applications were unavailable for 1-hour?

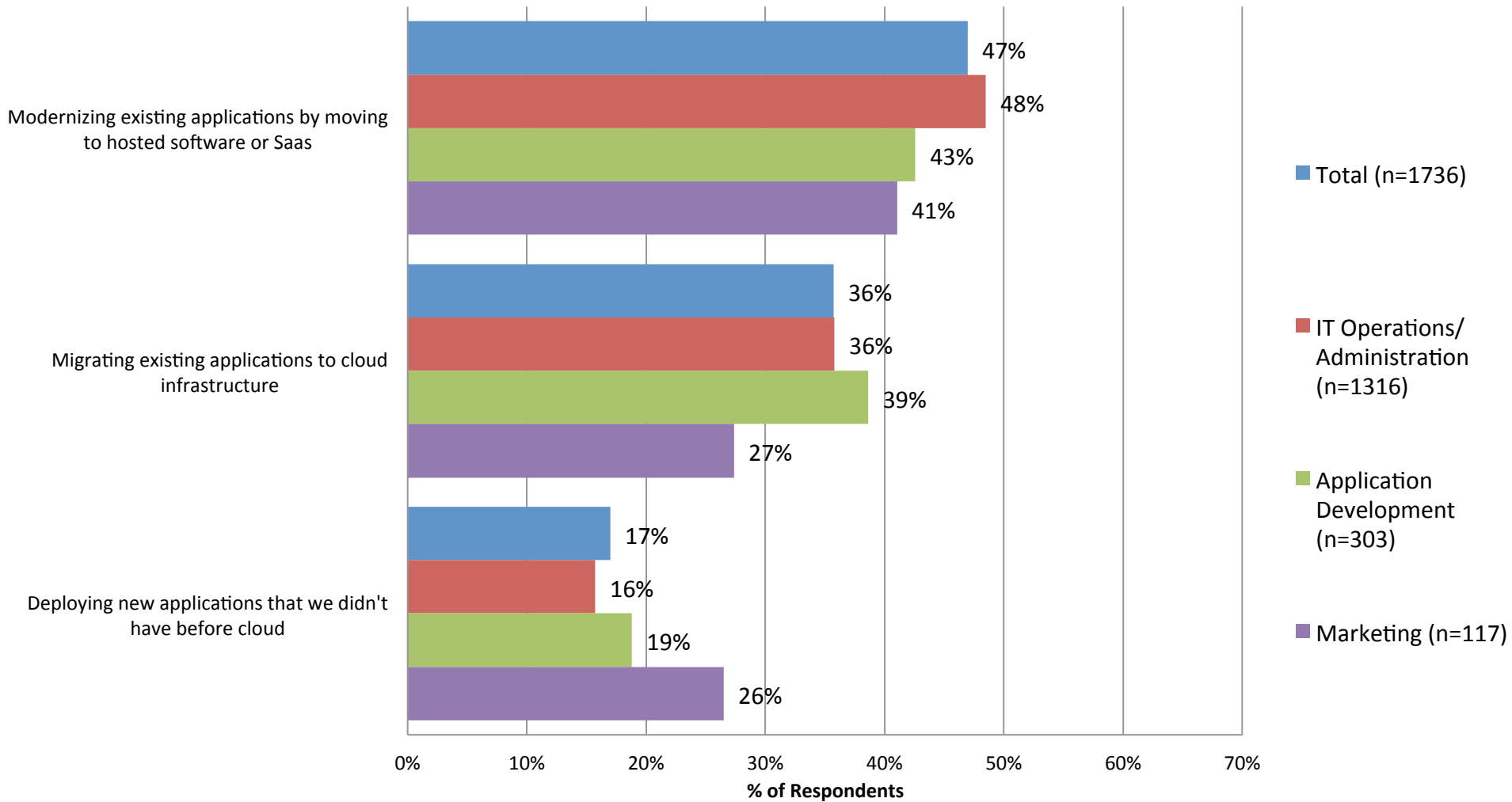
Impact of One Hour Downtime by Maturity



A5. Overall, thinking about the applications that are installed with your hosting and cloud SERVICE PROVIDERS, what would be the PRIMARY impact on your business if these applications were unavailable for 1-hour?

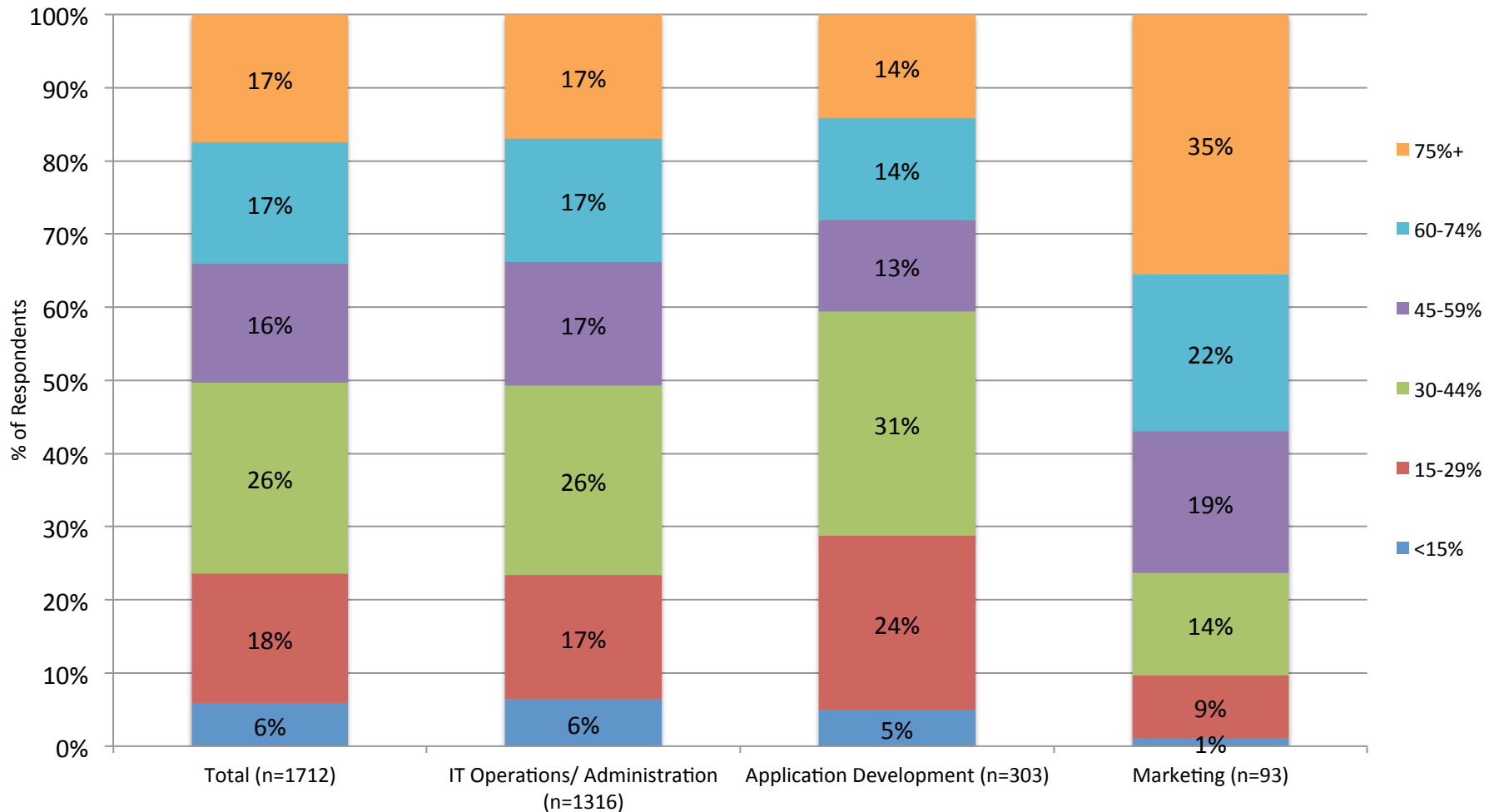
APPLICATIONS IN CLOUD COMPUTING ENVIRONMENT

Common Cloud Application Deployment by Department



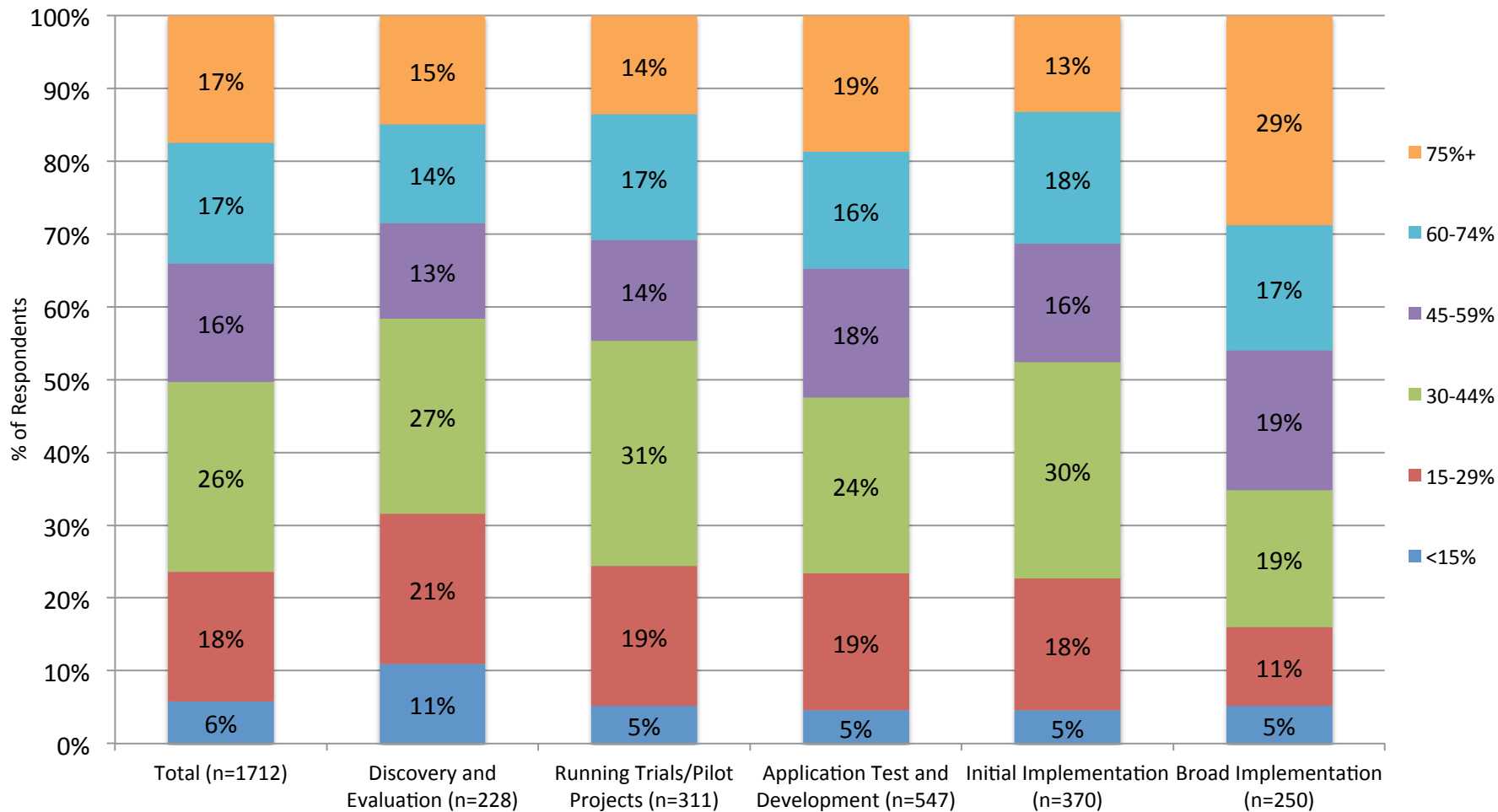
A2. What is your organization's most common type of application deployment for cloud computing?

Future Percent of Applications in Cloud by Department



A6. What is your organizations goal for the proportion of applications or resources that will be part of a cloud computing environment in two years? ____%

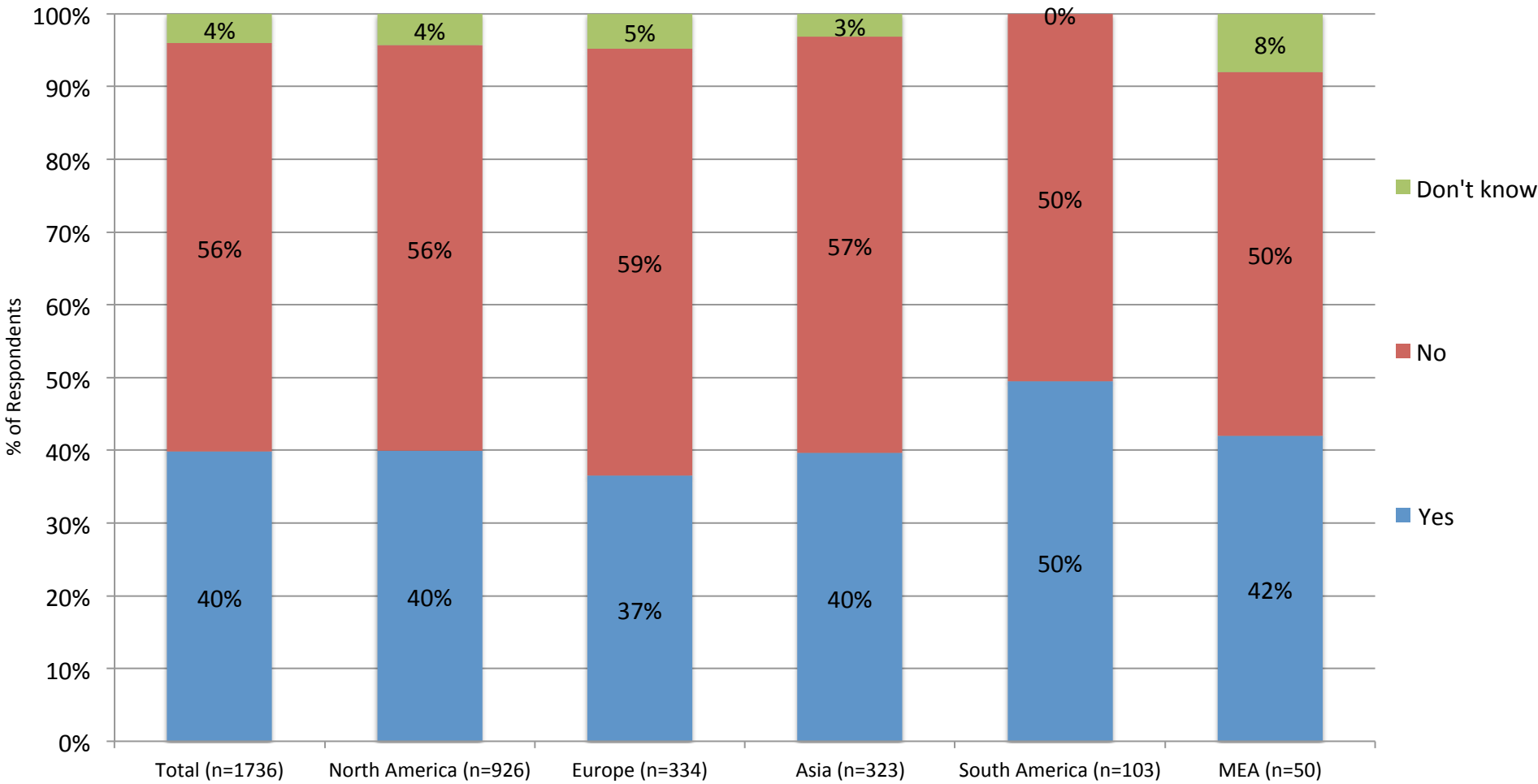
Future Percent of Applications in Cloud by Maturity



A6. What is your organizations goal for the proportion of applications or resources that will be part of a cloud computing environment in two years? ____%

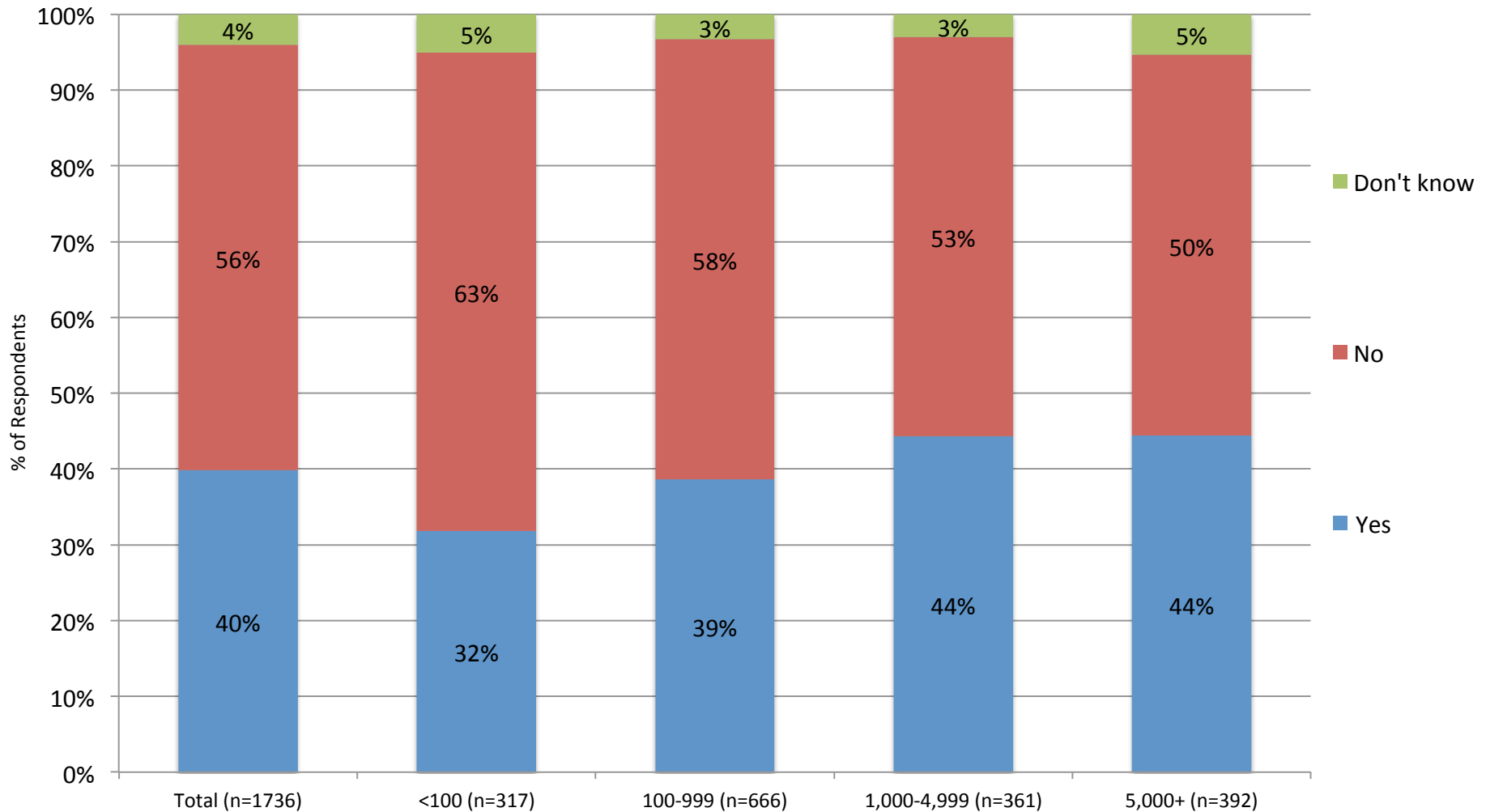
WINDOWS 2003 MIGRATION

Formal Migration Plans for Windows Server 2003 by Region



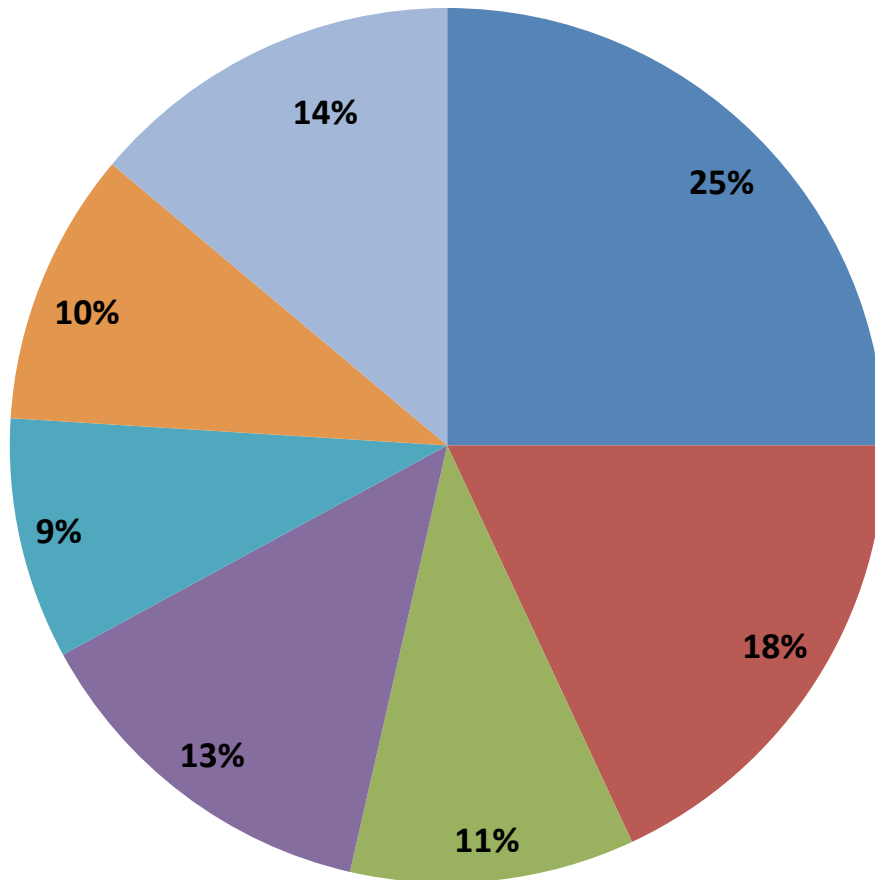
A9: Does your organization have a formal plan in place to migrate from Windows Server 2003?

Formal Migration Plans for Windows Server 2003 by Company Size



A9: Does your organization have a formal plan in place to migrate from Windows Server 2003?

Windows Server 2003 Migration Plan



Move to....

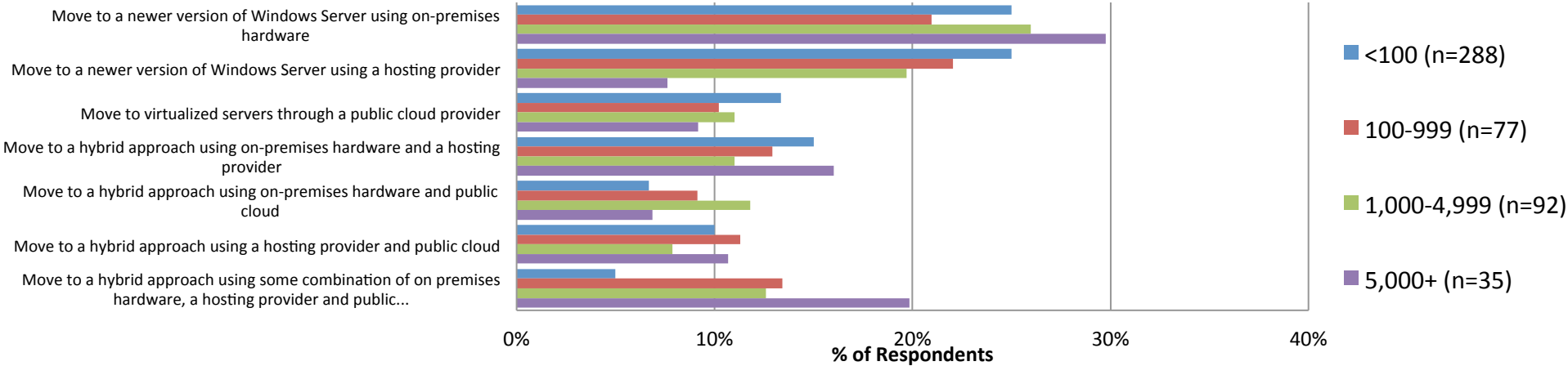
- ...a newer version of Windows Server using on-premises hardware
- ...a newer version of Windows Server using a hosting provider
- ...virtualized servers through a public cloud provider
- ...a hybrid approach using on-premises hardware and a hosting provider
- ...a hybrid approach using on-premises hardware and public cloud
- ...a hybrid approach using a hosting provider and public cloud
- ...a hybrid approach using some combination of on premises hardware, a hosting provider and public...

n=504

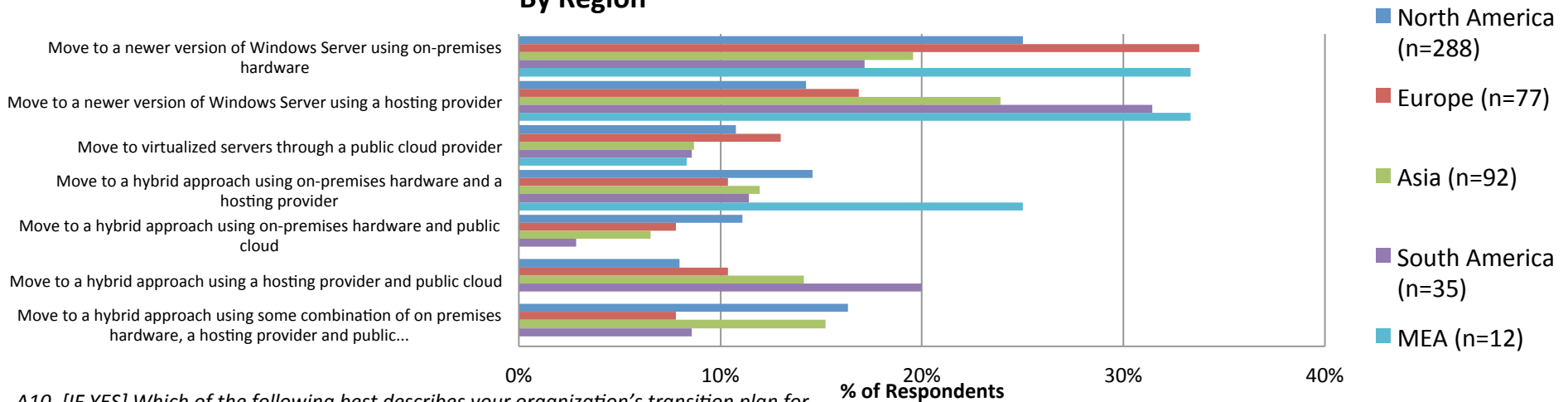
A10. [IF YES] Which of the following best describes your organization's transition plan for current Windows Server 2003 workloads?

Windows Server 2003 Migration Plan

By Company Size

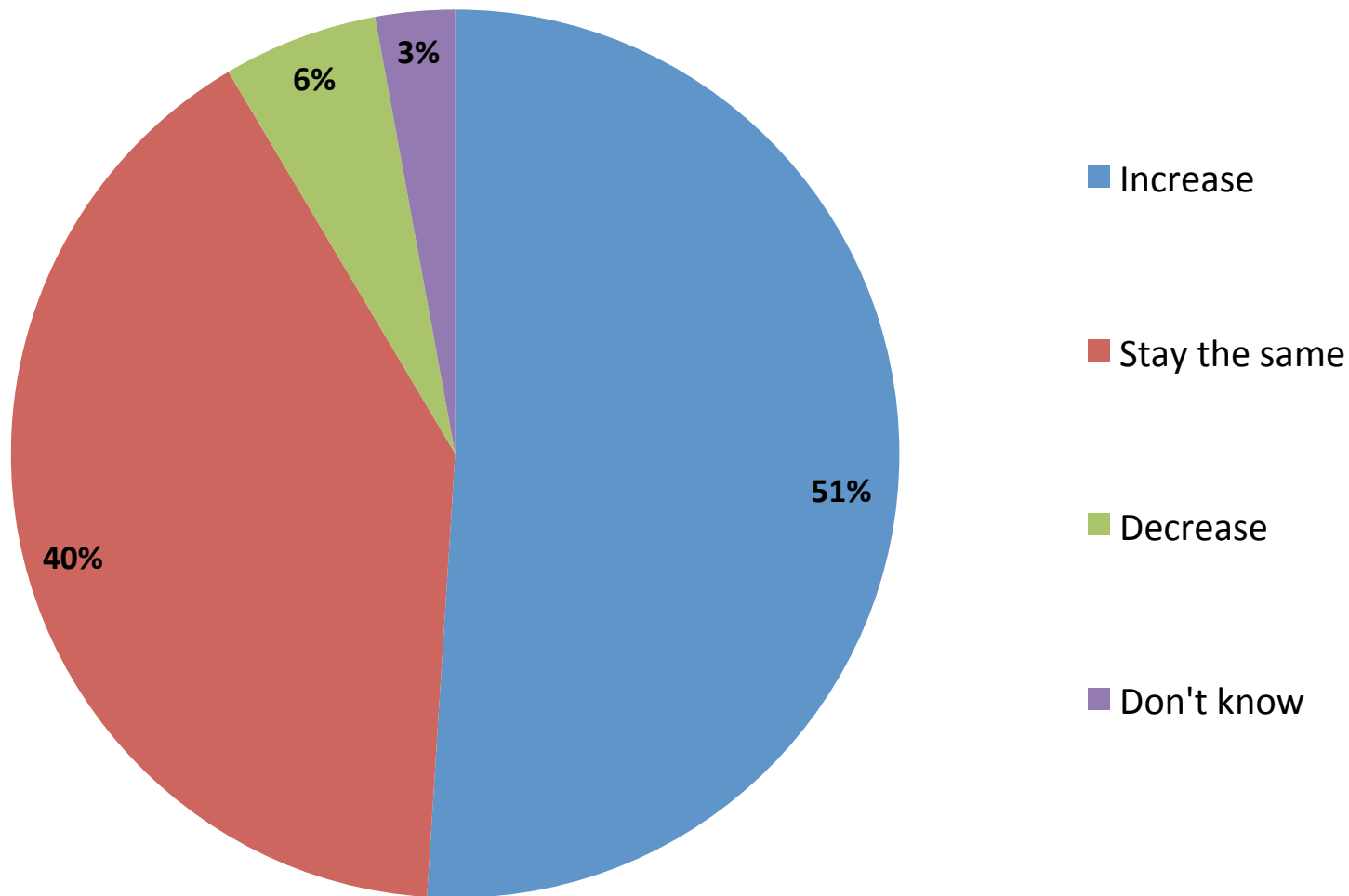


By Region



A10. [IF YES] Which of the following best describes your organization's transition plan for current Windows Server 2003 workloads?

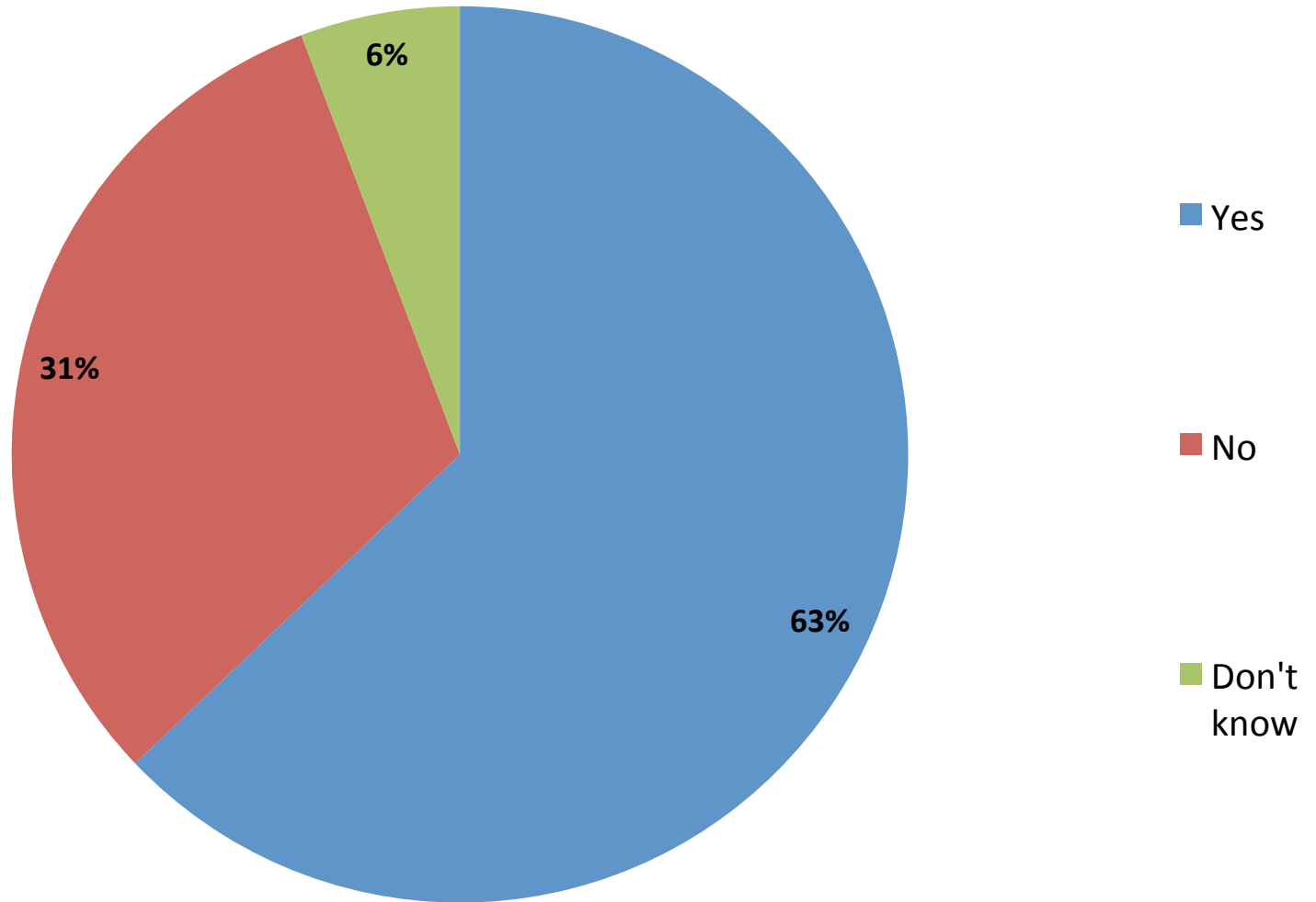
Windows Server 2003 Migration Impact on Hosted Services



n=692

A12. How will migrating Windows Server 2003 affect your use of hosted service providers?

Windows Server 2003 Migration Plan Enlist Service Provider



n=692

A15. Will your organization enlist a service provider in your transition from Windows Server 2003?



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