

# What datacentre managers really think about cloud

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## Quocirca Comment

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Quocirca recently completed a research project for Oracle covering 919 data centre managers' views on cloud computing.

Overall, the findings gave a positive view on cloud, with just under half stating that cloud would be either an important part of their future IT platform or a complete game changer for them. However, 16% stated that cloud would have no part in their organisation's future at all, or dismissed cloud as a passing fad. That many of these will already be using cloud services in such areas as receiving anti-virus and application updates, as well as their employees using such service as Google Maps seems to have passed them by.

40% of respondents stated that cloud security was either a complete show stopper for them or that it was the major issue that they felt had to be addressed to make cloud more appealing to them. At the other end of the scale, over 25% saw cloud security as being no more of an issue than any other issue they saw with cloud, nearly 25% felt that a different approach to cloud security was required, but that this was no big deal, and 5% felt that cloud security was no different to any other technical security they had to deal with.

When asked about existing cloud platforms, it was interesting that many respondents were still playing a wait-and-see game. 25% stated that they believed that an incumbent IT vendor (e.g. IBM, Oracle, HP, Dell) would come along and usurp the current cloud platform providers (e.g. Google, Amazon). A similar number felt that the number of available platforms provided plenty of choice for organisations to choose a cloud platform, with a similar number stating that they felt that it was too early to make a choice and that cloud had yet to mature sufficiently.

When looking at how respondents were viewing the building of private clouds, there was a marked match with where they were already. Those who already had a homogeneous environment were looking for a cloud platform that was homogeneous; those on a heterogeneous platform were looking for a cloud platform that could abstract from the hardware to provide a homogeneous cloud environment at the software level.

The research was carried out across 9 different geographies, and the cloud views were most positive in the USA, Germany/Switzerland and the Nordics. The Middle East, Italy and Iberia had the lowest expectations and perceptions of cloud. Quocirca believe that the USA has the highest expectations and perceptions based on the most cloud activity from vendors being within the USA itself. Germany and Switzerland take an architectural approach to computing, and for many, cloud computing provides a suitable architecture for flexibility, and the Nordics have good levels of IT/business alignment that makes cloud an attractive proposition for future growth. The Middle East, however, has little to drive it away from a one-application-per-physical-server model: it can afford the space, the hardware and, most importantly, the energy to maintain large data centres running at low levels of utilisation. For Italy and Iberia, however, the results are not promising. Should these regions wish to compete effectively against other regions, being dependent on under-utilised and inflexible IT platforms will not help them.

Analysis was also carried out at a vertical level, showing that telecommunications and media were most positive around cloud, with financial services and public sector being the least positive. Telecommunications companies tend to see IT as a core competency that is a central component to their business. The IT assets are massive energy drains, and anything that can be

done to provide a more effective and efficient platform will benefit the organisation's bottom line. Media is seeing massive changes in its market with the move to web-based systems and social media, and has had to accept that it needs far more flexible platforms in order to deal with such pressures. Financial services are inherently conservative, and security concerns and the masses of in-house coded applications make it hard for organisations in this vertical to be able to plan effectively for a concerted move to a cloud platform. Public sector has suffered from too many external influences in the past, and it is unlikely that post-recession spending plans from governments will make it possible for the public sector to be able to review this position and make a move to cloud in the near future.

Overall, the research shows that organisations are still confused by what they are hearing about cloud computing. Those at the sharp end of the business – the vendors, the media and the analysts – have a responsibility to ensure that information provided is clear and helps in educating those in most need of cloud – the end users – what such a platform brings to them. Arguments over whether the future is private or public cloud are self-serving and do not help

create the market – the general outcome for most will be a hybrid model anyway. Throwing fear, uncertainty and doubt (FUD) at cloud in such areas as security are also self-serving: if a view is taken that it is all about information security – not hardware or software security – then the cloud just becomes a part of an overall architecture and the means that an organisation deals with security becomes all-encompassing.

Cloud can be a major game changer for an organisation, but the business and IT groups need help in understanding how cloud can help them – and then in how to move from where they are currently to a hybrid cloud model. Forklift moves, where a vendor promises the earth based on a complete swap out of equipment, are not the answer. Providing a platform where organisations can choose what moves into the cloud at what time to suit them will create a positive market for cloud – arguing over the detail could kill the market before it has really taken off.

Quocirca's report on the research can be downloaded free here: <http://www.quocirca.com/reports/597/next-generation-datacentres-index-cycle-i-cloud-findings>

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## About Quocirca

Quocirca is a primary research and analysis company specialising in the business impact of information technology and communications (ITC). With world-wide, native language reach, Quocirca provides in-depth insights into the views of buyers and influencers in large, mid-sized and small organisations. Its analyst team is made up of real-world practitioners with first-hand experience of ITC delivery who continuously research and track the industry and its real usage in the markets.

Through researching perceptions, Quocirca uncovers the real hurdles to technology adoption – the personal and political aspects of an organisation's environment and the pressures of the need for demonstrable business value in any implementation. This capability to uncover and report back on the end-user perceptions in the market enables Quocirca to advise on the realities of technology adoption, not the promises.

Quocirca research is always pragmatic, business orientated and conducted in the context of the bigger picture. ITC has the ability to transform businesses and the processes that drive them, but often fails to do so. Quocirca's mission is to help organisations improve their success rate in process enablement through better levels of understanding and the adoption of the correct technologies at the correct time.

Quocirca has a pro-active primary research programme, regularly surveying users, purchasers and resellers of ITC products and services on emerging, evolving and maturing technologies. Over time, Quocirca has built a picture of long term investment trends, providing invaluable information for the whole of the ITC community.

Quocirca works with global and local providers of ITC products and services to help them deliver on the promise that ITC holds for business. Quocirca's clients include Oracle, Microsoft, IBM, O2, T-Mobile, HP, Xerox, EMC, Symantec and Cisco, along with other large and medium sized vendors, service providers and more specialist firms.

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