Private Cloud Deployment

ADOPTION BARRIERS, DEPLOYMENT LEVELS, CUSTOMER EXPERIENCES AND FUTURE PLANS FOR PRIVATE CLOUD

Research findings for France

IDG CONNECT

Survey conducted by IDG Connect
on behalf of Oracle

IDG Connect is the demand generation division of International Data Group (IDG), the world's largest technology media company. Established in 2006, it utilises access to 44 million business decision makers' details to unite technology marketers with relevant targets from 137 countries around the world. Committed to engaging a disparate global IT audience with truly localised messaging, IDG Connect also publishes market specific thought leadership papers on behalf of its clients, and produces research for B2B marketers worldwide.

ORACLE

Question 1. Which country do you currently reside in?

Country	Aggregate	France (52)
France	11%	100%
Russia	11%	
United Kingdom	11%	
Germany	11%	
South Africa	11%	
Netherlands	6%	
Sweden	6%	
Finland	6%	
Switzerland	5%	
Norway	5%	
Denmark	5%	
United Arab Emirates	5%	
Saudi Arabia	5%	
Bahrain	1%	
Kuwait	0.4%	
Qatar	0.4%	
Lebanon	0.4%	

Country Summary	
Middle East	10%
France	10%
Russia	10%
United Kingdom	10%
Germany	10%
South Africa	9%
NORDIC (102)	5%
Germany, Netherlands, Switzerland (101)	7%
Netherlands	5%
Finland	5%
Sweden	5%
Norway	5%
Switzerland	5%
Denmark	5%

Question 2. How many employees do you have working in your organization? (Select one)

Organization Size	Aggregate	France (52)
100-249 Employees	1%	2%
250-499 Employees	22%	8%
500-999 Employees	31%	21%
1000-2499 Employees	22%	31%
2500-9999 Employees	12%	23%
10,000 or More Employees	12%	15%

Question 3. Which of the below best describes your primary job title?

Primary Job Title - IT Management	Aggregate	France (52)
Manager	31%	15%
Director	25%	37%
CIO, CTO, CDO	22%	23%
VP	12%	12%
Executive VP, Senior VP	10%	13%

Question 4. Which of the following best describes your industry? (Select one)

Industry	Aggregate	France (52)
Software/ Computer Services	16%	23%
Finance/ Banking/ Accounting/ Investment	11%	10%
Manufacturing (Non Computer Related)	9%	2%
Engineering	8%	10%
Electronics	7%	4%
Education	5%	6%
Retail Trade/ E-Tailing	4%	2%
Communications/ Entertainment/ Media	4%	8%
Construction/ Architecture	4%	6%
Manufacturing (Computer Related)	4%	8%
Health/ Medical/ Pharmaceutical	4%	
Insurance	3%	
Oil/ Gas/ Utility	3%	
Government/ Public Administration/ Military	2%	2%
Real Estate	2%	2%
Hospitality	2%	4%
Legal	2%	2%
Distribution/ Wholesale	2%	
Transportation (Commercial)	2%	8%
Internet Service Provider	2%	2%
Mining/ Construction/ Petroleum/ Refining	1%	
Agriculture/ Forestry	1%	2%
Non-Profit	1%	2%
Publishing/ Advertising/ Broadcasting/ Public Relations	1%	
Aerospace/ Defence Contractor	0%	
Transportation (Public)	0%	

Question 5. Does the private cloud allow you to innovate faster to win or retain customers? (Select one in each column)

Aggregate	Innovate Faster	Win Customers	Retain Customers
Yes	92%	76%	73%
No	8%	24%	27%

France	Innovate Faster	Win Customers	Retain Customers
Yes	98%	88%	73%
No	2%	12%	27%

Private Cloud as Enabler	Aggregate	France (52)
Innovate Faster	92%	98%
Win Customers	76%	88%
Retain Customers	73%	73%

Question 6. Does the private cloud allow you to have IT focus on areas that will deliver more business value? (Select one only)

Private Cloud and Business Value	Aggregate	France (52)
Yes	94%	98%
No	6%	2%

Question 7. What areas of business value see the greatest benefit? (Select one or more) Which is most important? (Select one only)

Value Areas and Benefits	Aggregate	France (52)
Ability to Scale	68%	71%
Integration with Partners and Suppliers	64%	67%
Maintaining Required Performance/ Availability Service Levels	63%	67%
Security of Customer Information	62%	67%
Communication with Prospects and Customers	62%	73%
Entry into New Markets or Customer Segments	59%	62%
Adaptation to New Customer Requirements	58%	56%
Enhanced Customer Experience	44%	48%

Most Important	Aggregate	France (52)
Security of Customer Information	19%	12%
Maintaining Required Performance/ Availability Service Levels	17%	19%
Integration with Partners and Suppliers	15%	21%
Communication with Prospects and Customers	14%	25%
Adaptation to New Customer Requirements	14%	10%
Entry into New Markets or Customer Segments	10%	8%
Ability to Scale	9%	6%
Enhanced Customer Experience	3%	

Question 8. How mature is your organization in its adoption of Private Cloud (Select one) Where do feel you will be in two years? (Select one)

Aggregate	Current	Two Years
Have Taken First Steps e.g. virtualization	33%	19%
At an Intermediate stage	44%	30%
Mature and Sophisticated	19%	51%
No Plans	4%	
Other (please state)	0%	0%

France	Current	Two Years
Have Taken First Steps e.g. virtualization	31%	12%
At an Intermediate stage	48%	23%
Mature and Sophisticated	17%	65%
No Plans	6%	
Other (please state)		

Question 9. What are the building blocks of a successful Private Cloud infrastructure? (Select all that apply) Which is most important? (Select one)

Successful Private Cloud Drivers	Aggregate	France (52)
Standardization of IT	82%	87%
Having Governance Controls in Place	70%	62%
Winning the Support of Key Business Decision Makers	70%	60%
Strong Relationship with Supplier	46%	48%

Most Important	Aggregate	France (52)
Standardization of IT	33%	46%
Having Governance Controls in Place	33%	19%
Winning the Support of Key Business Decision Makers	23%	23%
Strong Relationship with Supplier	10%	12%

Question 10. If using Hybrid Cloud infrastructure, what is most important (Select one only)

Key Hybrid Cloud Drivers	Aggregate	France (52)
Winning the Support of Key Business Decision Makers	29%	25%
Cost Efficiency	25%	31%
Strong Relationship with Supplier	22%	21%
Having Governance Controls in Place	13%	15%
Scalability	8%	4%
Low Barrier to Entry	3%	4%

Question 11. How much influence does each functional area have to move from existing systems and platforms to Private Cloud? (Sum to 100) To Hybrid Cloud? (Sum to 100)

Aggregate	Private Cloud Influence	Hybrid Cloud Influence
Centralized IT	56%	55%
Other Business Functions	44%	45%

France	Private Cloud Influence	Hybrid Cloud Influence
Centralized IT	60%	57%
Other Business Functions	40%	43%

Question 12. What weight do you give to each of the following as motivation to move toward Private Cloud? (Sum to 100) To Hybrid Cloud?

Aggregate	Private Cloud	Hybrid Cloud
We had an Aging Datacenter that Needed Modernizing	9	8
We Wanted to Provide Faster Business Value	10	9
We Deploy Primarily For Test/ Development	8	9
We had a Clear Strategy to Move Applications to the Cloud Wherever Possible	9	9
We Preferred Private or Hybrid Cloud to Public Cloud	9	9
We Wanted to Experiment and Compare Different Cloud Models	8	9
We Want to Reduce Costs	11	11
We Want to Enable Staff to Pursue New Areas of Innovation	9	9
A Practical Approach that Let Us Deploy and Get the Benefits of Cloud with Little Risk and Lots of Flexibility	9	10
A Way to Put Individual Workloads in Optimally Effective Environments	8	8
A Way to Navigate Governance and Security Requirements	9	9

France	Private Cloud	Hybrid Cloud
We had an Aging Datacenter that Needed Modernizing	9	9
We Wanted to Provide Faster Business Value	9	10
We Deploy Primarily For Test/ Development	9	8
We had a Clear Strategy to Move Applications to the Cloud Wherever Possible	9	7
We Preferred Private or Hybrid Cloud to Public Cloud	8	12
We Wanted to Experiment and Compare Different Cloud Models	8	9
We Want to Reduce Costs	13	9
We Want to Enable Staff to Pursue New Areas of Innovation	9	9
A Practical Approach that Let Us Deploy and Get the Benefits of Cloud with Little Risk and Lots of Flexibility	9	9
A Way to Put Individual Workloads in Optimally Effective Environments	8	8
A Way to Navigate Governance and Security Requirements	9	11

Question 13. What are/were the major barriers you see for your organization as it adopts or expands the use of Private Cloud? (Select all that apply). Which one is the most critical? (Select one only)

Barriers to Adopt/Expand Private Cloud Use	Aggregate	France (52)
Data Security	54%	50%
Hardware Costs	45%	46%
Software License Costs	45%	44%
Virtualization and Automation Challenges	43%	31%
Integration with Existing Applications	42%	38%
Network Design	40%	31%
Available Skills	38%	27%
Competing Budget Priorities	38%	31%
Application Performance	37%	29%
Identity Management	34%	33%
Executive Management Support	33%	31%
Vendor Selection	32%	23%

Most Critical	Aggregate	France (52)
Data Security	24%	38%
Integration with Existing Applications	10%	4%
Hardware Costs	9%	12%
Software License Costs	8%	6%
Application Performance	7%	10%
Available Skills	7%	6%
Virtualization and Automation Challenges	7%	6%
Competing Budget Priorities	6%	8%
Vendor Selection	6%	
Network Design	6%	2%
Executive Management Support	5%	6%
Identity Management	5%	4%

Question 14. What are the major barriers you see for your organization as it adopts or expands the use of Hybrid Cloud? (Select one or more) Which is most significant? (Select one only)

Barriers to Adopt/Expand Hybrid Cloud Use	Aggregate	France (52)
Need to Manage Multiple IT Architectures	60%	60%
Network Bandwidth and Management	57%	42%
Strong Relationship with IT Supplier	52%	40%
Scalability	51%	44%
Decide which Workloads Sit where	47%	48%
Understand Data Governance Challenges	28%	27%

49% 47%

Most Significant	Aggregate	France (52)
Network Bandwidth and Management	26%	19%
Strong Relationship with IT Supplier	24%	21%
Need to Manage Multiple IT Architectures	22%	23%
Scalability	11%	17%
Decide which Workloads Sit where	9%	8%
Understand Data Governance Challenges	9%	12%

Question 15. What were the biggest learnings or "ah ha" moments from your Private Cloud deployment? (Select one or more) What was the most valuable? (Select one only)

Private Cloud Deployment Learnings	Aggregate	France (52)
Standardization of IT Must be in Place First	53%	50%
IT Change Management Must be Strong	51%	50%
Communication of Strategy to IT Staff is Critical	51%	31%
Adequate Staff Skills Must be Added/ Retained	49%	54%
Showing Value to the Business is Critical	47%	35%
Communication Lines with Executive Stakeholders Must be Good	43%	29%
A Phased Approach to Develop Best Practices is Key	42%	35%
Defining what is a Private Cloud is a Big Part of the Challenge	38%	35%

47% 52%

Most Valuable	Aggregate	France (52)
Standardization of IT Must be in Place First	17%	15%
IT Change Management Must be Strong	15%	17%
Showing Value to the Business is Critical	14%	12%
Adequate Staff Skills Must be Added/ Retained	13%	17%
Communication of Strategy to IT Staff is Critical	13%	17%
Communication Lines with Executive Stakeholders Must be Good	12%	4%
A Phased Approach to Develop Best Practices is Key	9%	4%
Defining what is a Private Cloud is a Big Part of the Challenge	7%	13%

Question 16. Which form of Private Cloud do you view as important to your organization? (Select one or more) What will be most important in two years? (Select one only)

Private Cloud Format	Aggregate	France (52)
Software as a Service	71%	71%
Database as a Service	70%	75%
Platform as a Service	62%	54%
Middleware as a Service	53%	54%
Infrastructure as a Service	41%	44%

Private Cloud Format in Two Years	Aggregate	France (52)
Database as a Service	27%	27%
Software as a Service	25%	23%
Platform as a Service	23%	21%
Infrastructure as a Service	16%	21%
Middleware as a Service	9%	8%

Question 17. Which of these technical areas were important when you scoped your Private Cloud deployment? (Select one or more)

Important Technical Areas	Aggregate	France (52)
Application Integration	62%	44%
Systems Management	60%	48%
Deployment Architecture	57%	58%
Availability Architecture	55%	60%
Compelling Business Case	28%	21%

Question 18. And after deployments, which do you feel you required more consideration? (Select one or more)

Relative Importance of Technical Areas	Aggregate	France (52)
Systems Management	57%	50%
Application Integration	56%	46%
Deployment Architecture	51%	44%
Availability Architecture	49%	56%
Compelling Business Case	23%	13%

Question 19. Which private cloud vendors were considered during your most recent private cloud deployment? (Select one or more) Which vendor was your primary partner? (Select one only)

Private Cloud Vendors Considered	Aggregate	France (52)
Microsoft	67%	69%
IBM	53%	62%
Cisco	51%	62%
Oracle	49%	54%
HP	40%	37%
VMWare	38%	27%
Citrix	33%	25%
Red Hat	26%	27%
NetApp	23%	21%
Engineered Systems/ Integrated Infrastructure Specialist e.g. Nutanix	18%	17%
EMC	0.4%	
CSC	0.2%	
CapGemini	0.2%	
Tieto	0.2%	
First Technology	0.2%	

Primary Consideration	Aggregate	France (52)
Microsoft	29%	13%
IBM	16%	29%
Oracle	12%	19%
Cisco	11%	6%
VMWare	8%	6%
HP	7%	10%
Red Hat	4%	4%
Citrix	4%	4%
NetApp	3%	4%
Engineered Systems/ Integrated Infrastructure Specialist e.g. Nutanix	3%	6%
Tieto	0.2%	
CSC	0.2%	
CapGemini	0.2%	
First Technology	0.2%	

Question 20. Which of these are among your plans for next steps toward a cloud-based infrastructure? (Select one or more) What is the highest priority? (Select one)

Future Plan	Aggregate	France (52)
Deploy More Private Cloud Services	71%	71%
Deploy More Hybrid Cloud Services	68%	67%
Deploy More Public Cloud Services	63%	63%
Commercialize Projects and Sell Our Cloud Services to Third-Party Customers	47%	40%
Unsure/ Don’t Know	10%	2%

52% 47%

Highest Priority	Aggregate	France (52)
Deploy More Private Cloud Services	36%	38%
Deploy More Hybrid Cloud Services	32%	29%
Deploy More Public Cloud Services	16%	19%
Commercialize Projects and Sell Our Cloud Services to Third-Party Customers	13%	12%
Unsure/ Don’t Know	2%	2%