



Think Cloud Services for Government,
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Roadmap towards a Resilient and Trusted European Cloud Market

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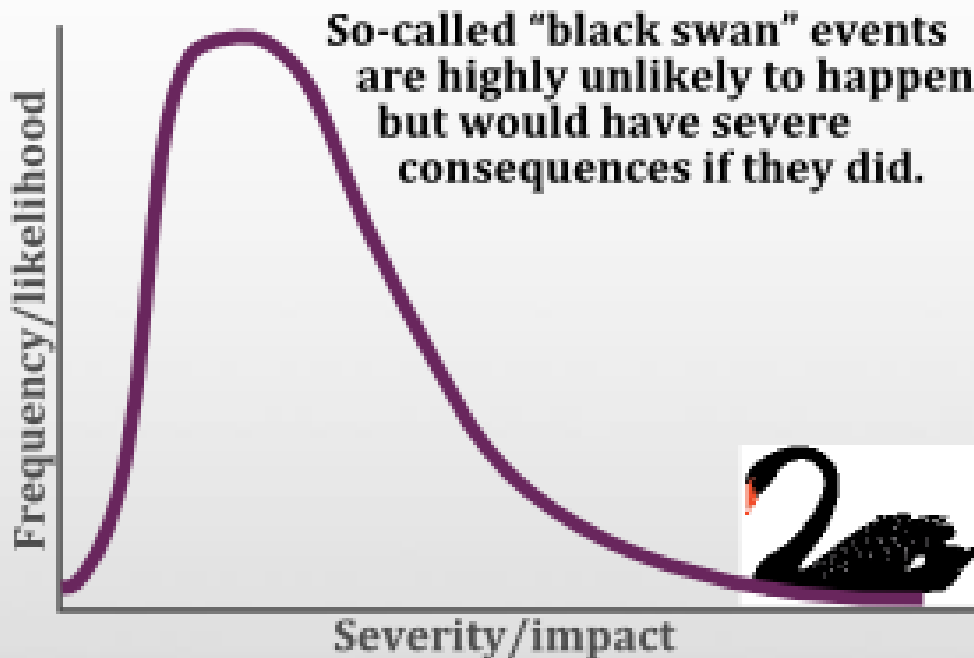
Why care about cloud market structure?

- ◆ Innovation for the sake of innovation is interesting...but pointless
- ◆ Innovation needs to get to market
- ◆ The best technology does not always win the most market share
- ◆ The technology that is most ready for market normally wins
- ◆ Innovative Projects need to demonstrate not only Technology Readiness, but also Market Readiness.
- ◆ How does a project fit into the market?
- ◆ How can a specialist digital technology project outsource all its non-core requirements and risks, in order to be market-ready?



Black Swan Risks are Receding

The Black Swan



*Source: Chris Mandel,
Sedgwick Inc.*

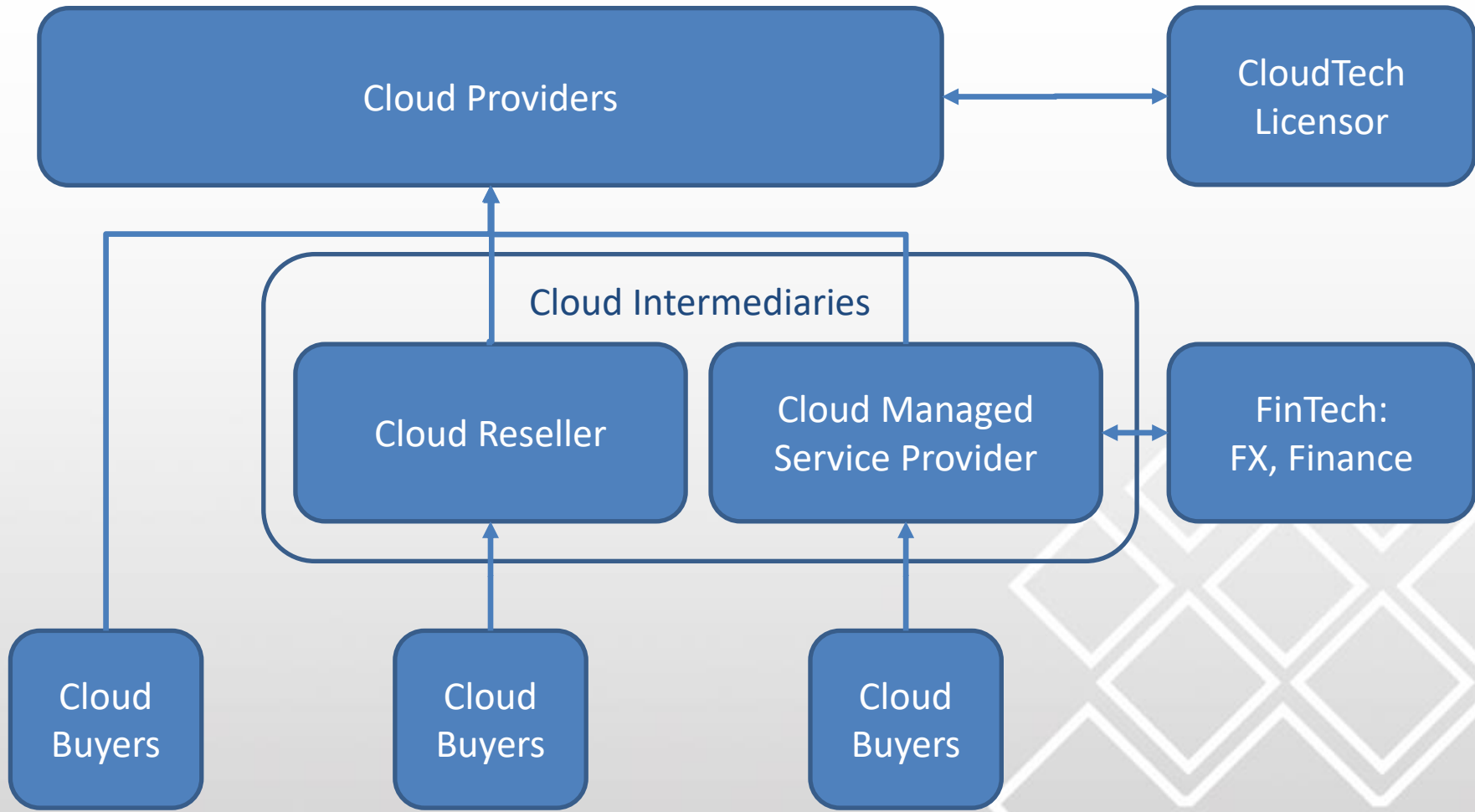
Cloud watch
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**Roadmap to a Cloud
Market Structure
Encouraging Pricing
Transparency
First Iteration**

April 2016

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Market Structure is Maturing



More Choice for Buyers

- ◆ Some choice of competing Cloud Technologies
- ◆ Use same Cloud Technology with multiple Cloud Providers
- ◆ Use same Cloud Provider, but purchase direct or via Intermediary
- ◆ Purchase on Cloud Provider's terms or Reseller terms or MSP terms



Interoperability

- ◆ Financial Interoperability: GOOD.
 - ◆ It is easy to change who you pay for cloud
 - ◆ Move seamlessly between direct, Reseller and MSP

- ◆ Technical Interoperability: POOR.
 - ◆ It remains hard to switch cloud technology
 - ◆ Easier for base IaaS services
 - ◆ Harder for value-added IaaS and PaaS services

Becoming Easier to Specialise

- ◆ More mature market enables specialisation
- ◆ If a specialist can thrive, then a new entrant can compete
- ◆ If new entrants can compete, innovation thrives.
- ◆ If innovation thrives, European digital economies will thrive.



Recommendations to EC

- ◆ Encourage “Excellence through Specialization” in Digital Single Market
- ◆ Enable Specialization by encouraging outsourcing of non-core tasks
- ◆ Protect existing ways of outsourcing non-core financial risks
- ◆ Ensure that Cloud Intermediaries can compete, supporting Digital Specialists
 - ◆ Do this by enforcing EC Directives around Control of Resale



Final Version of Roadmap



Have your say...

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