

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

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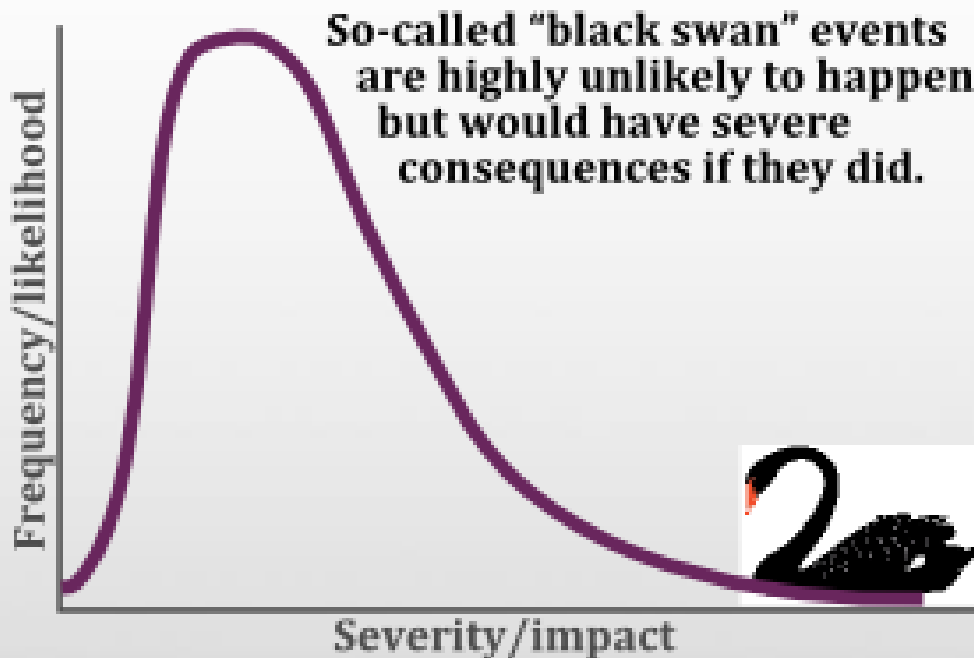
# Why care about cloud market structure?

- ◆ 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.

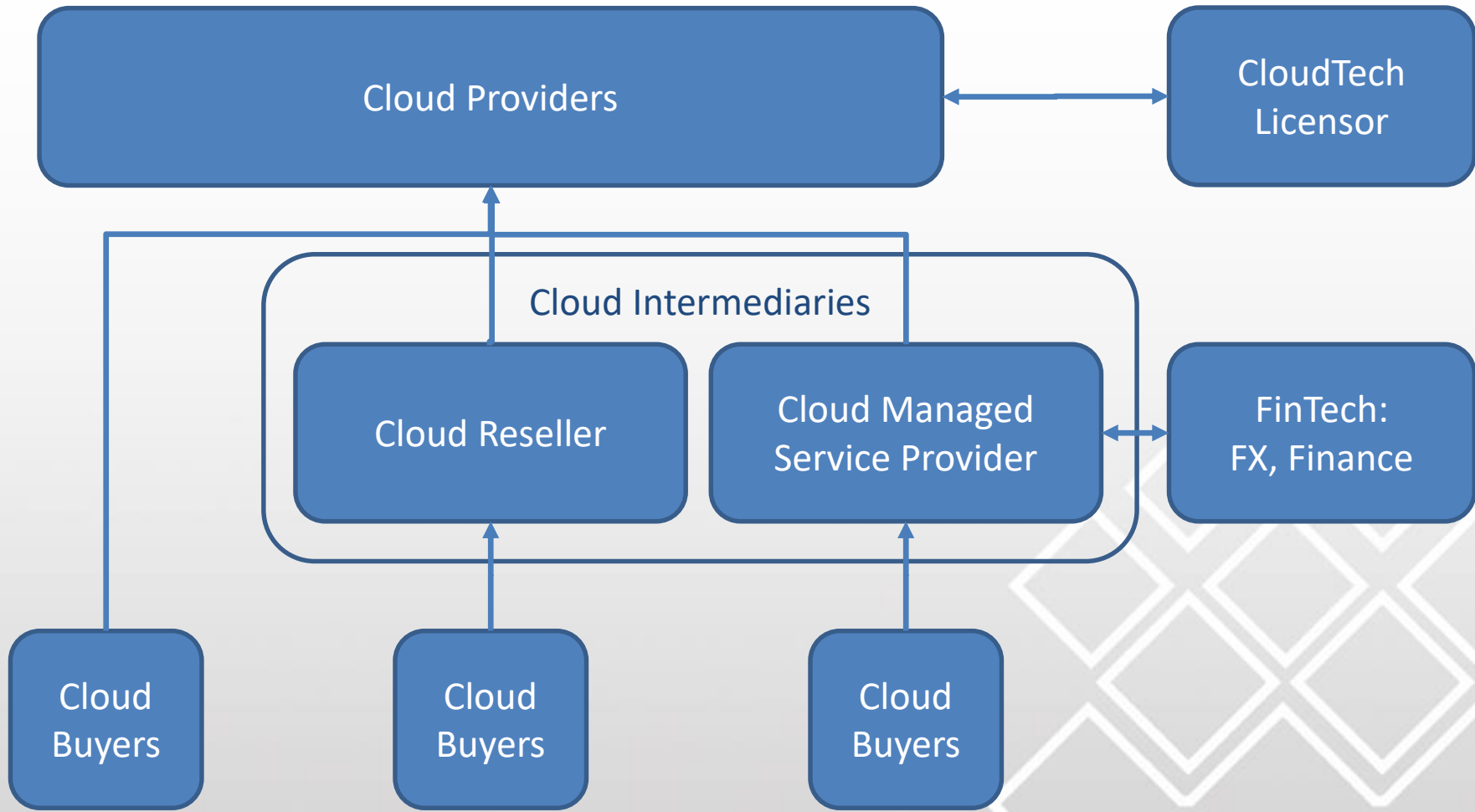
**Cloud watch**  
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**Roadmap to a Cloud  
Market Structure  
Encouraging Pricing  
Transparency  
First Iteration**

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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.



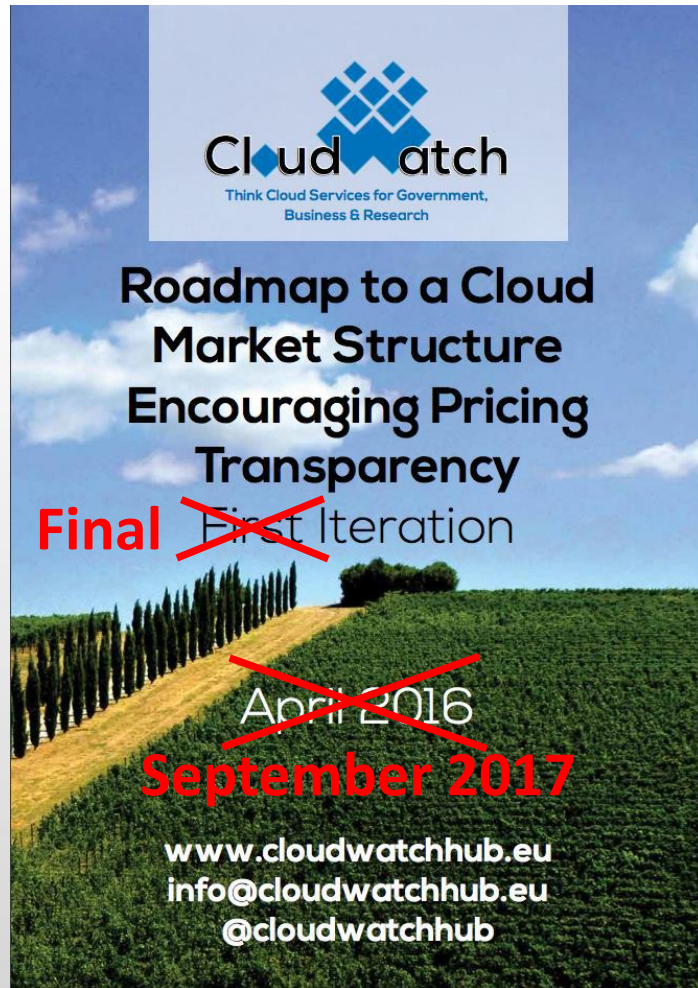
# Recommendations to EC

- ◆ 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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