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Accelerating Digital Innovation with Cloud

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Accelerating Digital Innovation with Cloud

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At a **glance**

The content of this report is based on the **IDC Cloud Benchmark Survey 2021**, covering a sample of **700 IT and business decision makers** from across EMEA.

Key stats

The research showed a correlation between cloud adoption and increased business performance. In particular, 35% of respondents reported increased business and IT productivity, 27% reported higher revenue/profit, and 22% reported improved security, governance, and compliance.

On top of this, 96% of Cloud Innovators (high cloud maturity) reported that they have achieved these positive business outcomes and more.



What's important

Getting your cloud journey right is critical to remain competitive and meet increasing customer and employee expectations.

Working with a partner accelerates and de-risks your cloud journey.

Key takeaways

Achieving cloud and digital innovation success is an iterative journey. No matter what maturity level you are at, continuously experiment, optimize, and innovate.

The research shows cloud adoption and maturity will skyrocket. Innovators will accelerate away from their competitors. Don't get left behind!

Introduction and **Executive Summary**

Why do you need cloud-based digital innovation now?

Digital transformation is no longer just a priority, it is an imperative to ensure customer loyalty, efficient supply chains, thriving partner ecosystems, and competitive advantage in the digital age.

Digital transformation is built on cloud technologies. IDC estimates that by 2023, over 40% of enterprises will replace outdated operational models with cloud-centric models that facilitate rather than inhibit organizational collaboration, resulting in better business outcomes.

2020 has been a tipping point for cloud adoption, driven by the unprecedented disruptions from the pandemic. IDC has seen an acceleration in the adoption of cloud technologies because they provide the agility and flexibility that organizations need to adapt quickly to a changing environment. Customer engagement mobile applications, employee engagement, task applications, safe return to work applications, ecommerce platforms, mobile banking solutions, call centers, chatbots, digital twins, and many more have been built on the cloud and enabled organizations to deal with the effects of the pandemic effectively, surging ahead of their competition.

Cloud is the engine of digital transformation, and it is important to get cloud transformation right enterprise wide. In 2021, the European IaaS public cloud market is set to grow 30.3%, higher than both SaaS and PaaS. Cloud is not just “someone else’s computer,” but requires new technical and business skills, organizational change, new roles, and new work methods.

For an effective transition to the cloud, IDC recommends these winning strategies for cloud success:

- Defining the right cloud strategy
- Building cloud foundations
- Modernizing applications
- Ensuring security and compliance
- Implementing cloud operations and governance
- Applying continuous innovation, resilience, and data programs to become a future enterprise

Engaging in cloud-based digital innovation successfully requires the implementation of a complex set of processes and technologies. To benefit from previous experience and ensure success, it is recommended that organizations engage with a competent technology partner.

IDC undertook cloud adoption research, including a benchmark survey, to assess where organizations are on their cloud journey, as well as exploring their attitudes, usage, and future outlook of the cloud in achieving their business outcomes. The research benchmarks organizations on three stages of their cloud journey — **Cloud Experimenter, Cloud Optimizer, and Cloud Innovator.** The research reveals that organizations with more cloud experience are running their cloud infrastructure more effectively and driving a greater degree of digital innovation than their competitors.

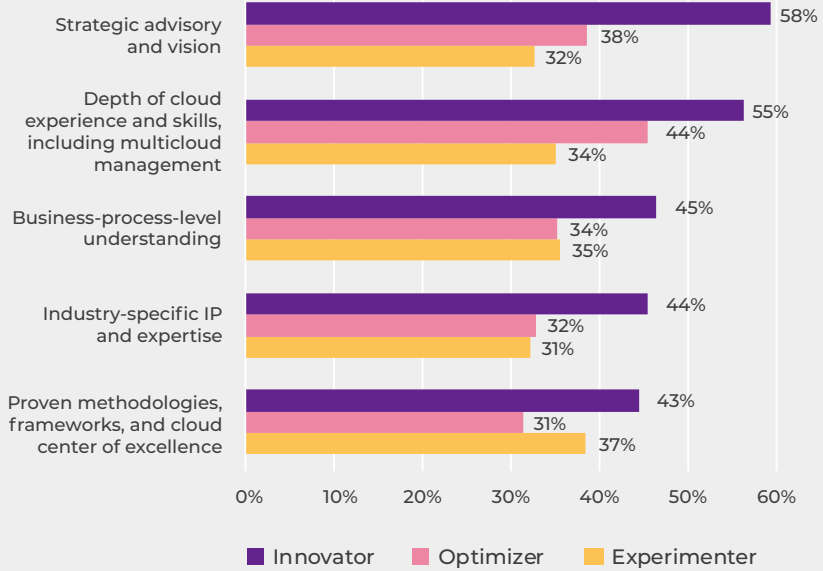
Getting your cloud journey right is critical to remain competitive and meet increasing customer and employee expectations. IDC's cloud benchmarking survey shows that 96% of cloud innovators (the most experienced cloud users) have realized business benefits from their cloud implementations, compared to only 73% of cloud experimenters (the less experienced). What is even more important to note is that a high proportion of even the less advanced cloud users are still seeing business benefits.



But that is not all. The survey revealed that choosing the right partner for your cloud-based digital innovation journey is important, and Cloud Innovators value the following attributes in their cloud technology partner:

- Strategic advisory and vision of the partner
- Depth of cloud experience and skills, including multicloud management
- Business-process level understanding
- Industry-specific IP and expertise
- Proven methodologies, frameworks, and cloud center of excellence

Figure 1: Valuable cloud partner attributes



Source: IDC, 2021 Cloud Benchmark Survey, N=700

In this paper, IDC analyzes the results of its 2021 Cloud Benchmark survey of 700 IT and business decision makers from across the EMEA region and shows what we can learn from the most experienced organizations.

Defining Cloud and the Role of Cloud

At the broadest level, the types of deployment models for cloud services are public and private (See IDC's Worldwide IT Cloud Services Taxonomy, 2019, IDC #US45714519).

- **Public cloud services** are shared among unrelated enterprises and/or consumers, open to a largely unrestricted universe of potential users, and designed for a market, not a single enterprise.
- **Private cloud services** are shared within a single enterprise or an extended enterprise, with restrictions on access and level of resource dedication, and defined/controlled by the enterprise, beyond the control available in public cloud offerings.



Cloud in its various forms (on-premises private cloud, public cloud, hybrid, and multicloud) has become the “de facto” architecture for modern IT and digital transformation (DX) across Europe for business agility, flexibility, scalability, security, and innovation.

Business Benefits of a **Cloud-Based Digital Innovation Strategy**

Cloud accelerates the testing, development, and deployment of services that are natively designed for consumption across multiple channels (online, mobile apps, chatbots). It brings elasticity to meet usage spikes for high-volume services such as seasonal retail services, tax returns, student applications, or event management.

Figure 2: **The biggest value gains due to cloud usage**



35%
Increased Business and IT Productivity



27%
Higher Revenue/Profit



25%
Lower Cost of IT



27%
Improved Security, Governance & Compliance



19%
Improved Digital Customer Experience

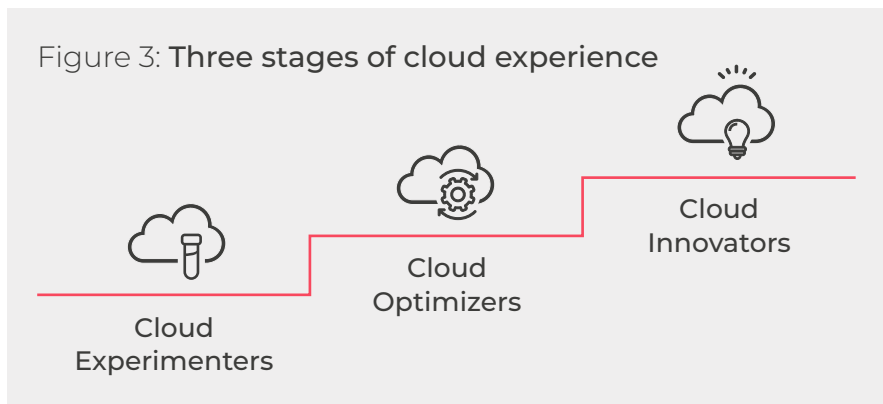
Source: IDC, 2021 Cloud Benchmark Survey, N=700

Once these aims have been met, organizations often start to look at how to identify new revenue streams from the digitally transformed foundation.

Introducing the IDC Cloud Benchmarking Framework

To be successful in the cloud it is good practice for organizations to learn from successful peers. This can help build confidence, mitigate the risks, and help to outline expectations. To help enterprises determine where they currently are and gain visibility into how their peers are adopting cloud, IDC has created a cloud benchmarking framework with three stages of cloud experience:

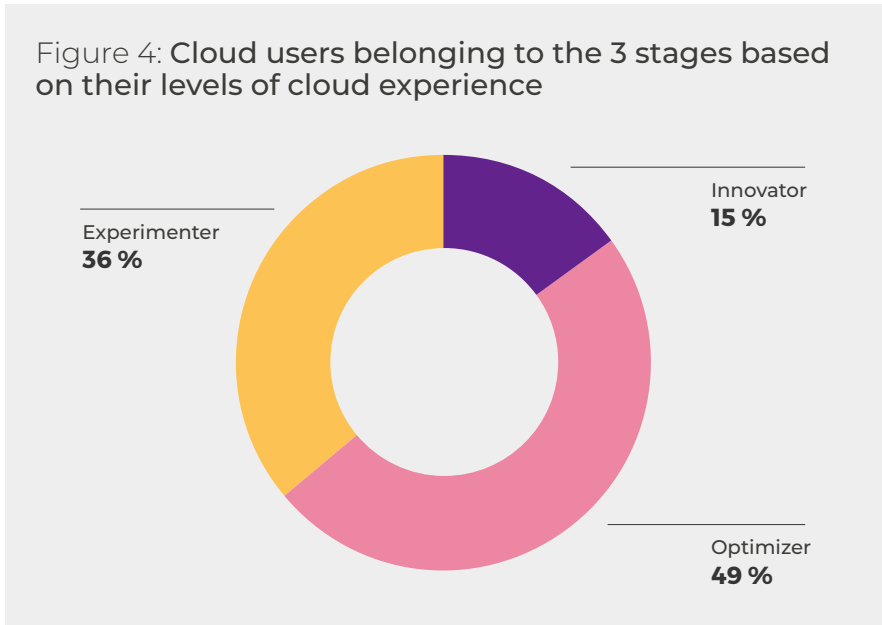
- **Cloud Experimenters**, that are at the beginning of their cloud journey
- **Cloud Optimizers**, that have already gained experience in the cloud
- **Cloud Innovators**, that are driving digital business transformation based on cloud



Source: IDC, 2021 Cloud Benchmark Survey, N=700

Cloud is mainstream and is emerging as a bedrock for building an IT foundation suitable for a digital enterprise. However, not all users are leveraging the cloud equally.

As part of IDC's cloud benchmarking framework, cloud users are categorized in the 3 stages based on their cloud experience and usage as shown in Figure 4.



Source: IDC, 2021 Cloud Benchmark Survey, N=700

A large portion of European cloud users (49%) are currently in the cloud optimizer category, which means they have already gained some experience in the cloud, but they still need to improve to move into the cloud innovator category.

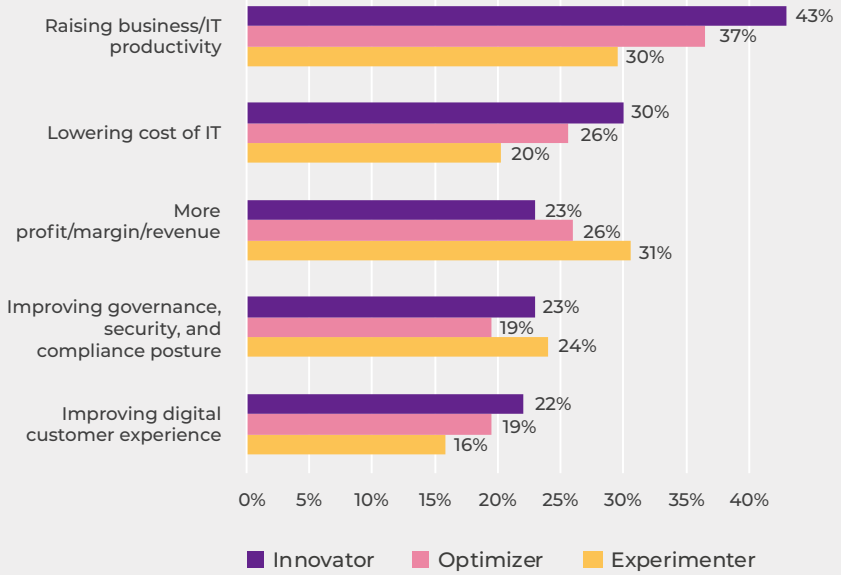
Ultimately, to build a competitive edge, all organizations aspire to be Cloud Innovators. IDC's research reveals that the Cloud Innovators have a mature, modern cloud foundation with the following hallmarks:

- It has an agile, scalable, interoperable infrastructure ecosystem spanning edge to core to cloud.
- It can support both modern business-critical applications and cloud-native applications on the same platform principles.
- It has data pipelines on top of it allowing federated data at the application level.
- It facilitates new ecosystem-based business models, operating models, and revenue streams.

IDC's 2021 cloud benchmark survey clearly shows that cloud innovators are more likely to drive business outcomes from their cloud strategy than their less experienced peers. As illustrated in Figure 5, the 96% of cloud innovators that achieved positive business outcomes were able to:

- Increase business and IT productivity
- Lower the cost of IT
- Improve their governance, security, and compliance posture

Figure 5: Innovators achieve better business outcomes from cloud

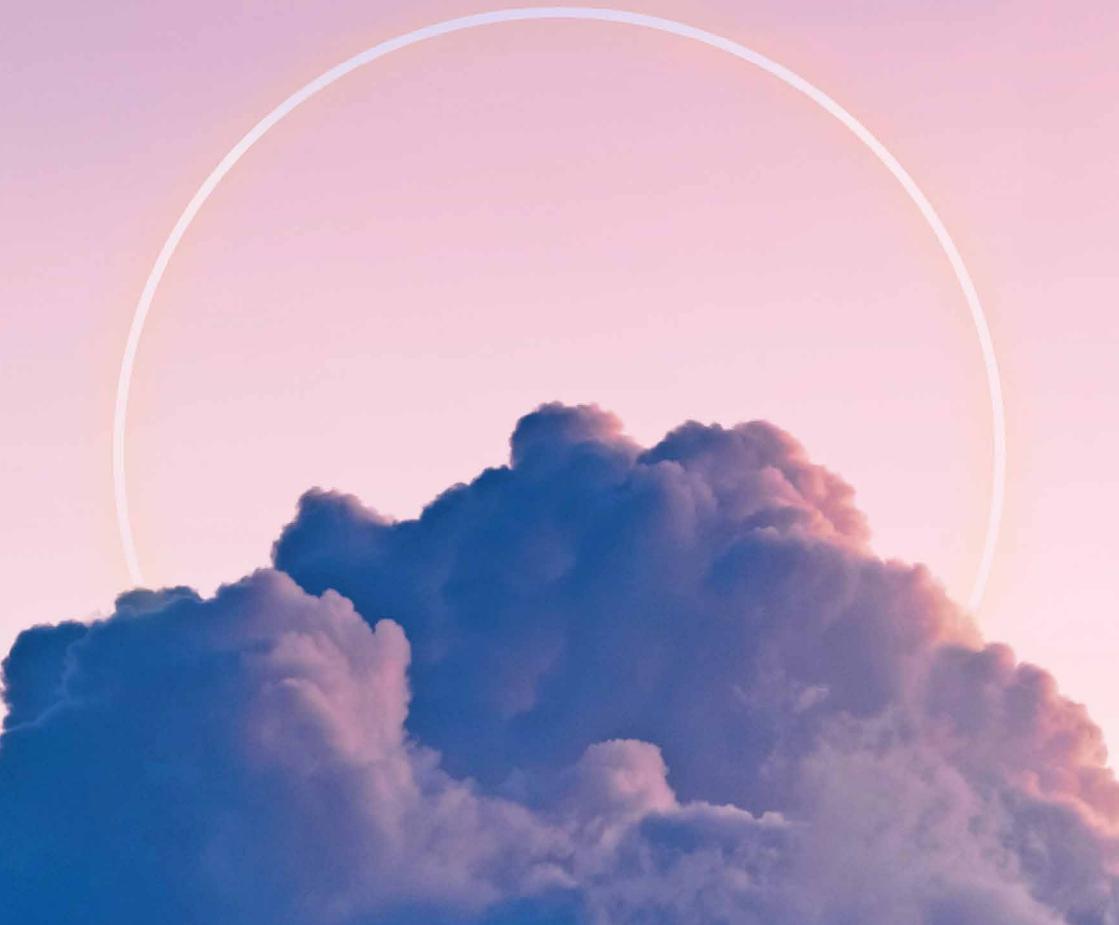


Source: IDC, 2021 Cloud Benchmark Survey, N=700

Not all organizations have the same maturity when it comes to achieving digital innovation with cloud. Where do you stand today?

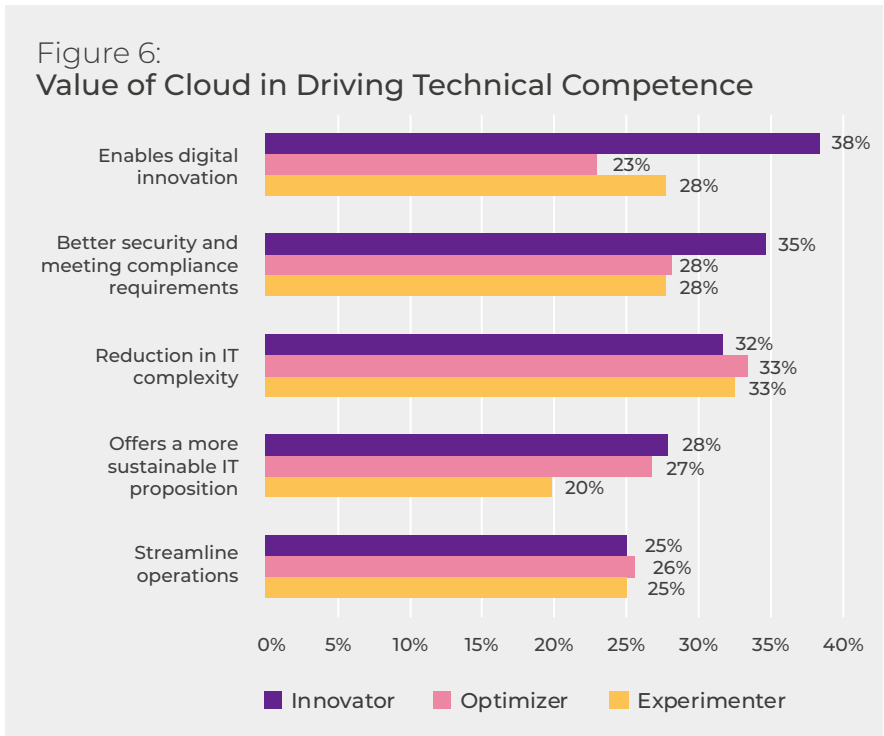
Complete this 10-question assessment to find out!

[Take the test](#)



Value of Cloud in Driving Technical Competence

In addition to the business benefits, cloud innovators are also realizing technical benefits from their cloud implementations, as shown in Figure 6. Cloud is the key enabler for digital innovation, but also provides better security and compliance than on-premises IT.



Source: IDC, 2021 Cloud Benchmark Survey, N=700



Cloud users were assessed across three main dimensions to determine their progress in leveraging the cloud for digital business innovation. IDC developed 3 pillars for the Cloud Benchmarking Framework and assessed the respondents across each of the pillars.

The 3 pillars of the cloud benchmarking framework are:



Plan and Architect



Build, Secure, and Optimize



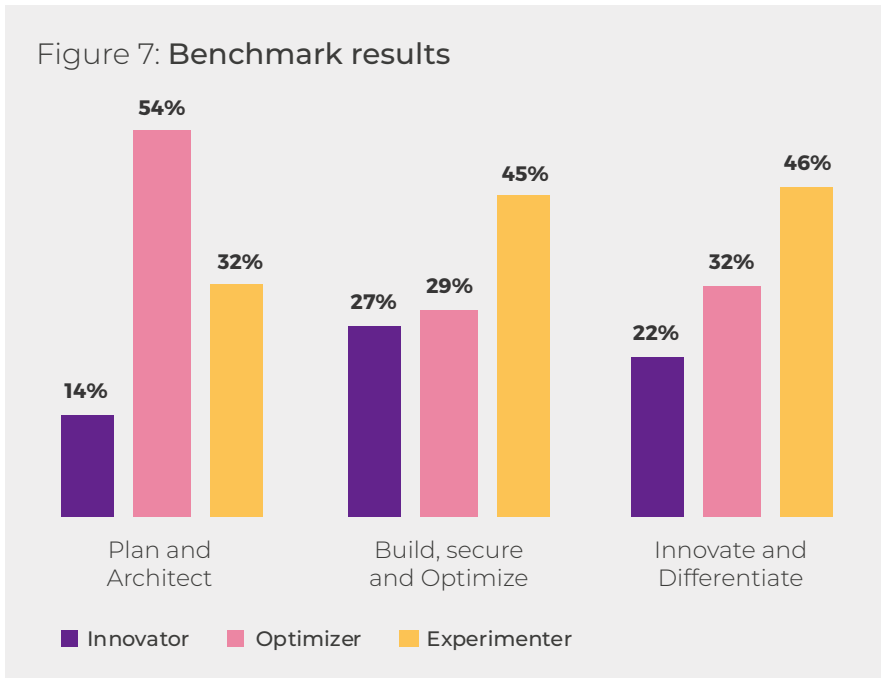
Innovate and Differentiate

The research revealed that organizations with a successful cloud-based digital innovation strategy excel in mastering all the three pillars of the cloud framework.

However, only a small percentage of European organizations (15%) have truly excelled across each of the three pillars to achieve cloud innovator status.

To be a cloud innovator, organizations need to excel holistically and demonstrate maturity in each of these pillars.

Figure 7 shows the benchmark results by pillar. In the Plan & Architect pillar, 52% of EMEA organizations are at the second level — cloud optimizer. In the Build, Secure & Optimize pillar, 45% of EMEA organizations are Experimenters at the beginning of their cloud journey and in the Innovate & Differentiate pillar, 46% of EMEA organizations are in the experimenter category.



Source: IDC, 2021 Cloud Benchmark Survey, N=700

Cloud skills are further developed at the beginning of the cloud journey, as more organizations have started to put their cloud strategies into actionable plans, while building, securing, and optimizing cloud environments at scale. Using cloud as a platform for innovation remains a challenging task for EMEA organizations, mainly due to a lack of skills and practical experience.



Key Traits of a Cloud-Based Digitally Innovative Enterprise

EMEA organizations that are Innovators on their cloud journey display a certain set of traits that set them apart from their competitors and that other organizations following in their footsteps can learn from.

14% of EMEA organizations are Innovators in the Plan & Architect stage. They exhibit the following traits:

- Innovators in the Plan & Architect stage can operate different cloud deployment models, including private & public cloud, hybrid, and multicloud effectively and at scale.
- They exhibit an industrialized and strategic use of cloud with very clear governance and management processes. They plan which workloads will run in which cloud model and why.
- Sustainability is essential and corporate rules are in place to choose the most sustainable provider.

27% of EMEA organizations are innovators in the Build, Secure, & Optimize stage. What makes them successful are the following capabilities:

- Organizations that are innovators in the build, secure, and optimize stage have aligned their cloud strategy with their business strategy and adopted automated governance, risk, and compliance-centric cloud management including proactive monitoring and remediation of issues and full alignment with business stakeholders and business strategy in place.

- They modernize their application estate with cloud-native technologies and execute a strategy of widespread business process and IT transformation affecting the entire application estate.
- An API-first integration strategy with full alignment between the business and IT strategy is a key priority to drive a modern and efficient application strategy.
- Security and compliance processes are in place to manage the entire IT estate coherently from on-premises to cloud.

22% of EMEA organizations are innovators in the Innovate & Differentiate stage. They are successful and charging ahead of their competitors because they focus on the following traits:

- Organizations that are innovators in the innovate and differentiate category maintain a mix of in-house and externalized capabilities via 3rd party software/app development providers to provide software and custom application development and delivery capabilities.
- They have set up a Center of Excellence with full alignment to the business strategy to drive their innovation based on cloud as well as efficient cloud operations.
- Senior leadership is deeply involved in the cloud and digital innovation strategy and has put clear metrics and KPIs in place to measure cloud change management and business value gained.

What We Can Learn from the Leaders

Plan & Architect – Cloud Vision & Strategy

Planning and architecting for the cloud requires addressing people, process, and technology transformation aligned to the cloud operating model.

Organizations excelling in this pillar understand that one of the first steps on the cloud journey is to clearly define immediate to long-term business objectives such as business model innovation, accelerated delivery, and automation strategies. With clear outcomes set, leading organizations work backwards to plan the application and data move to the cloud, identify the skills, assess the workloads, and clearly define the wider set of people and IT capabilities needed to deliver on these strategic objectives.

Defining outcomes and the required strategic capabilities helps to ensure the cloud architecture that is right for the business whether it is hybrid cloud, multicloud, private cloud, or public cloud. This delivers on expected business outcomes.

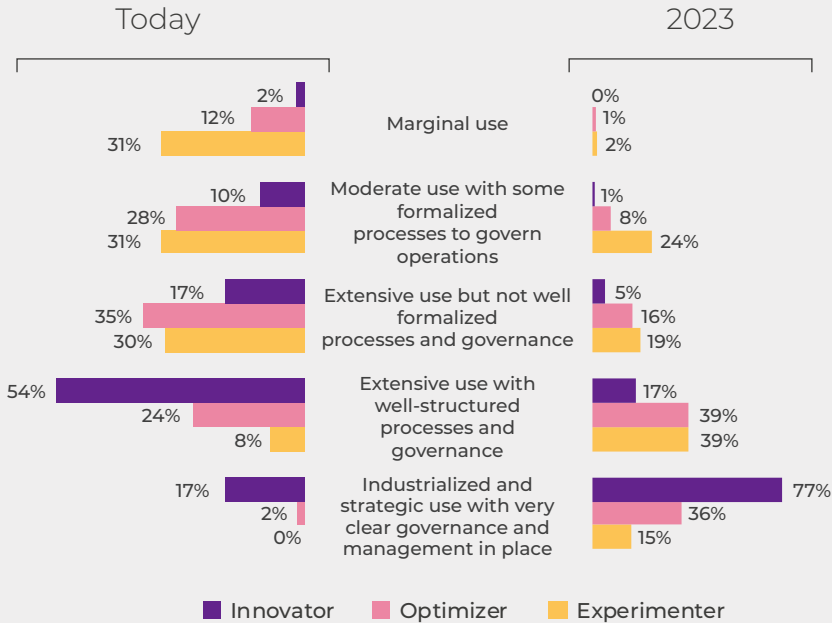
Which Cloud Strategies Are the Cloud Innovators Following?

Cloud innovators have a higher propensity to see cloud of all types as important architectural models in their IT strategy and vision, compared to cloud experimenters and optimizers. A higher number of cloud innovators than average mention digital innovation as a key cloud priority.



Cloud innovators are anticipating their organizations will make an even more massive shift towards cloud in the next two years. As shown in Figure 8, currently around 17% of cloud innovators describe their cloud usage as “industrial and strategic with clear governance and management in place.” But 71% of cloud innovators expect their cloud usage to reach that industrial scale by 2023.

Figure 8: Cloud usage today and in 2023

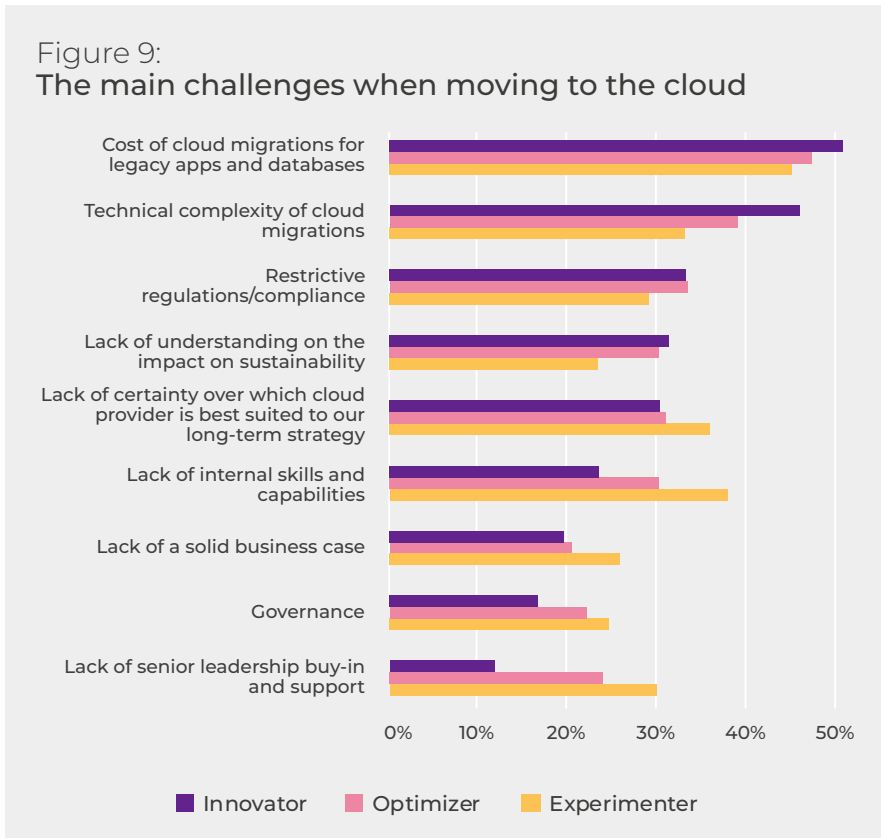


Source: IDC, 2021 Cloud Benchmark Survey, N=700

Overcoming Cloud Challenges

The innovators are also focused on overcoming strategic cloud challenges in the Plan and Architect phase. Primary challenges such as lack of solid business case or lack of boardroom buy-in are not key challenges for innovators. As they are further ahead in the journey, the key challenges they are facing are complexities and costs in migrating legacy apps and databases to the cloud, or governance, as shown in Figure 9.

Figure 9:
The main challenges when moving to the cloud



Source: IDC, 2021 Cloud Benchmark Survey, N=700

Build, Secure, and Optimize – Operational Excellence in Cloud Management, Application Modernization and Security

The build, secure, and optimize pillar looks at which workloads/applications should run on which cloud provider for optimal price/performance and how to introduce cloud-native technologies like containers and APIs.



Cloud has achieved mainstream status thanks to its ability to host any workload with suitable optimizations and security policies. With the use of orchestration, automation, and analytics-driven management, leading organizations can better understand issues such as resource utilization to drive continuous optimization.

Building new applications and services on cloud-native technologies reduces the complexities of monolithic application, increases its portability, and ultimately brings agility and speed to both IT and the business.

As we are in an ever-changing world with a diverse global customer base, digital applications and services need high availability at any location while being fast, secure, scalable, and agile — all key traits of the cloud-native stack of a mature organization.

Security Priorities Remains High in Cloud Migration Journeys

Cloud security is the key foundation for cloud success, and EMEA organizations across the board prioritize cloud security and digital trust. Without cloud security and digital trust, customers and partners will not trust an organization with their data, which in turn is the foundation for new digital products and services. 39% of all respondents choose data security (DLP/CASB) as their number one cloud security priority. Beyond that, threat and vulnerability management is ranked number 2 (29%) and data sovereignty is number 3 (26%).

35% of innovators prioritize digital security and trust compared to only 25% of cloud experimenters. More than a third of cloud innovators also choose cloud citing better security and compliance, compared with 29% of total respondents.

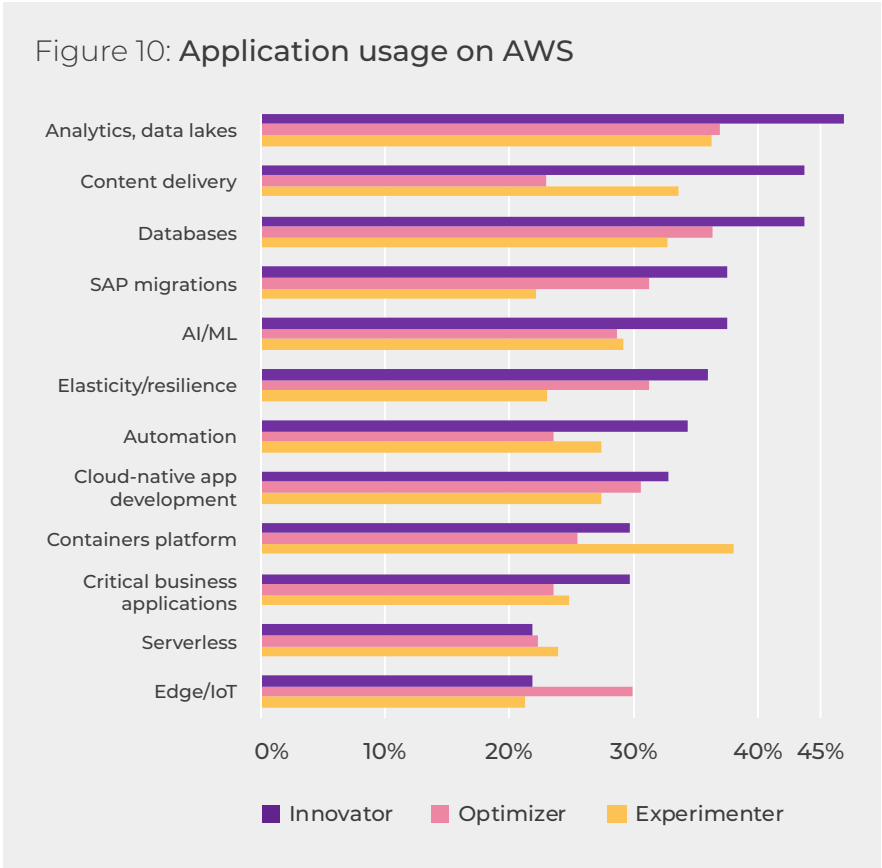
The research also shows that 57% of all EMEA organizations and 63% of innovators chose an external partner to reinforce their cloud security capabilities.

41% of innovators rate capabilities such as hybrid/multicloud management as most important compared to 33% of average responses. A higher number of innovators cite automation and cloud-native app development as important capabilities compared with experimenters and optimizers. Innovators are also much more strategic and prefer to choose the best cloud for a given workload.

Choosing the right cloud provider for the right applications is a complex process.

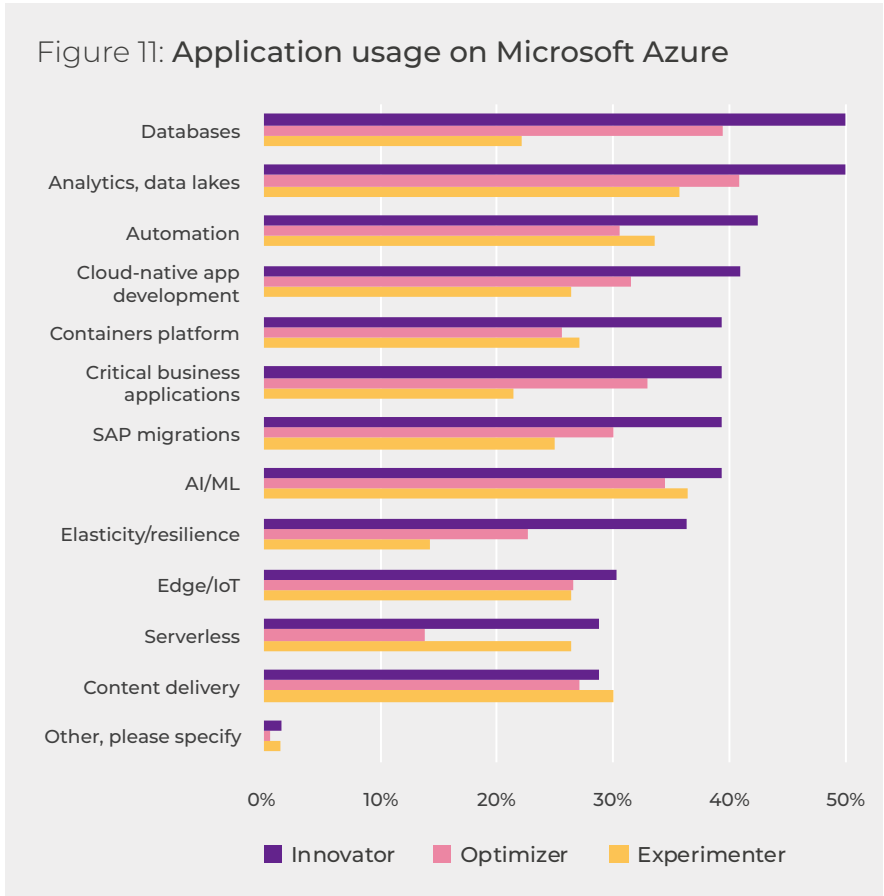
IDC used the Cloud Benchmark survey to test which applications organizations are hosting across the three major cloud providers, see on the following pages.

Figure 10: Application usage on AWS



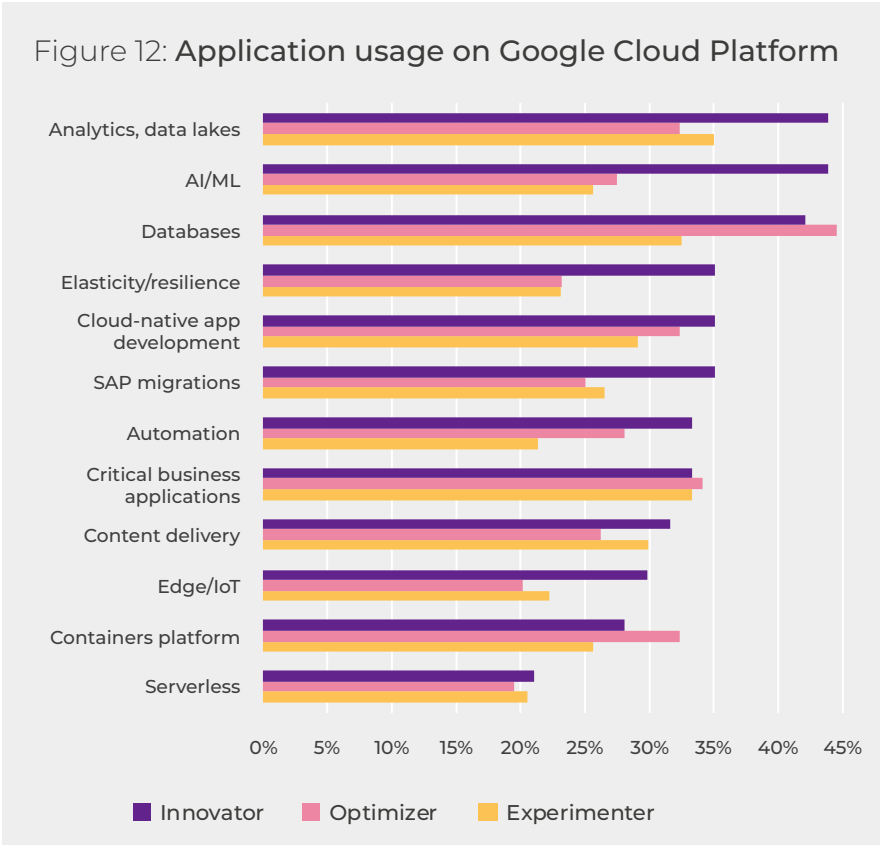
Source: IDC's 2021 Cloud Benchmark Survey, N=334

Figure 11: Application usage on Microsoft Azure



Source: IDC's 2021 Cloud Benchmark Survey, N=409

Figure 12: Application usage on Google Cloud Platform



Source: IDC's 2021 Cloud Benchmark Survey, N=338

Innovate and Differentiate – Transcending Beyond Cloud as a Destination to Cloud as an Innovation-Enabler

Successful organizations are fast moving beyond seeing cloud just as a more agile infrastructure or destination for their workloads. They see it as a springboard that delivers “innovation accelerators” such as AI/ML at scale, automation, next-gen security, and integrations.

89% of innovators in the Innovate and Differentiate pillar cite that they have achieved positive business outcomes as a result of using cloud. Innovators of this pillar also cite mature business value gains such as data mining, business productivity boosts, and improving customer experiences.

The value of the cloud for these organizations lies in its ability to provide instant access at scale to the most innovative technologies and help create and deliver new digital products, services, and experiences at inspiring speed.

Innovators Capitalize on Technology Innovation More Than Optimizers or Experimenters

IDC research revealed that 58% of innovators run a container environment compared with 50% of experimenters and optimizers. All innovators implement API integration, with 60% following an API-first integration strategy with full alignment with the business and IT strategy. Only 1% of cloud experimenters and 10% of optimizers follow an API-first integration strategy, indicating a clear technical edge for innovators.

Digital innovation opens new addressable markets, drives operational efficiency, improves customer experience, and ultimately transforms the business model into an agile enterprise of the future.

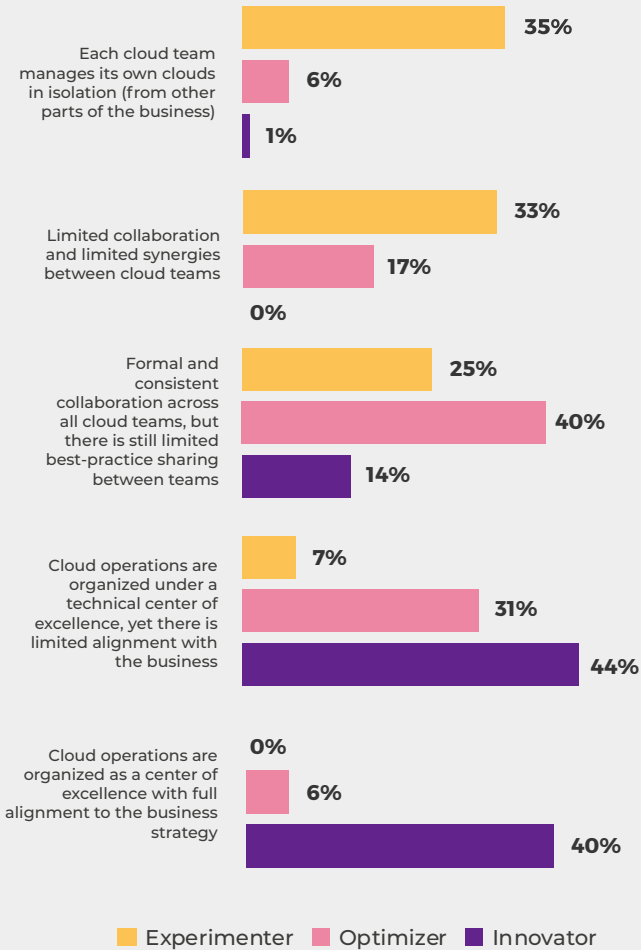


Impact of Successful Cloud Strategy in Fueling Business Innovation and Benefits

The research highlights how innovative organizations are moving beyond the tactical use cases of cloud to much more strategic and transformational use of cloud. For example, 35% of Cloud Experimenters cite that each cloud team manages its own clouds in isolation compared to fewer than 1% of innovators. On the other hand, 85% of innovators have set up a cloud center of excellence to drive innovation via cloud compared to 7% of experimenters and 37% of optimizers.

Cloud innovators rank digital innovation as the top benefit of cloud followed by better security. Overall respondents ranked tactical benefits such as reduced IT complexity as number one.

Figure 13:
Organizational setup to drive innovation via cloud



Source: IDC's 2021 Cloud Benchmark Survey, N=338

Strategic Cloud Differentiators of the Future — Sustainability

Sustainability is a topic that innovators are taking very seriously, and it is one of the reasons why innovators will accelerate ahead of their competition. 60% of innovators have already put strict rules in place to choose the most sustainable supplier when issuing an RFP, compared with only 8% of experimenters. The focus is on CO₂ emissions reduction across all respondents. A higher number of innovators think it is important to track production efficiency, consumption of utilities, energy sources, and supply chain energy consumption for sustainability objectives.

The initiatives around sustainability are led by the chief sustainability officer or the CEO for innovators, whereas for others it is CIO/Head of IT driving the sustainability agenda. This clearly shows that sustainability is a key strategic priority for the CEO and will impact decisions about which cloud provider to choose in the future.



The Path to Cloud-Based **Digital Innovation**

Cloud-based digital innovation is the key to competitive differentiation, and European organizations expect an acceleration in the use of cloud over the next two years. To realize the business benefits from cloud, it is important to understand where you are on the cloud journey and what the next steps are.

Cloud innovators are far more successful in realizing business benefits from cloud than experimenters or optimizers. They are making industrialized and strategic use of cloud services with very clear governance and management in place. They align their cloud strategy with their business strategy and adoption of automated governance, risk, and compliance-centric cloud management including proactive monitoring and remediation of issues.

They modernize their application estate with cloud-native technologies and execute effective cloud governance strategy at scale.

IDC predicts that to gain business agility, enterprises will commit to modernizing up to 50% of their existing applications by 2023 using turnkey cloud-native development and deployment services.

Innovators have also set up centers of excellence with full alignment to the business strategy to drive their innovation based on cloud as well as efficient cloud operations. Senior leadership is deeply involved in the cloud and digital innovation strategy and has put clear metrics and KPIs in place to measure cloud change management and business value gained.

The time to act is now as a tectonic shift is happening with the majority of organizations having a cloud-first strategy for their applications. **38% of applications are already migrated to the cloud, and by 2023, 70% of the application landscape will be migrated to the cloud, according to IDC research.** Cloud innovators are driving this tectonic shift by planning to migrate as much as 87% of their applications to the cloud by 2023 to develop a clear competitive advantage.

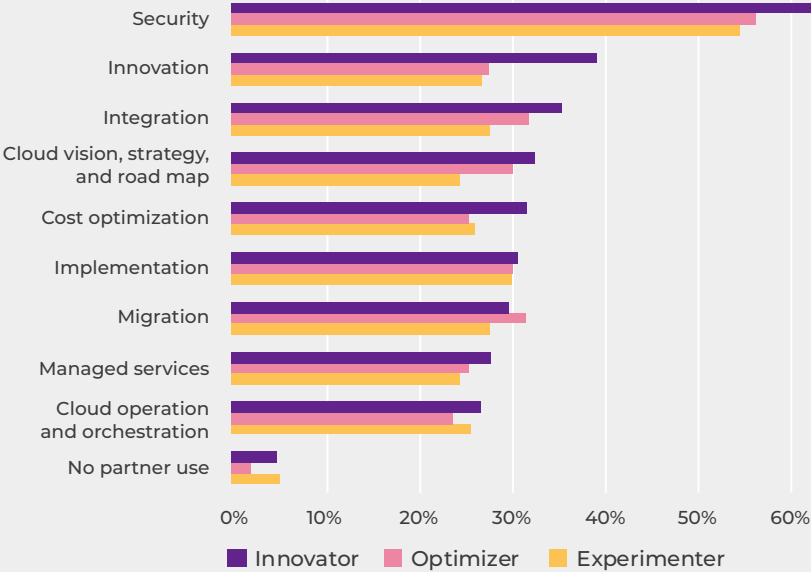


Choosing the Right **Cloud Services Partner**

As EMEA organizations are struggling with the cost and complexity of cloud migrations and a severe cloud skills shortage, choosing an external strategic cloud services partner is critical for executing a successful and accelerated cloud-based digital innovation strategy. Innovators are more likely to use an external partner than those organizations less advanced on their cloud journey.

The primary area where EMEA organizations are engaging an external partner is in security, because getting cloud security right is the foundation for digital trust and the success of digital business models. The second area where external partners add value is by driving digital innovation and developing new digital business models and revenue streams based on digital products and services.

Figure 14: Where EMEA organizations are using an external partner on their cloud-based digital innovation journey



Source: IDC, 2021 Cloud Benchmark Survey, N=700

Conclusion and Recommendations

Cloud adoption will accelerate at a staggering pace in the next two years, and the most advanced organizations today will outperform their competitors significantly both through their advanced use of cloud and their ability to drive digital innovation and real business benefits from their usage of cloud.

EMEA organizations can benefit from the best practices pioneered by their innovator peers and from the usage of external partners who codify these best practices into repeatable service offerings that can help organizations to accelerate their own cloud journeys.

While the complexity and cost of cloud migrations can be overwhelming at times, security and digital trust are the foundation for a successful cloud implementation.

Sustainability has emerged as a key differentiator between the leading organizations and their peers, and EMEA organizations are advised to formulate their own sustainability goals and processes.

For organizations wanting to accelerate cloud-based digital innovation, IDC recommends the following:

- Assess where your strengths and weaknesses are when it comes to using cloud for digital innovation and determine your next step to take you forward.
- Be inspired by and learn from EMEA organizations that have taken the journey before you and learn from their experiences and best practices.
- Find an external partner that can help you fill some of the capability gaps and provide guidance along the way.

Appendix

Defining Key Cloud Terms

Public cloud services are shared among unrelated enterprises and/or consumers, open to a largely unrestricted universe of potential users, and designed for a market, not a single enterprise.

Private cloud services are shared within a single enterprise or an extended enterprise, with restrictions on access and level of resource dedication, and defined/controlled by the enterprise, beyond the control available in public cloud offerings.

Hybrid cloud: IDC defines hybrid cloud as the usage of IT services (including IaaS, PaaS, SaaS apps, and SaaS-SIS cloud services) across one or more deployment models using a unified framework. Hybrid cloud services include “public-public,” “public-private,” and “private-private” combinations. Cloud and non-cloud combinations (sometimes referred to hybrid IT) where the non-cloud applications are front ended with cloud services interfaces (e.g., RESTful APIs) are also included. Examples include:

- A customer using a public cloud IaaS service while also consuming the same IaaS portfolio on a dedicated local cloud-as-a-service (LCaaS) platform in the customer’s datacenter or edge location.
- A customer using a hosted private cloud system while also consuming a dedicated LCaaS platform in the customer’s datacenter.
- A customer using a common cloud automation/operating environment (open or proprietary) across more than one public cloud and/or on an LCaaS, a hosted private cloud, or an enterprise private cloud.

Multicloud: The term multicloud is sometimes used in the industry as an alternative to hybrid cloud. However, for IDC, multicloud is a description of an organizational strategy or the architectural approach to the design of a complex digital service that involves the consumption of cloud services from more than one cloud service provider. These may be directly competing cloud services such as hosted private cloud versus public cloud compute services, public object storage from more than one public cloud service provider, or IaaS and SaaS from one or more cloud service providers. In both contexts, multicloud encompasses a much larger universe than hybrid cloud and is only gated by the cost/complexity associated with enabling consistent management/governance of many different cloud options.

Multicloud is also a growing focus when it comes to management products/services that allow an enterprise to effectively administer/govern (configure, secure, cost control) its expanding portfolio of different cloud-based infrastructure, data sets, and applications from multiple cloud service providers.

Since the start of the cloud era, multicloud management has been offered as a multicloud services contract by managed service providers. Today, multicloud management also includes a growing portfolio of packaged and SaaS-delivered multicloud management software solutions that automate or replace some managed services elements.

The adoption of open standards to enable use of a multicloud architecture for complex applications or for defining and monitoring cloud resource and data streams can make it easier to extend the value of multicloud architectures and management, but they are not a prerequisite at this time.

Survey Demographics

IDC conducted a survey of 700 IT and business decision makers from across EMEA. The survey demographics are:

- 100 respondents in each of these countries/regions: France, Germany, UK, Benelux, Nordics, Iberia, and Middle East
- A mixed sample of organizations with more than 500 employees: 18% 500-999 FTE, 22% 1000 – 2499 FTE, 15% 2500-4999 FTE, 16% 5000 – 9999 FTE, and 27% 10000 FTE plus
- A balanced approach across verticals with a focus on financial services organizations
- 80% IT and 20% LoB decision makers
- 55% of respondent organizations adopted cloud more than two years ago, 45% adopted cloud in the past two years
- 48% of respondents used AWS, 58% of respondents used Microsoft Azure, 48% used Google Cloud Platform (GCP)

Cloud Benchmark Assessment methodology

Based on 9 questions from the survey, respondents were grouped into three capability levels across three pillars. The three pillars are:

- Plan & Architect
- Build, Security & Optimize
- Innovate and differentiate

The three capability levels are:

- Cloud experimenter
- Cloud optimizer
- Cloud innovator





MESSAGE FROM THE SPONSOR

For Devoteam, Cloud opens the door to a field of unparalleled possibilities.

Cloud has reached a pivotal moment in its development. After a time of experimentation, followed by active but disjointed use, companies are now looking to maximize the benefits and make it their platform for transforming into a “digital company”.

Most large companies today use multiple Cloud providers, very often combined with on-premises systems. The challenge is maintaining this diversity, guaranteeing independence, innovation, and optimal levels of service — while also maintaining control and ensuring security, compliance, service quality, and manageable costs.

Devoteam offers a full range of Cloud services, enabling businesses to speed up their innovation processes, boost their agility, improve their operational efficiency, and optimize their costs.

Gert Jan van Halem,
Distributed Cloud Director, Devoteam

About **the Authors**



Carla Arend

Senior Program Director, Lead Analyst
Cloud in Europe

Carla Arend is a senior program director with the European software and infrastructure research team and heads up IDC's European cloud research. Arend provides industry clients with key insight into market dynamics, vendor activities, and end-user adoption trends in the European cloud market. As part of her research, she covers topics such as how European organizations are adopting cloud, how cloud drivers and inhibitors are evolving, cloud management, cloud security, data management in the cloud, IoT and cloud, AI and cloud, DevOps and cloud, as well as GDPR impact on cloud and cloud code of conduct.

In addition to syndicated research, Arend has worked on many custom consulting projects identifying opportunities in the European cloud market and has authored white papers on subjects such as cloud management, cloud security, data management in the cloud.



Archana Venkatraman

Research Manager
IDC European Datacenter Research

Archana Venkatraman is a research manager for IDC's European Datacenter Research. She covers datacenter technologies including software-defined infrastructures, storage and data management, virtualization, containers, hyperconverged infrastructure, infrastructure performance monitoring, systems management, application development, and cloud services.

Archana also leads IDC's European thought leadership program on open-source technologies. She also contributes to European Digital Transformation, DevOps, Blockchain and IoT research practices.



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IDC UK

5th Floor, Ealing Cross,
85 Uxbridge Road
London
W5 5TH, United Kingdom
44.208.987.7100
Twitter: @IDC
idc-community.com
www.idc.com

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Corporate Headquarters

140 Kendrick Street,
Building B, Needham,
MA 02494 USA
508.872.8200
www.idc.com





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