PAC

VENDOR LANDSCAPE

CLOUD

GFT

The UK service provider market is highly heterogeneous, and the onset of the cloud has further reinforced this.

PAC performed a study to understand how the UK service provider market is evolving and to identify strongly placed service providers.

From the insights of that study, this whitepaper provides an overview of the evolving UK cloud landscape for CxOs and the valuable role of a cloud service provider.

> Given the evolution and complexities of the UK cloud market, PAC assessed the cloud platform and compute services landscape to identify vendors best positioned to support UK organisations. After a detailed assessment of the UK cloud vendor landscape, PAC placed GFT as a UK cloud finalist due to its strength and experience as a system integrator for organisations navigating multi and hybrid cloud strategies and operations. GFT demonstrated a holistic approach to cloud management through a framework that brings the key disciplines of architecture, organisational design, delivery, cost management and security into one service. All of these can support CIOs in establishing or refreshing a cloud strategy fit for their organisation's needs based on the learnings of GFT to mitigate the complexities of the cloud.
>
> Spencer Izard, Research Director, PAC

How is the UK cloud landscape evolving for CxOs?

The UK is the largest market for hyper-scale public cloud services in Europe, with all the big three firms (e.g., Amazon, Google, Microsoft) generating significant in-country revenue. Consumption of cloud services by UK organisations across all industries continues to grow apace year on year. The simplicity of the label cloud belies a highly diverse range of technologies that rarely leverage a common approach to operational governance, charging models, and technical integration and security. As more and more organisations migrate to a cloud-first strategy, they often find it challenging to gain an aggregated operational and financial view from the patchwork of consumed services across public, private, multi and hybrid cloud operating models – as well as combining that with any on-premise technology services they still may operate. Whether it is a software, platform, or compute cloud service, the ability for an organisation to adopt at pace is considerable compared to the timescales of pre-cloud IT deployments.

PAC believes multi-cloud is an inevitability and can be argued already exists. In recent years there have been numerous predictions on when the year of multi-cloud will occur or become mainstream. For most UK organisations, multi-cloud has existed for the past few years through a combination of hyperscaler compute (e.g., Amazon, Google, Microsoft) and software-as-a-service (SaaS) business applications (e.g., Salesforce, ServiceNow, Workday). So, the challenge faced by CIOs is how to manage a rapidly changing IT estate evolving from on-premise and managed-service models to a cloud-native multi-cloud approach via an interim hybrid transition over several years. Of course, specific use cases within industries still require a non-cloud approach due to regulations or an operational preference and will maintain an element of hybrid.

What are the cloud complexities CxOs have to navigate?

Cloud solutions and services have been designed to have a low barrier to entry for fast adoption by organisations, but this ease of consumption belies growing operational and cost challenges. The perimeter-less nature of how organisations consume cloud services makes them more complex to manage and secure, especially in scenarios where one or more business operating models within an organisation requires a composite service underpinned by data traversing several cloud services of different types.

The nature of the public cloud means that pre-cloud mechanisms for operating and governing IT usage can see cloud sprawl occur, increasing costs and increasing risk exposure to security breaches through inconsistent practices. Cloud services are individual stand-alone 'islands' of technology outside the organisation's traditionally secure technology perimeter. It is now essential for organisations to adopt a cloud strategy to ensure data security, service costs and operational risks are managed consistently and thoroughly across a dispersed and varied range of external services. Many organisations are already facing challenges due to the rate they consume cloud services and the diversity of how each needs to be operated. This leads to CxOs asking themselves one or more variations of the following questions:

- How do I avoid cloud sprawl, often called shadow IT, where I'm unaware of what services are being used and at what scale?
- How do I accelerate the on-boarding and off-boarding of a cloud service to ensure my end-users are not frustrated, but the cloud service adheres to our policies?
- How do I simplify the usage, security and data monitoring processes across all my organisation's cloud services?
- How do I ensure that using a range of cloud services meets my organisation's compliance and regulatory demands?
- How do we manage capacity and usage levels in an elastic manner that fits the operating cadence of our organisation?
- How can we identify performance issues and optimise accordingly across a range of cloud services that are often interconnected in how they are used?
- How do I control the costs of operating multiple cloud services with different consumption and costing models during the current economic climate and beyond?

How can cloud services companies support CxOs?

Regardless of the industry, all organisations continue to face the need to evolve how they operationally provision, manage and deliver services internally and externally. A range of technologies has created a perfect storm at the heart of this change, commonly delivered through a cloud model. The volume and velocity of data are at the heart of business changes required to compress time to market/delivery, provide elastic scalability of compute resources and the ability to adopt and operate new cloud services securely and at pace. Automation, artificial intelligence and edge computing are examples of technologies continuing to drive change through cloud services and solutions. In parallel, organisations must evolve their culture, adapt operating practices, and retrain employees – all whilst maintaining service quality and consistency.

In recent years, the societal and economic circumstances the UK has been navigating have continued to drive a skills shortage related to architecting, securing, governing, costing and innovating the range of cloud capabilities needed to meet organisational demand. CxOs are under pressure to accelerate the evolution of their organisations whilst minimising cost. This is where identifying the right trusted partner – such as GFT – can help organisations transition to the cloud through a skilled and experienced resource base. The right partner can help a CIO's IT function in the transition to the cloud through its experience and understanding of the ideal operating model to adopt that manages both the technical and financial needs of an organisation.