Leading cloud provider in Germany
The Big Cloud Computing Check

Telekom, Amazon Web Services (AWS), Microsoft- or Cancom, Computacenter and Bechtle? Read who is in the leading position in the German market for cloud computing in 2016.

In its "Cloud Vendor Benchmark 2016" study, the Experton Group has already analyzed the seventh time the range of cloud providers on the German market. In the first quarter of 2016, more than 450 providers were identified, offering cloud technologies, services and transformation services. 155 players were considered "relevant" by Experton, so that they were selected for a detailed analysis and positioning.

As Heiko Henkes in principle recognizes, an analyst at the ISG-acquired Experton Group, many companies with the digital transformation "are hopelessly overburdened. This is not only due to the complexity of the interplay of many IT trends and the associated change management, but also the necessary cloud transformation, which is often not yet advanced.

Cloud- Transformation partner: IBM at the front

"The Cloud Transformation" segment is about consulting and integration. According to Experton it is noticeable that many suppliers focus on technology and the interplay of components - on integration tasks. But the preliminary consultation is becoming more and more important. In addition to modernizing the infrastructure, customers also want to talk about digital business models and information security. Trends such as big data/ analytics, the Internet of Things or cloud-based infrastructures make this absolutely necessary.

As a result, the analysts call the following criteria, according to which the cloud transformation service providers were evaluated:

- Thought Leadership to Cloud and Transformation
- Portability and depth of consulting and system integration
- Service quality is proved by customer satisfaction
- Balance between consulting and system integration
- Strategic focus on cloud transformation
- References and projects in the local market
- Awareness and image as a Cloud Transformation Provider
- Local team strength and partner country

Experton notes, that there are not yet many presentable cloud transformation projects in Germany. As a provider in the "Leader" quadrant, IBM, Deutsche Telekom, Atos / Canopy and Hewlett-Packard Enterprise are among the leaders. It is striking that system builders such as Cancom/ Pironet, Dimension Data and Computacenter have also moved far forward. Acentrix, named as "Rising Star" last year, was the first to leap into the Leader quadrant.

Managed Private Cloud: Telecom at the top

The Managed Private Clouds segment is concerned with projects, in which company-critical and thus highly confidential workloads are placed in the hands of a service provider. Here, the customers main thrust is not only depending on functions and features, but also on the reliability and stability of the provider. The key question is also whether the position to cloud computing is clear in its company strategy and product roadmap.

The evaluation criteria in detail are as follows:

- Powerful, scalable RZ- infrastructure (global RZ network advantageous) including WAN-optimizer and carrier and technology provider partnerships
- Individualized levels of SLAs with modular support models and 24/7 operation with "enterprise grade" SLA and disaster recovery offerings; fast response Customer Service
- Interoperability (support for multiple operating systems and virtualization and orchestration technologies)
- Cross-site data center and infrastructure management
- Virtual-to-Virtual Conversion with live operation (productive)
- Know-how, services of the next higher PaaS and SaaS stack (operating system, database, WebServer, app and license management)
- Integration of third-party vendors and legacy platforms
- Implementation, maintenance
- Security optional as a "Managed Service"
- Certifications or knowledge in IT service and project management, including industry-specific compliance guidelines for process modeling

As a leader, Experton has identified T-Systems International (TSI), followed by IBM, Cancom, BT and others. These projects are particularly interesting for the providers, since they are about individual design and therefore high margins. Especially in the IoT environment, production-related systems such as the Manufacturing Execution System (MES) are increasingly being used for predictive maintenance approaches. Such projects mostly remained in the private cloud - on the spot or at a reliable, also locally based service provider.

IaaS from the Public Cloud (Self Service): AWS remains top

The market for Infrastructure as a Service (IaaS) from the public cloud is growing rapidly. If the volume of sales is currently 600 million euros, it is set to climb to 2 billion euros in 2019. Above all, public storage offers boost demand. The criteria on which the providers were measured are:

- Easy access via test and trial versions and price transparency
- Powerful and extremely flexible data center infrastructure (local location advantageous, global network)
- A broad portfolio of infrastructure services (compute power, storage for file services, network, backup, etc.)
- High degree of allocation and automation of the platform optional virus scanners, vulnerability scans, and intrusion prevention
- Automated rollouts, failover concepts, and Anti-DDoS Services
- PAYG as well as reserved resources with automatic "uplink" to the dynamic or highly elastic and expensive resource pool

- High user-friendliness of the admin interfaces - "ease of use"
- Provision of Standards and Mechanisms to Ensure Performance (CDN Services) and Security (Public Internet Bypassing Tools)
- Wide partner and ecosystem Template libraries with preconfigured virtual appliances or apps
- Ensure integration & interoperability through API
- Offer of database tools as well as block storage
- Supply of container services for easy app migration
- Offer of dedicated resources for sensitive workloads

Amazon Web Services (AWS) is positioned in the leader quadrant, followed by Microsoft and Deutsche Telekom (T-Systems and Deutsche Telekom Business Unit = TDG). IBM, Google, Atos and Oracle have also made it to the top group. According to Experton, the market lights up, since not all vendors have withstood the inexorable price fights. Especially local providers could hardly keep up with the "Hyperscaler- Giants". On the other hand, new players with favorable cost structures are entering the market: Experton explicitly names the duo Deutsche Telekom and Huawei with the "Open Telekom Cloud".

At the same time, analysts are finding that providers are moving closer to their customers by building data centers in Germany, for example, to dismantle privacy policy and to offer better latencies. T-Systems is the trustee of the Microsoft Azure Cloud, and Cancom is cooperating with IBM to use its own computer resources as well as soft-player resources.

Local service providers who want to participate in this market, recommend the analysts to look for one of the large Hyperscaler as partners. Not only the tough price competition seems to be a good thing to do, but also the innovation leaps that can be expected here could not be achieved by small suppliers. Simply upgrading the cloud in the context of block-chine functions shows what disruptive power the technology has on our economic cycle - not just on the financial sector, but also on traditional industries.

The original article can be found at http://www.computerwoche.de/a/der-grosse-cloud-computing-check,3314540