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Cloud UK

Paper eighteen

Cloud and the channel – Threat or opportunity?

18

White Paper No. 18 - June 2016

Introduction

The traditional IT channel has something of a complicated relationship with Cloud computing. For those organisations that have chosen to adapt and develop their business models to make a success of Cloud, there are tremendous opportunities. All market analysts predict an increasingly Cloud dominated world and, as demonstrated in Cloud Industry Forum's (CIF) research papers, end user adoption of Cloud services is climbing year-on-year. Our latest research on the UK end user market found that 80% of businesses are using Cloud services to some extent and that 63% of businesses can foresee a time when they move all of their IT to the Cloud. But as demand for Cloud services increases, demand for traditional, CapEx based IT necessarily decreases – sales of which have seen some steep declines.

Today, roughly two-thirds (65%) of the UK IT channel offers Cloud services as a part of their portfolio to their clients. While this represents only a small increase from the last time that this research was conducted in 2012, it is clear that the channel's engagement with the delivery model is deepening. Those organisations selling Cloud services offer an increasingly sophisticated portfolio and are shifting their business models to become Managed Service Providers (MSPs), able to better support clients throughout the entire IT transformation.

It is important to note, however, that the move to Cloud is not without its challenges. Respondents in this research project identified a wide range of organisational, cultural and skills-related issues impeding their ability to sell and support Cloud effectively.

Moreover, while sales of Cloud services have increased, many resellers are still developing sales models that allow them to manage their cash flow whilst ensuring differentiation, competitive advantage and monetisation. Vendors have a critical role to play in helping the channel to overcome these challenges and assisting partners through the complete sales cycle, from product/ solution education and lead generation, through to migration, account administration and technical support.

For the many thousands of traditional IT resellers, the shift from selling CapEx based on-premise technology to IT as-a-service is not an easy one and the vendors that win will be those who support the channel through that transition. While the majority of the channel feel that their vendors are providing them with competitive advantage and are supporting them on their journey to the Cloud, over a quarter do not and many would like more assistance.

This research project examines the perceptions of the IT channel in regard to the maturity, attractiveness and risks of offering Cloud-based services to end user organisations. From these learnings, our sponsor, Intermedia, has devised a best practice checklist for partners highlighting the key attributes that they should look for in channel programmes to make a success of Cloud.

This White Paper summarises the results of this research and sets out to comment on the following:

Those organisations selling Cloud services offer an increasingly sophisticated portfolio and are shifting their business models to become Managed Service Providers (MSPs), able to better support clients throughout the entire IT transformation

Methodology and sampling

In April 2016, Vanson Bourne conducted a third body of research on behalf of the Cloud Industry Forum to determine the level of Cloud adoption within the traditional IT channel. This research, sponsored by Intermedia, enables trends to be identified from the previous channel research commissioned by CIF in 2010 and subsequently 2012. We also draw upon the findings from our latest end user-focused research (conducted in Q4 2015) to explore trends, changes and disparities between the channel and the end user community.

The research was specifically targeted at organisations that have the aspiration or capability to deliver Cloud services (e.g. Systems Integrators, Managed Service Providers and technical VARs). All responses are from senior business decision-makers from UK-based companies.

Of the 150 channel organisations questioned, 19% considered their businesses to be purely transactional*, whereas the majority considered themselves as offering technical services**.

The research was specifically targeted at organisations that have the aspiration or capability to deliver Cloud services (e.g. Systems Integrators, Managed Service Providers and technical VARs). All responses are from senior business decision-makers from UK-based companies

* **Transactional:** Organisations primarily focused on selling IT as point solutions designed to solve particular problems.

** **Technical:** Organisations that offer comprehensive value added services such as design, implementation, integration and support.

1. Channel adoption of Cloud services

65% of the UK IT channel offer Cloud services today; with the majority of those describing their services as consulting and implementation of private Cloud/systems integrators (75%) or as public Cloud providers (65%). In 2012 – the last time we conducted research on the IT channel's attitudes towards Cloud – 63% of the UK IT channel offered Cloud services, up from 61% in 2010.

In which sector does your organisation primarily operate?

	2016	2012
Cloud consulting and implementation of private Cloud, systems integrators	75%	52%
Public Cloud service providers, telcos, web hosters, strategic outsourcers	65%	33%
Solutions focused on industry/business process – e.g. Cloud delivered CRM	48%	55%
Cloud technology provider – resale of software license or SaaS delivered model, hardware and tools	42%	32%

This figure contrasts with the growth of Cloud deployment with end users. Over that same time frame, the end user Cloud adoption rate has increased from 49% to 78%. Moreover, 75% of Cloud users expect to increase their usage this year, and 63% can foresee a time when they will move everything to Cloud.

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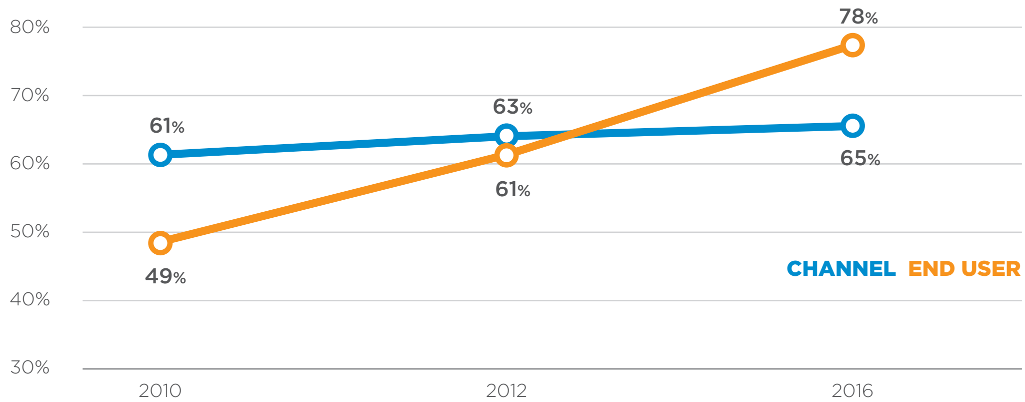
Does your organisation currently offer any Cloud-based services?

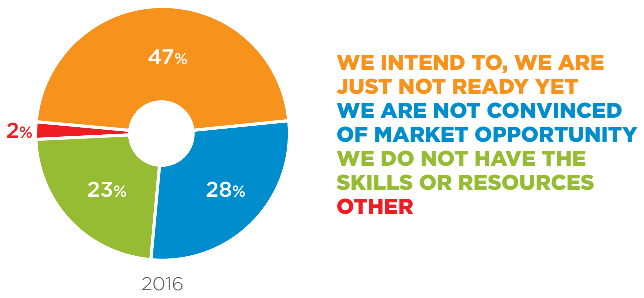
Does your company have any hosted or Cloud-based services in use today?



Looking to the future, it is likely that the IT channel will accelerate as they identify the vendor and partner propositions they need. Of those organisations not currently offering Cloud services, almost half (47%) expect to do so in future.

However, despite the fact that almost all respondents (99%) recognised the potential benefits of Cloud for their organisations in future, a significant minority have no immediate plans to offer Cloud services. Of those not currently offering Cloud services, 28% are not yet convinced of the market opportunity and 23% do not have the skills or resources.

What is the primary reason that your organisation does not offer Cloud-based services?



It is important to note that while the breadth of IT channel organisations offering Cloud services appears to have plateaued somewhat (at least for the time being), those that are engaging with Cloud do so with much greater confidence and commitment. Over the past four years we have seen significant progress in terms of the depth of Cloud services offered and channel organisations' Cloud implementation, management and contracting capabilities.

Of those in the channel offering Cloud, it is the minority (18%) that just resell services, with the remainder offering some sort of value-added or Managed Services. For example, over two thirds manage the customer interface, 58% deliver their own solutions, while half provide a managed service.

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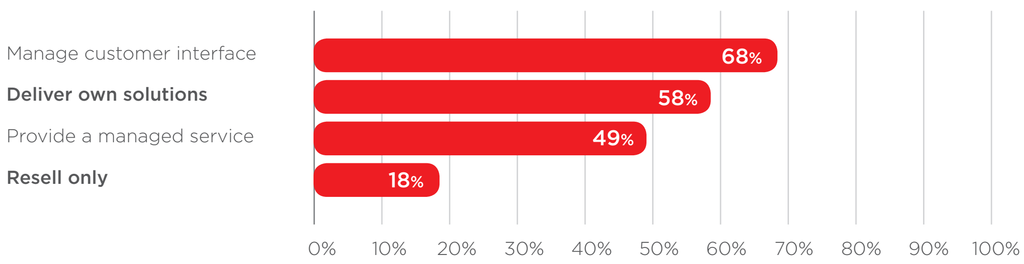
Does your organisation resell these services or does it offer and manage its own? (2016)



Encouragingly, the vast majority (79%) offer implementation services to help customers to migrate to the Cloud, up from just 59% in 2012. This is a key part of demonstrating competence to end users and an important area in which the channel can demonstrate its value in the Cloud market place. From our end user-focused research we know that migration can be a challenge; most rely on the channel; just 15% of end user organisations handle the design, selection and implementation themselves, and many organisations encounter unforeseen difficulties along the way.

It is clear that the channel is assuming a much more active role in the delivery and management of Cloud services for customers, which is critical if Cloud service deployments are to be effective. Some 70% manage the bandwidth connectivity requirements for customers, up from 57% in 2012, while 78% offer SPLAs (Services Provider Licence Agreement). In a similar vein, three quarters (75%) offer licensing advice for the applications being used.

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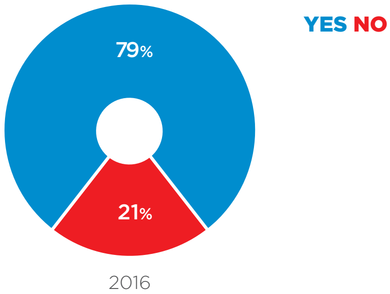
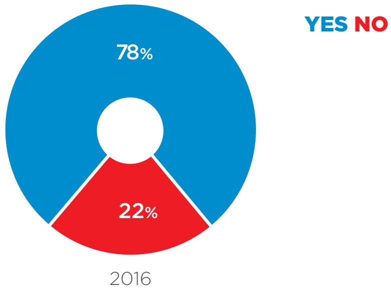
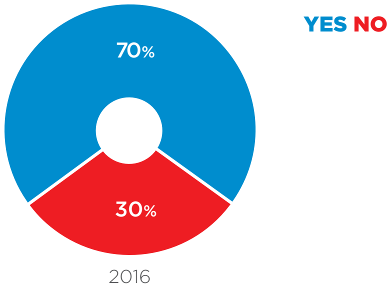
Does your organisation offer implementation services for migrating to the Cloud?



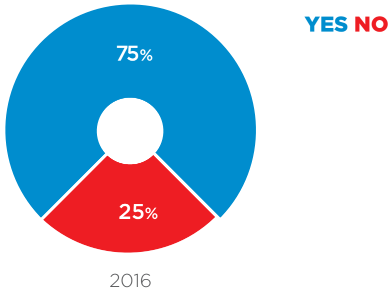
Does your organisation offer Services Provider Licence Agreement based licensing to its customers?



Does your organisation manage the bandwidth connectivity requirements between on-premise and hosted/ Cloud IT as part of its solution?



Does your organisation provide its customers with licensing advice for applications?



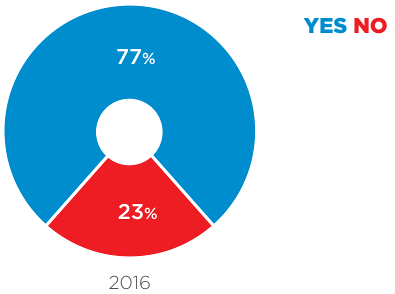
As further proof of the channel's commitment to Cloud service provision, we have seen increases in data centre investments over the past four years. Over half of channel organisations operate their own data centres and a similar proportion co-locate at a third party data centre.

Does your organisation operate its own data centre, co-locate at a third party data centre or use OEM services?

	2016	2012
Co-locate at a third party data centre(s)	57%	42%
Operate own data centre(s)	56%	39%
Use OEM services as a private label solution	36%	31%
Use any data centre depending on the customer requirement	32%	22%

In terms of pre-sales activity, the number of companies that actively consult on the delivery of Cloud services has increased from 64% in 2012 to 77% today, representing a return to the levels recorded in 2010. Lack of expertise, perceived lack of demand and fear of appearing biased emerged as the top reasons given for not doing so.

Does your organisation actively consult on the delivery of Cloud-based services?



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Services offered

Consistent with the last research project, Software-as-a-Service (SaaS) is by far the most utilised Cloud model through the channel, offered by three quarters of respondents. Considered the easier and more commoditised entry point to Cloud for most end users, this comes as little surprise. The gap is, however, decreasing, and we have seen a marked increase in those organisations offering Platform-as-a-Service (PaaS) and Infrastructure-as-a-Service (IaaS), the former inevitably being more complex Cloud adoption or migrations.

Which of the following service models does your organisation offer?

	2016	2012
SaaS	74%	81%
PaaS	64%	28%
IaaS	45%	29%
Cloud aggregator	37%	-
BPO	21%	-

The channel, reflecting the breadth of services currently being adopted by the end user community, offers a wide and growing range of SaaS-based services. Today, the average channel organisation has around eight SaaS services they offer their clients, up from just five in 2012.

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CRM (51%), data storage (47%) and managed IT services (46%) are the SaaS services most likely to be offered, and like many of the other services listed in this research, have seen significant increases.

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Which of the following SaaS services does your organisation offer?

	2016	2012
CRM	51%	39%
Data storage services	47%	27%
Managed IT services	46%	35%
Data backup/disaster recovery services	42%	25%
IT asset management services	42%	19%
IT operations management	38%	22%
IT security services	32%	25%
Accounting and finance applications	29%	30%
Collaboration services	26%	14%
Email services	25%	35%
Document management	18%	22%
Sales management	18%	8%
Webhosting	18%	23%
Test and QA services	17%	9%
Unified communications	17%	8%
Office automation/productivity	15%	8%
Partner relationship management	15%	1%
Service management/help desk services	15%	12%
Video conferencing	15%	5%
VOIP	15%	13%
Advertising and online marketing services	14%	10%
Personnel and payroll	13%	8%
eShop services	10%	8%
Workflow systems	4%	10%
Average number of services offered	8	5

PaaS is the fastest growing Cloud deployment model in the channel, and it is clear that partners are offering an increasingly broad range of platforms for their customers. AWS, IBM Bluemix, and Microsoft Azure dominate here, though a significant minority offer more niche and specialist services such as Engine Yard and AppFog.

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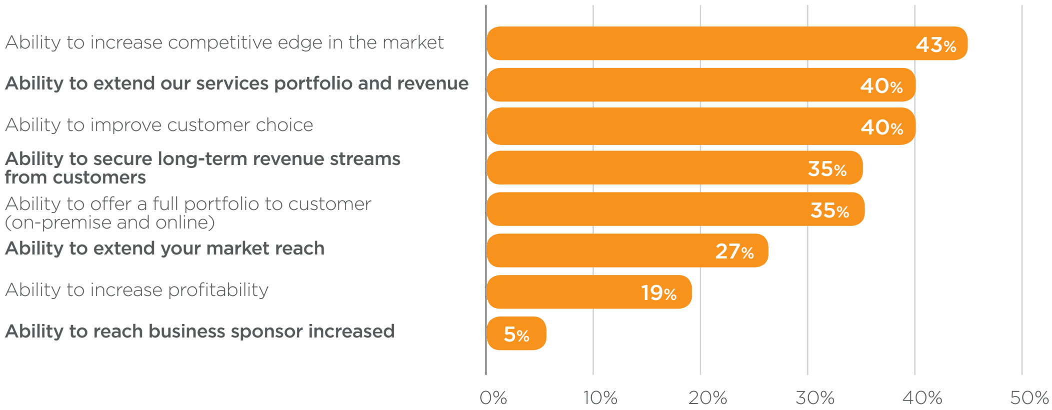
On which platforms does your organisation offer PaaS services?

	2016
Amazon Web Services (AWS)	47%
IBM	40%
Microsoft Azure	37%
Google	34%
VMware	31%
Amazon Elastic Compute Cloud (EC2)	27%
Office365	23%
Engine Yard	19%
Salesforce	16%
AppFog	10%
RedHat - OpenShift	10%
Our own platforms	10%

2. Benefits and challenges for the channel

The vast majority (98%) of organisations selling Cloud services report having seen tangible benefits of some kind, the most common being improved competitive edge in the market (selected by 43% of respondents), extended revenues (40%) and the ability to offer more choice for customers (40%).

Which of the following have been the biggest tangible benefits of Cloud services for your organisation? (2016)



The tangible benefits achieved no doubt contribute to the channel's growing commitment to Cloud. Eight in ten (79%) now actively promote Cloud services as alternatives to on-premise solutions, something that will help Cloud revenues to almost double by 2018.

However, it is important to note that much of the channel will remain dependent on traditional streams of revenue generation for some time to come. As revenue streams transition from CapEx to OpEx, there is still a belief and reliance on traditional on-premise alternatives.

While Cloud revenues will rise, the speed at which they do so depends heavily on partners' abilities to overcome their Cloud challenges – of which there are many – and the level of support that they receive from their vendors throughout the sales cycle.

Respondents reported a wide range of barriers and challenges that they have had to overcome in order to sell Cloud services, ranging from the impact of Cloud on commission structures and cash flow, through to brand reputation and staff skills. Looking at the most common issues encountered: 82% of respondents believe the change of culture within the organisation required to sell Cloud services to be a challenge; 81% have faced staff skills shortages, and 80% have come up against difficulties surrounding their Cloud marketing messages.

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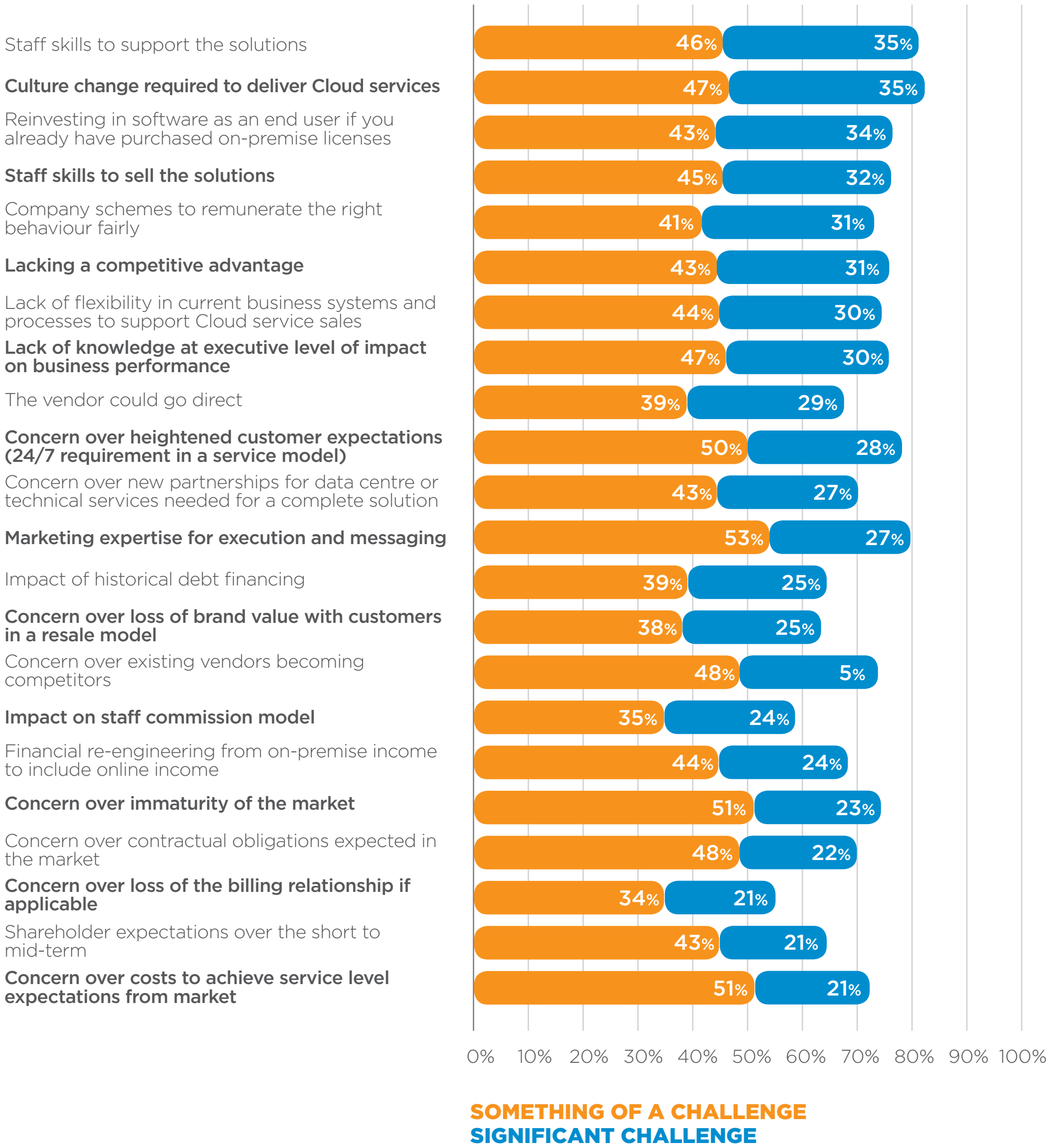
What are the biggest challenges to selling and delivering Cloud services your organisation has had to or have overcome?



Cloud services represent a significant departure from more traditional IT delivery models and requires a fundamental review of the impact upon an organisation's infrastructure, processes, skills, contracts, training, customer relationships, compensation schemes, changing landscape of competitors, as well as the very real risks associated with changing the basis of earning revenue and generating cash flow. This is a radical change for many and it is essential to understand the wider business impact in order to proactively attempt to mitigate any negative risk during the transition.

Of course, for most, this is not a wholesale overnight change but a gradual one, and there is the temptation to stick to the familiar way of doing business rather than embrace the opportunity for change. However, for the majority, the recognition of the need to evolve their business to selling Cloud services is apparent.

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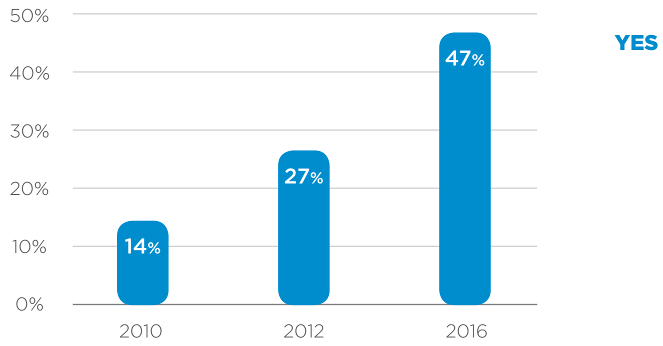
Of those not yet offering Cloud services, 47% believe it to be a threat to their organisation's current business model, up from 27% in 2012 and just 14% in 2010, yet still have not adapted to this recognition.

In terms of the reasons why, two-thirds view Cloud as a threat because their staff lack the skills needed to sell and support the solutions (68%), while a similar proportion see themselves as unable to implement the changes in culture needed to move to the Cloud model. These issues are not trivial ones and, indeed, are challenges that the whole of the channel community has to overcome if it is to be successful.

Two-thirds view Cloud as a threat because their staff lack the skills needed to sell and support the solutions (68%)

Do you see Cloud-based services as a threat to your organisation's current business model?



Why do you see Cloud-based services as a threat to your organisation's business model?

	2016
Lack of staff skills to sell & support the solutions	68%
Change of culture required within the organisation to deliver Cloud services	68%
Concern over existing vendors becoming competitors	32%
Concern over heightened customer expectations 24/7 in a service model	24%
Financial re-engineering from on-premise income to include online income	16%
Lack of knowledge at an executive level of the impact upon the business performance	16%
Concern over costs to achieve service level expectations from market	12%
Concern over loss of brand value with customers in a resale model	12%
Lack of flexibility in current business systems & processes to support Cloud service sales	12%
Concern over immaturity of the market	12%
Impact of historical debt financing	8%
Concern over new partnerships for data centre or technical services that may need to be forged to deliver a complete solution	8%

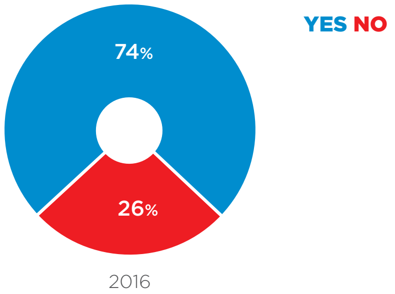
3. The Cloud supply chain

Vendors have a critical role to play in helping their partners overcome some – though importantly not all – of their Cloud challenges and it is clear that they are, by and large, living up to their end of the bargain. Three quarters (77%) of respondents believe that their vendors' services provide them with a competitive advantage and a similar proportion (74%) feel that the vendors they are working with are doing enough to support their transition to Cloud.

However, when we look at the entire base of respondents to include those organisations not offering Cloud services, the percentage of vendors that are felt to be doing enough to support the channel's transition to Cloud drops significantly to 47%.

77% of respondents believe that their vendors' services provide them with a competitive advantage and a similar proportion (74%) feel that the vendors they are working with are doing enough to support their transition to Cloud

Are the vendors that your organisation works with or, wish to work with, doing enough to educate you and support your business in the transition to Cloud?



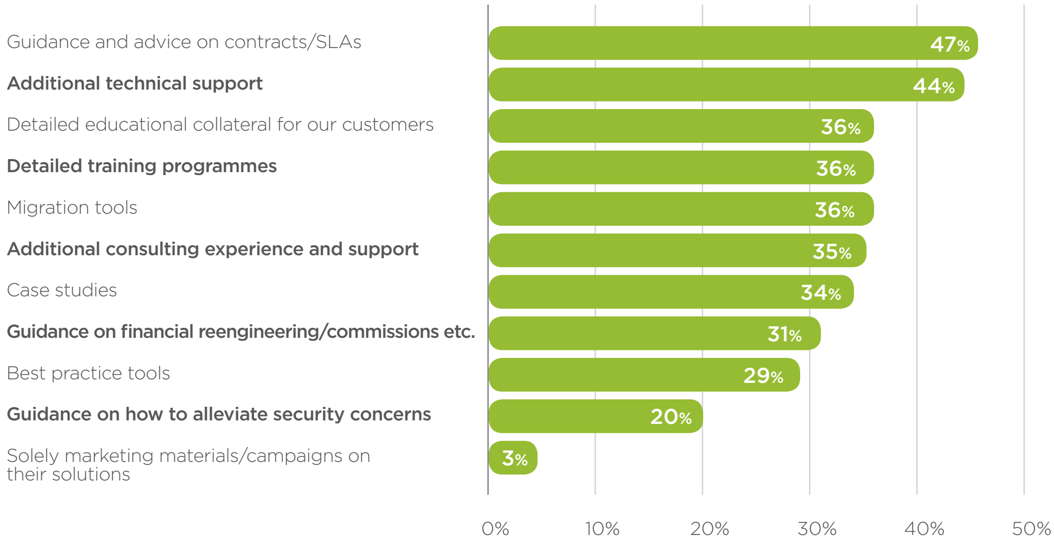
Looking at the areas that vendors are most likely to lend their assistance, half of respondents (50%) receive additional consulting experience, 46% receive educational collateral for customers and 45% receive guidance on contracting and SLAs.

There is, however, clearly some room for improvement. Guidance on contracts and SLAs tops the wish list here, selected by 47% of respondents, while 44% would like more technical support, and around a third would benefit from additional training.

Which of the following does your organisation's vendors provide to enable it to sell Cloud solutions?

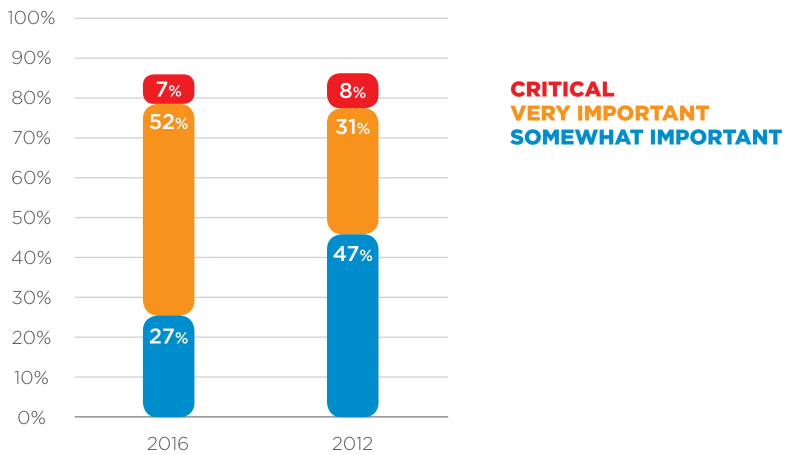
	2016
They provide additional consulting experience and support	50%
They provide detailed educational collateral for our customers	46%
They provide guidance and advice on contracts/SLAs	45%
They provide additional technical support	45%
They provide case studies	39%
They provide best practice tools	35%
They provide migration tools	32%
They provide detailed training programmes	29%
They provide guidance on financial reengineering/commissions etc.	21%
They provide guidance on how to alleviate security concerns	13%
They provide solely marketing materials/campaigns on their solutions	5%

Which of the following would your organisation like its vendors to provide to enable it to sell Cloud solutions? (2016)



A key issue, and one that is growing in importance, in deciding which Cloud solutions an IT channel organisation offers relates to the ability to white-label services. While the proportion deeming white-labelling important has remained the same since the last time this research was conducted, there are more respondents that see it as either critical or very important than there were four years ago.

How important a factor are white-labelled services to your organisation in deciding whose Cloud services to resell?

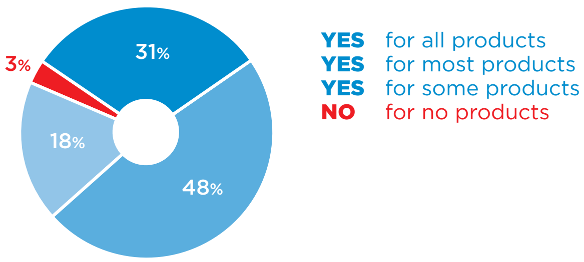


Many in the channel have spent years (if not decades) cultivating their own brands and in full control of the customer relationship and the service their customers receive

This should come as little surprise. Many in the channel have spent years (if not decades) cultivating their own brands and in full control of the customer relationship and the service their customers receive; parts of the business that they are naturally keen to protect. White-labelled Cloud services enable channel organisations to maintain control and establish themselves as bona fide Cloud Service Providers (CSPs).

However, it is critical that such white-labelling arrangements are matched by a commitment to transparency in the supply chain and it is clear from this research that that transparency is lacking in many cases. Just a third (31%) of organisations proactively inform their customers about the third parties involved in the delivery of all of their services, with the remainder offering only a partial view or, in 3% of cases, no view at all.

When selling Cloud services, does your organisation proactively notify prospects/customers if it is dependent on third parties in the supply chain to deliver service to the end user?

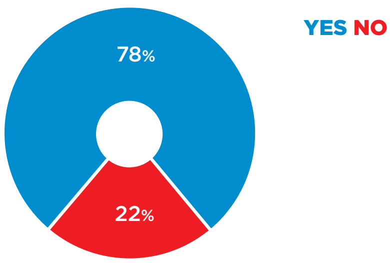


Total 2016

Complexity in the Cloud supply chain must also be managed transparently via back-to-back agreements so that there is no disconnect between the parties as to what is contracted, who is liable for elements of service delivery and who is accountable in the event of a service interruption. However, while the majority have these contractual agreements in place, they are conspicuously absent in one in five cases (22%).

CSPs should be fully transparent about the services they are offering to the market. This is a core tenet of the Cloud Industry Forum's Code of Practice for Cloud Service Providers

Does your organisation ensure contractual terms are back to back and compliance monitored where it relies on third parties to deliver Cloud services?



2016

Ultimately, for the Cloud to be seen as a secure and trustworthy alternative to on-premise infrastructure, CSPs should be fully transparent about the services they are offering to the market. This is a core tenet of the Cloud Industry Forum's Code of Practice for Cloud Service Providers.

Today, CIF continues to operate the only certified Code of Practice for Cloud Service Providers, and this has now been formally recognised by the European Union Agency for Network and Information Security (ENISA). The Code of Practice exists as an independent benchmark of best practice and key credentials that credible CSPs should be able to measure up to and be able to provide sufficient assurance about their transparency, capability and accountability of their offering to the market.

4. Alignment between the channel and end users

The channel's success with Cloud is closely tied to how well-aligned it is with the end user community, which is critical if it is to sell effectively and proactively address the barriers (perceived or otherwise) to Cloud adoption. Here we compare the channel's perceptions of the Cloud's benefits and potential drawbacks with those identified by businesses in our latest end user-focused research project.

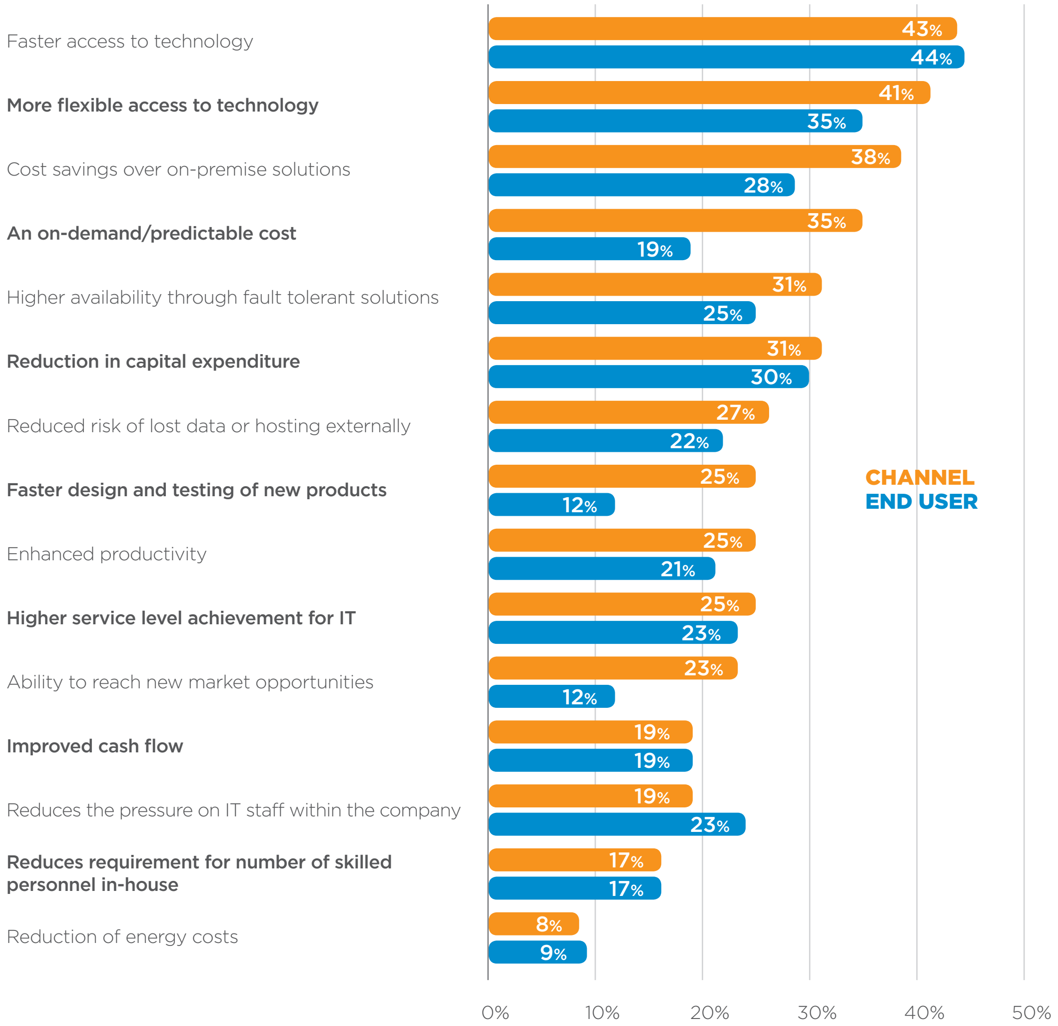
4.1 Benefits

The channel's perception of the benefits of Cloud for end users has shown a considerable shift since 2012, today focusing more on how it can transform the ways in which businesses operate and less on the bottom line. We have witnessed a similar shift in the end user community in recent years so such a change is encouraging.

However, the channel is still somewhat more likely to focus on costs (cost savings over on-premise solutions and predictable costs) than are end users. Although this issue is not a fundamental one, as the channel appears to be largely in sync with end users, there is a risk that the channel will place too great an emphasis on costs in their go to market messaging – at the expense of the broader transformative benefits of Cloud.

> The channel is still somewhat more likely to focus on costs (cost savings over on-premise solutions and predictable costs) than are end users

Which of the following have a tangible claim for the benefits to the customer of Cloud service adoption?



4.2 Inhibitors

The channel is largely in line with its target market when it comes to understanding end user concerns about Cloud. Data privacy and data security top the bill here, followed by concerns about the cost of change/migration, data recovery and data sovereignty.

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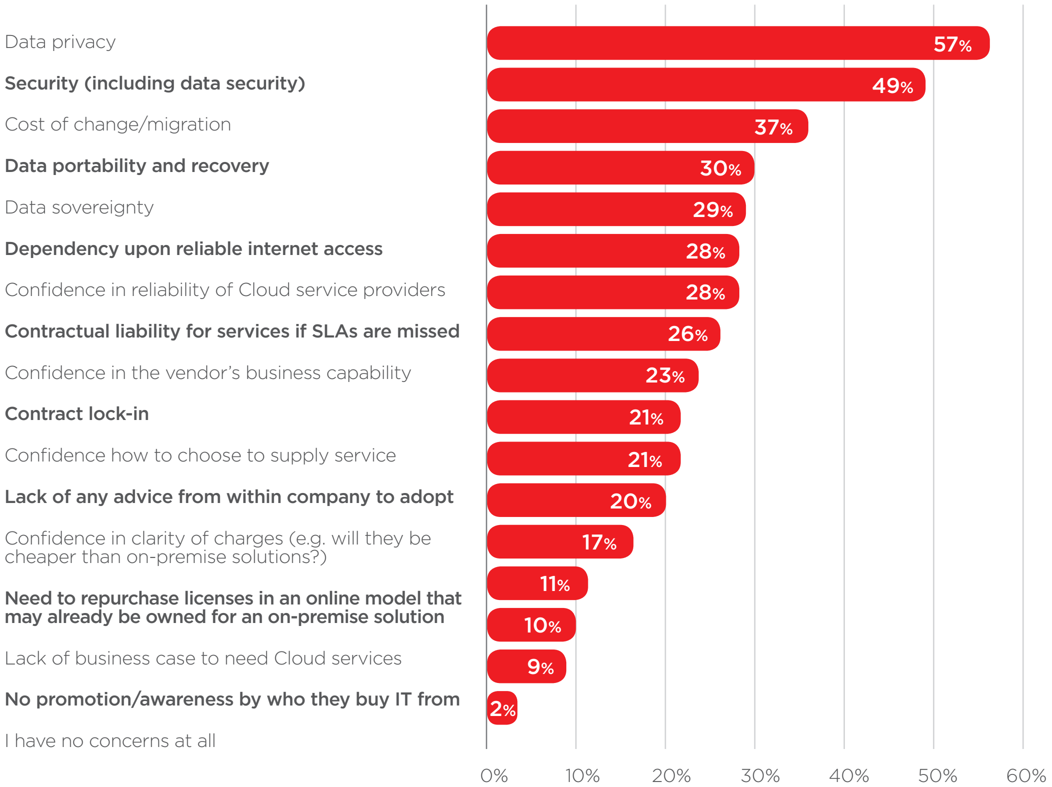
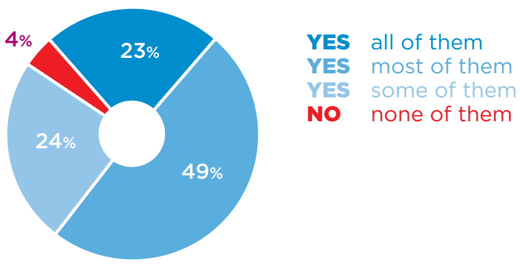
What are the most significant concerns, if any, that you have about the impact of Cloud service adoption by end users? (2016)



While the majority of respondents feel that they are able to proactively address these concerns with end users to some extent, less than a quarter (23%) feel confident that they can counter all of them. Many, it seems, are not as confident as they could or should be when it comes to selling Cloud.

Does your organisation have the skills to address these concerns proactively with end users?



5. Channel partner selection process

The extent to which channel organisations are successful in the Cloud depends on how closely their vendor relationships match up to their requirements. Partners need to choose vendor partner programmes that suit how they do business – and not the other way around.

To assist with the selection process, the sponsors of this White Paper, Intermedia, have compiled a checklist of things that partners will need to consider when deciding which vendors to do business with. To access and download the checklist, visit: www.intermedia.co.uk/customer-lifecycle-support-checklist

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6. Conclusion

Our research clearly shows the UK channel recognises the relevance of Cloud and the opportunity it represents, yet there is still a need to further develop and integrate Cloud solutions and services in to their portfolio. Aside of financial considerations, internal skills and cultural changes are two of the bigger hurdles for the channel to overcome.

In line with the broader market, the technical flexibility, agility and cost predictability that Cloud can offer have been key to its attraction. However, it was not anticipated that over the last four years the proportion of the channel offering Cloud services would see no material increase. Those who have stepped up though are assuming much more strategic positions as Managed Service Providers in the supply chain, which is enabling them to deliver greater value to their customers.

There is a strong case to suggest that, rather than making the channel redundant, Cloud has augmented its role – particularly as customers seek migration support and implement hybrid IT environments which require continuous monitoring, support and maintenance. The channel is in the unique position in the Cloud supply chain to advise end users on the most appropriate infrastructures for different applications and aggregate disparate Cloud technologies.

End user organisations of every size and nature are adopting Cloud services at pace and there are a broad range of deployment and service models now available offering greater flexibility. The growth in PaaS clearly indicates this. A vibrant, educated and capable channel is therefore essential to vendors and customers alike to facilitate and fulfil demand in helping many of these organisations to achieve their Cloud plans.

It is clear that many in the channel have a number of barriers to overcome before they can safely claim their position in the Cloud supply chain. Selling transformative services are fundamentally different to selling products; redefining processes, SLAs, contractual terms, remuneration, sales skills, income, profitability and cash flow are just some of the challenges to be faced in securing that growth, and there is an increasing need for these companies to gain access to sound advice, experience and best practice.

If the channel is to overcome these challenges and capitalise on the opportunities posed by Cloud, vendors must assume a greater role in educating and supporting resellers throughout the entire sales cycle and tailoring their approach on a partner-by-partner basis. At the same time, channel organisations intent on going down the Cloud route will need to educate themselves about the potential pitfalls of Cloud with relevant training schemes and those elements they should look for in their relationships with vendors.

To support both customers and channel alike the Cloud Industry Forum has developed and launched its Cloud Adoption Roadmap© which gives a structured process to follow and an independent e-learning programme.

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Intermedia gives customers and partners the freedom to focus on business, not IT. We do so by integrating 30 essential Cloud IT apps with a single point of control – and backing it with levels of reliability, security and support that assure a Worry-Free Experience™.

Intermedia is a one-stop shop for Cloud business applications. Our Office in the Cloud™ suite integrates the essential IT services that businesses need to do business, including email, voice, file syncing and sharing, conferencing, instant messaging, identity and access management, mobility, security and archiving. Office in the Cloud goes beyond unified communications to encompass a wider breadth of fundamental IT services, delivered by a single provider.

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Intermedia serves over 70,000 businesses and has 6,000 active partners, including VARs, MSPs, telcos and cable companies. Our award-winning Partner Program lets partners sell under their own brand with full control over billing, pricing and every other element of their customer relationships. Intermedia is the world's largest independent provider of hosted Exchange.

Intermedia has over 700 employees worldwide who manage numerous datacenters to power our Office in the Cloud – and to deliver customers and partners our Worry-Free Experience™.

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The Cloud Industry Forum (CIF) was established in direct response to the evolving supply models for the delivery of software and IT services. Our aim is to provide much needed clarity for end users when assessing and selecting Cloud Service Providers based upon the clear, consistent and relevant provision of key information about the organisation/s, their capabilities and operational commitments.

We achieve this through a process of self-certification of vendors to a Cloud Service Provider Code of Practice requiring executive commitment and operational actions to ensure the provision of critical information through the contracting process. This Code of Practice, and the use of the related Certification Mark on participant's websites, is intended to provide comfort and promote trust to businesses and individuals wishing to leverage the commercial, financial and agile operations capabilities that the Cloud-based and hosted solutions can cover.

CLOUD INDUSTRY FORUM®

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