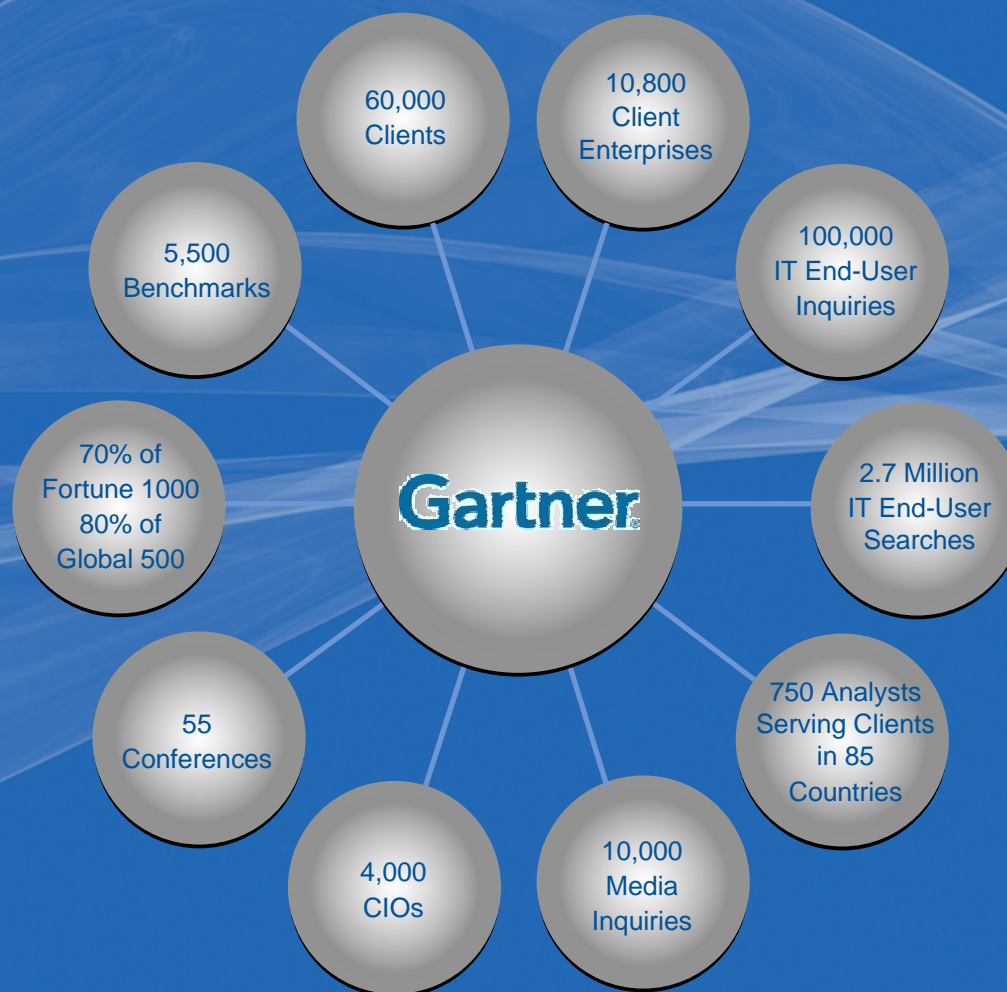


Welcome!

Thank you for joining us on today's Gartner webinar.



Osservatorio SaaS/Cloud e OSS 2011: Trend di adozione

Webinar 28 Febbraio 2011

Bianca F. Granetto

Research Director

Enterprise Applications Software

Gartner

This presentation, including any supporting materials, is owned by Gartner, Inc. and/or its affiliates and is for the sole use of the intended Gartner audience or other authorized recipients. This presentation may contain information that is confidential, proprietary or otherwise legally protected, and it may not be further copied, distributed or publicly displayed without the express written permission of Gartner, Inc. or its affiliates.
© 2010 Gartner, Inc. and/or its affiliates. All rights reserved.

Gartner[®]

Key Issues

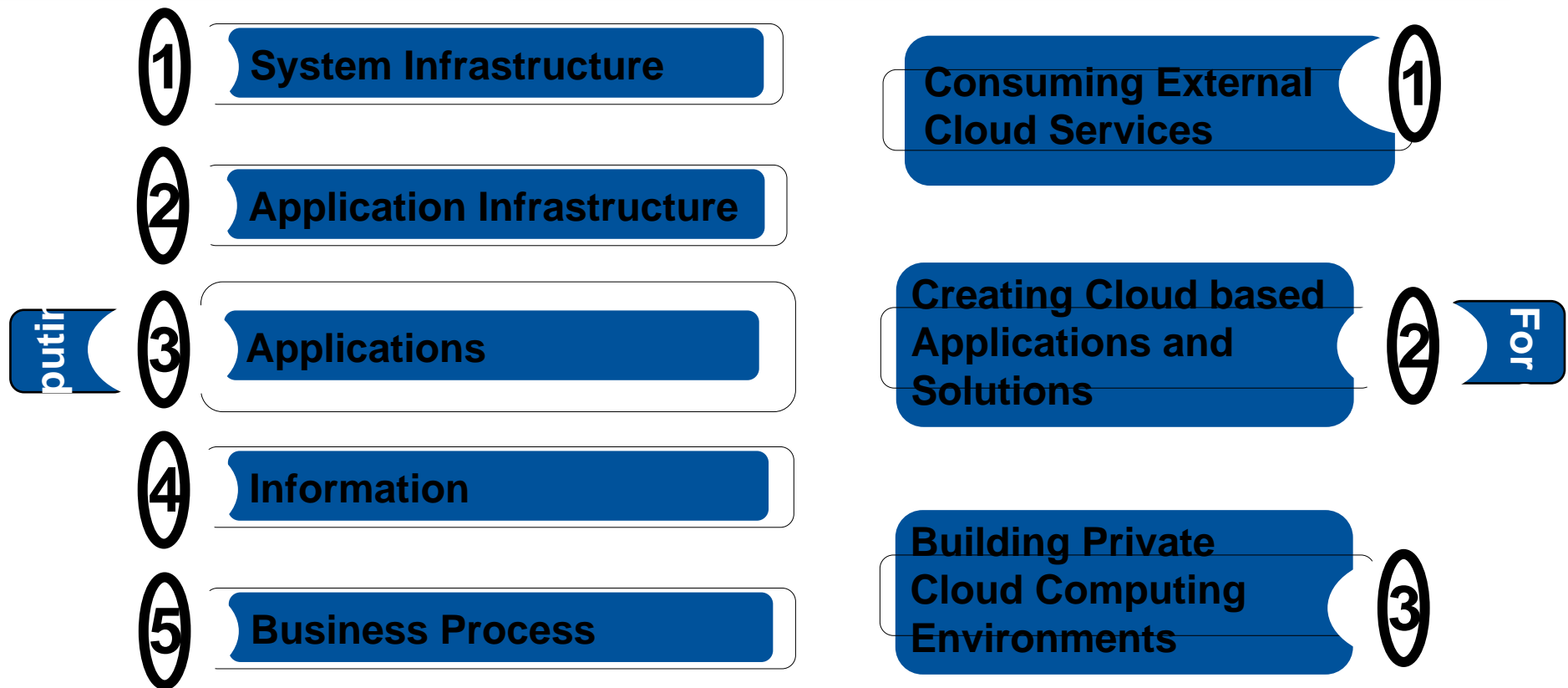
- Qual è la situazione e quali i principali trend di adozione di soluzioni SaaS/Cloud?
- Qual è la situazione e quali i principali trend di adozione di soluzioni OSS?
- Quando è opportuno adottare un nuovo modello di delivery quale SaaS/Cloud o OSS?

Definizione di SaaS

- Software as a service (SaaS) —
Also known as "on demand":
 - An application owned, delivered and managed remotely by one or more providers
 - Where the provider delivers an application based on a single set of common code and data definitions, which are consumed in a one-to-many model by all contracted customers at any time
 - On a pay-for-use basis or as a subscription based on use metrics

Definizione di Cloud Computing

Gartner defines cloud computing as *"a style of computing where scalable and elastic IT-related capabilities are provided 'as a service' to external customers* using Internet technologies."*



* Private cloud computing exists when cloud services are delivered to internal customers

Principali trend osservati nel corso del 2010

- Growing communities of professional services organizations are supporting SaaS implementations, integration initiatives, process engineering, and change management. Cresce l'offerta
- An increasing number of enterprises are using a variety of SaaS applications from multiple vendors sourced without participation from IT, creating management challenges. Nuovi Buyer?
- Deployments are growing larger, with more large enterprise deals in the thousands or tens-of-thousands of subscriptions. Crescono le dimensioni dei progetti
- Deal structures are slowly becoming a more pay-for-use model, especially in emerging regions. Paesi emergenti
- Social software and social media are becoming increasingly integrated with SaaS solutions as companies use them for sales, service and marketing initiatives; but social software is still among the least-used SaaS solution. Social

Stime di mercato e Previsioni di crescita del fatturato SaaS (Enterprise Application Software)

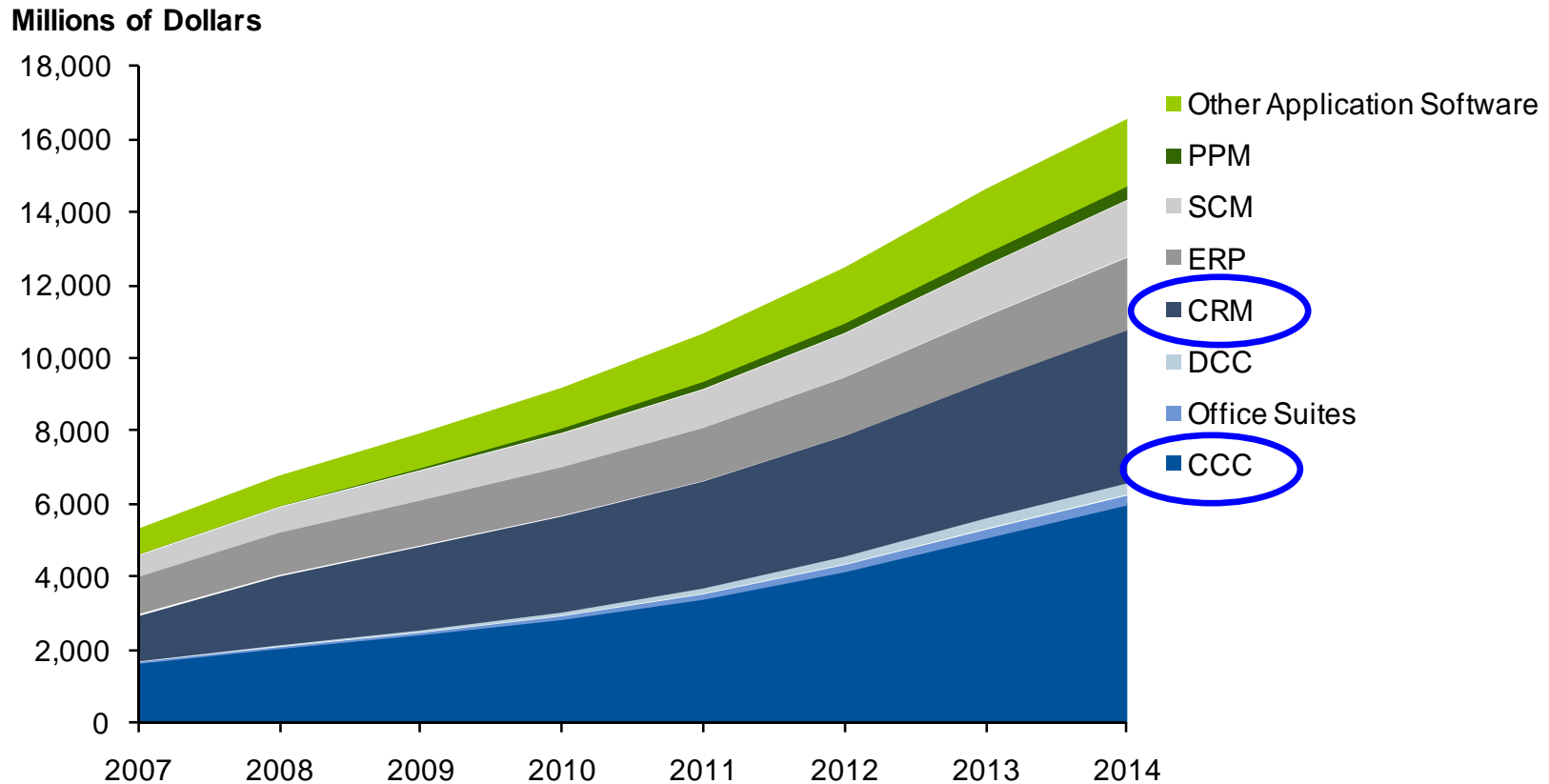
Total SaaS Software Revenue by Enterprise Application Market, 2007-2014 (Millions of Dollars)

	2007	2008	2009	2010	2011	2012	2013	2014	CAGR (%) 2009-2014
Content, Communication and Collaboration	1,649	2,059	2,434	2,855	3,411	4,162	5,084	5,995	19.8%
Office Suites	51	56	68	101	149	197	247	270	31.7%
Digital Content Creation	18	44	65	97	149	215	287	309	36.7%
Customer Relationship Management	1,231	1,872	2,279	2,614	2,911	3,282	3,731	4,187	12.9%
Enterprise Resource Planning	1,044	1,177	1,248	1,341	1,461	1,610	1,800	2,005	10.0%
Supply Chain Management	582	690	807	912	1,041	1,187	1,364	1,535	13.7%
Project and Portfolio Management	22	30	70	136	211	274	331	385	41.0%
Other Application Software	714	842	964	1,121	1,328	1,542	1,780	1,853	14.0%
Total Enterprise Software	5,312	6,769	7,935	9,178	10,662	12,469	14,624	16,540	15.8%

Source: Gartner (November 2010)

Content, Communication and Collaboration e CRM sono i mercati più grandi

Total Software Revenue Forecast for SaaS Delivery Within the Enterprise Application Software Markets, 2007-2014



Source: Gartner (November 2010)

Ricerca Gartner sui trend di adozione di soluzioni SaaS 2010:



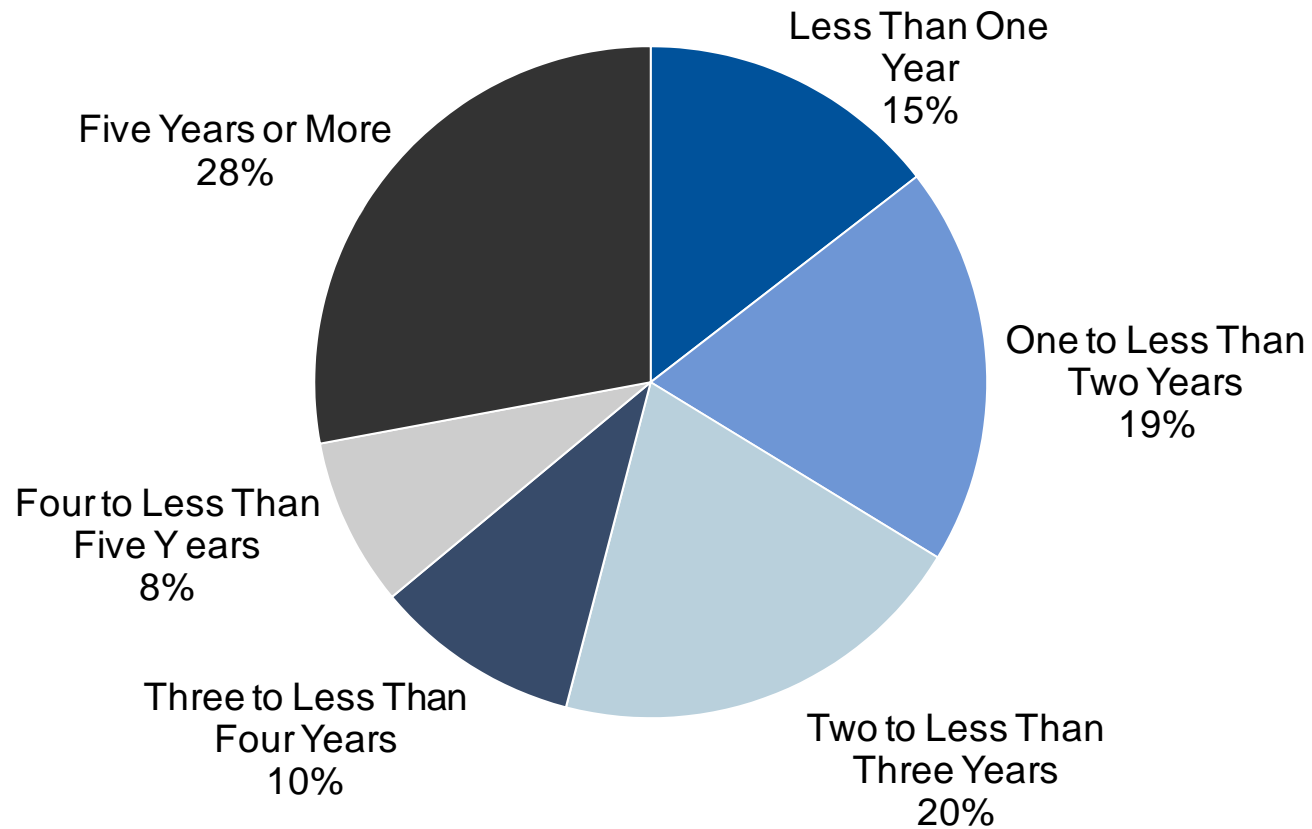
- Gartner conducted a survey across 9 countries worldwide (33% Western Europe) – 270 respondents either currently using or planning to use SaaS for enterprise applications within the next 12 months.
- Key Findings show growing intent to invest though critical issues remain:
 - Over 95% of organizations expect to maintain or grow their investments in SaaS, and more than one-third have migration projects underway from on-premises to SaaS.
 - More than one-third cited issues with SaaS deployments – top challenges include integration issues and network instability.
 - Most companies still do not have policies governing the evaluation and use of SaaS — only 39% indicated that such a policy or process currently exists, up from 38% in 2008.

Gli aspetti negativi: integrazione e rete

Policies, governance?

Non più emergente...in crescita

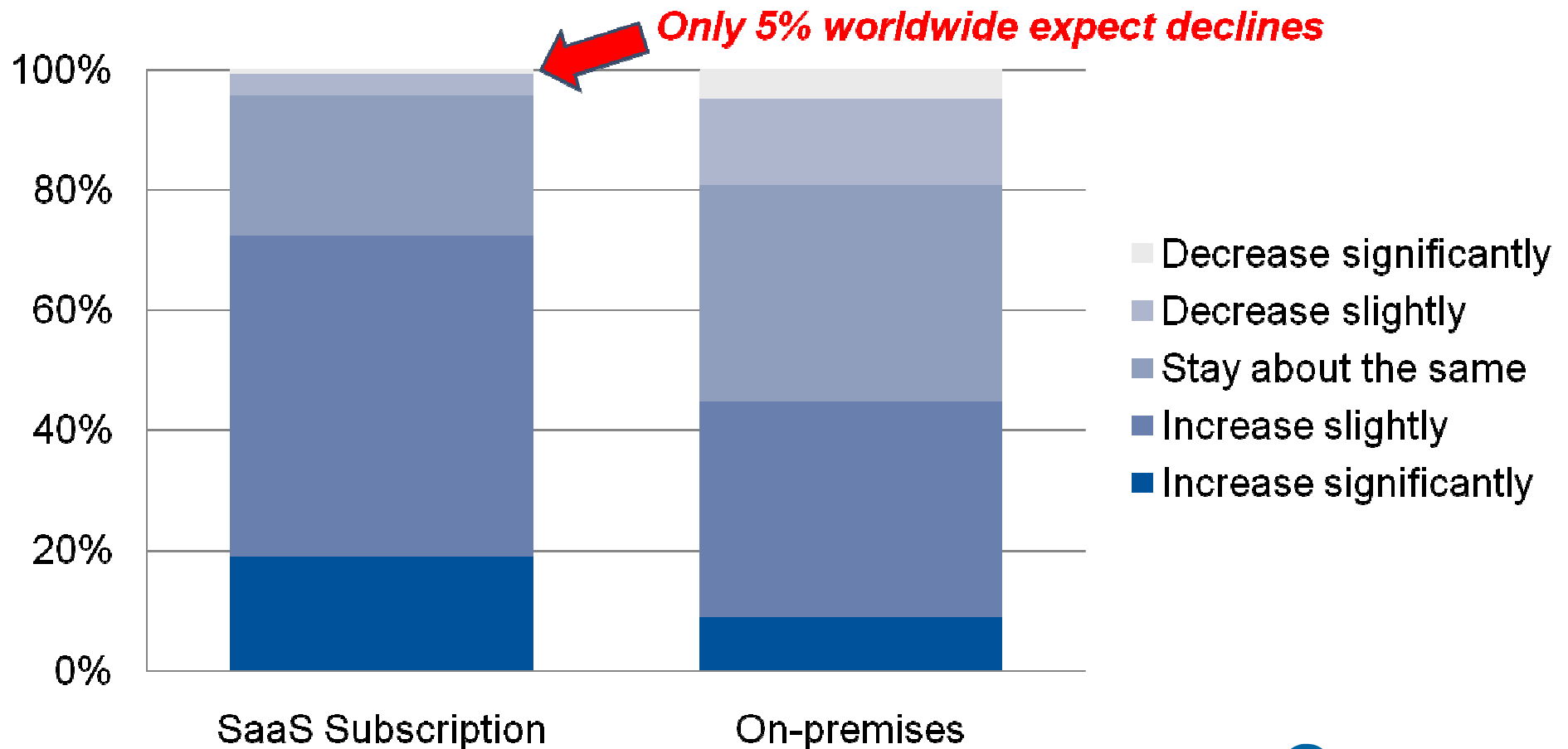
Survey question: How long has your organization been using SaaS?



N = 172

Crescite confermate nell'analisi

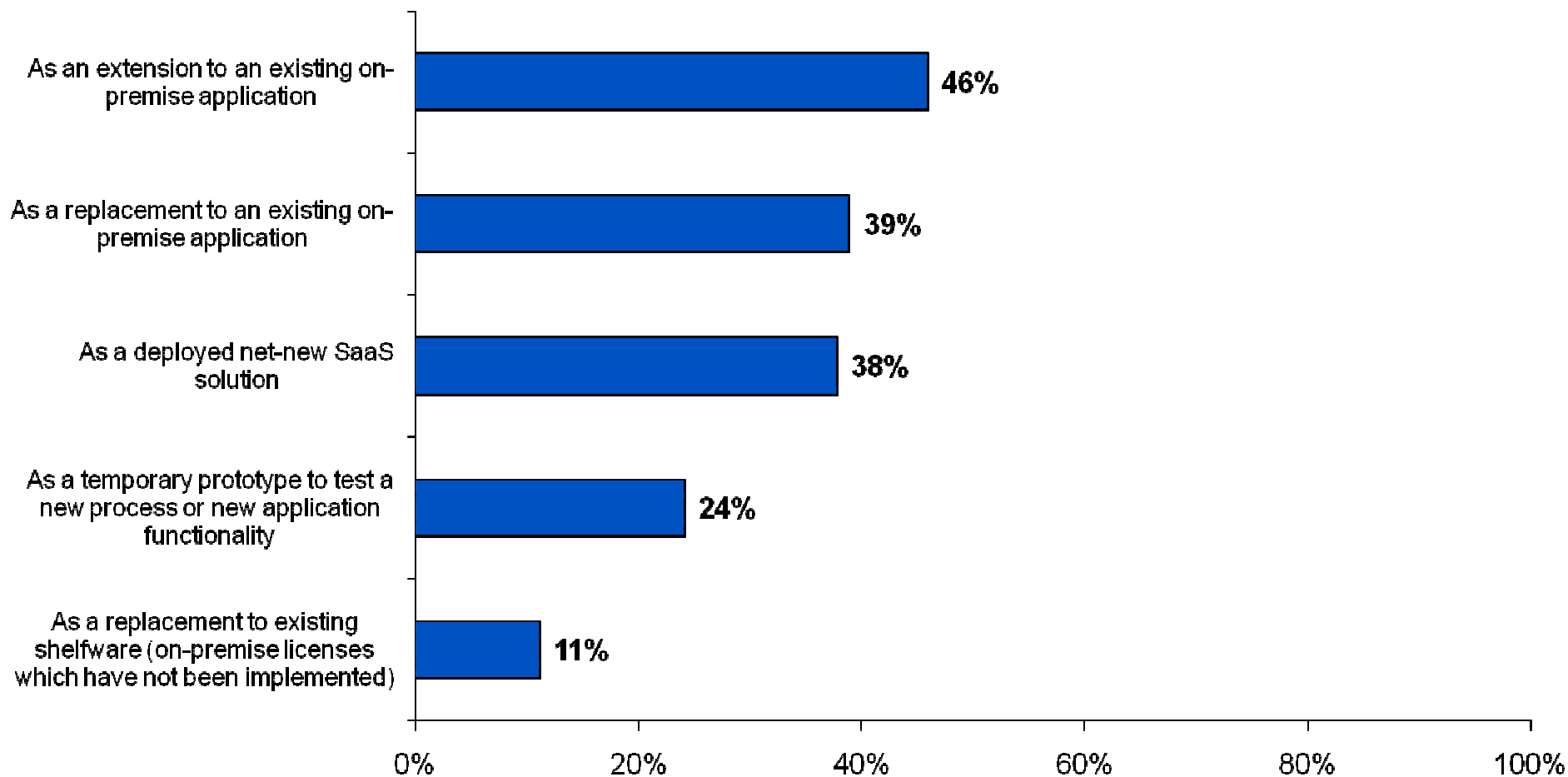
Survey question: Compared to today, do you expect your organization's new investments in on-premises and SaaS solutions, integration and consulting to decrease, stay the same or increase in two years ?



Numero rispondenti =270

I principali driver di adozione: vince l'innovazione ...

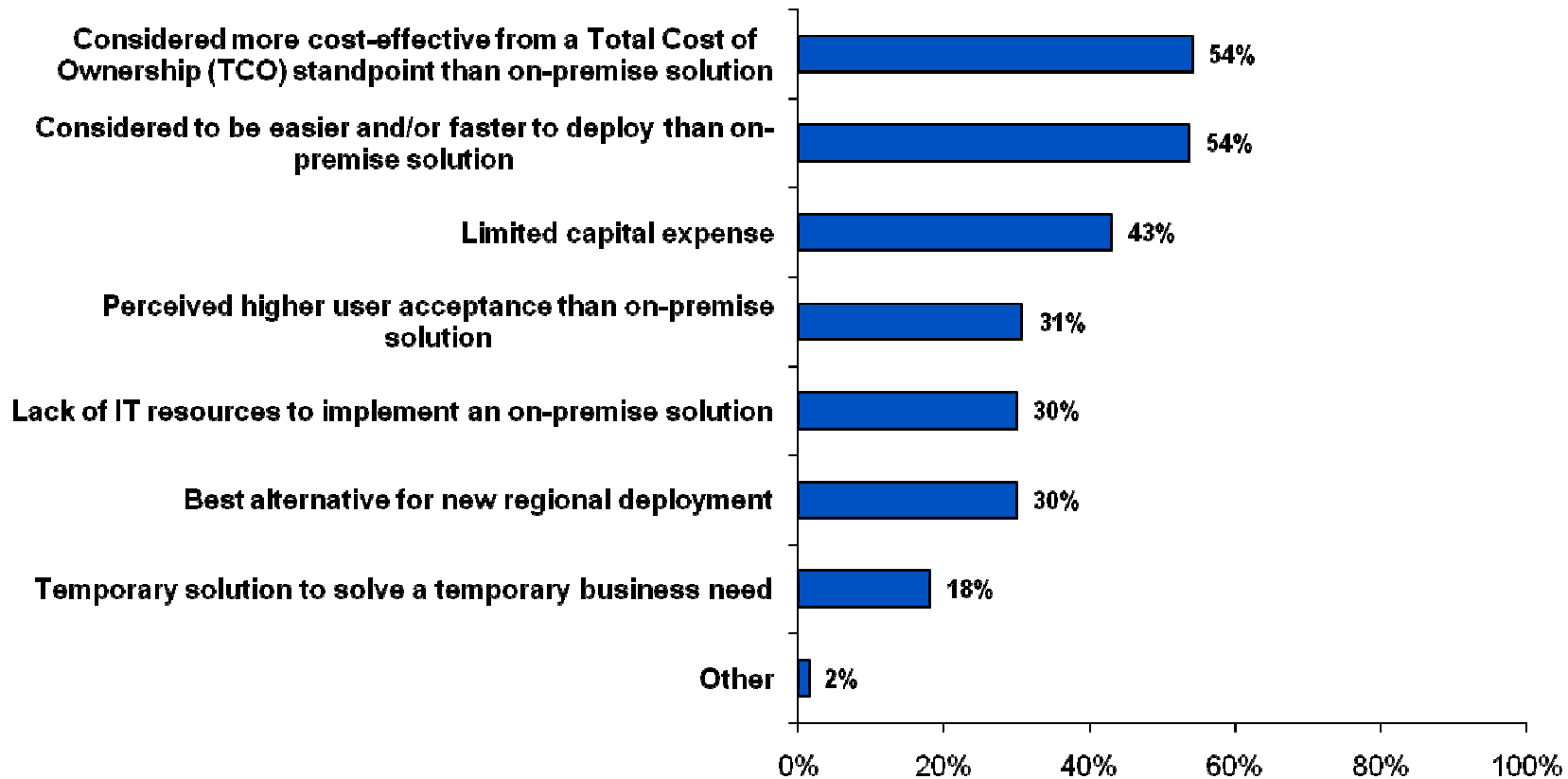
Survey question: How is your organization using its SaaS solution(s)/planning to use its SaaS solution(s) in the next 12 months?



Numero rispondenti =270

...e l'efficienza

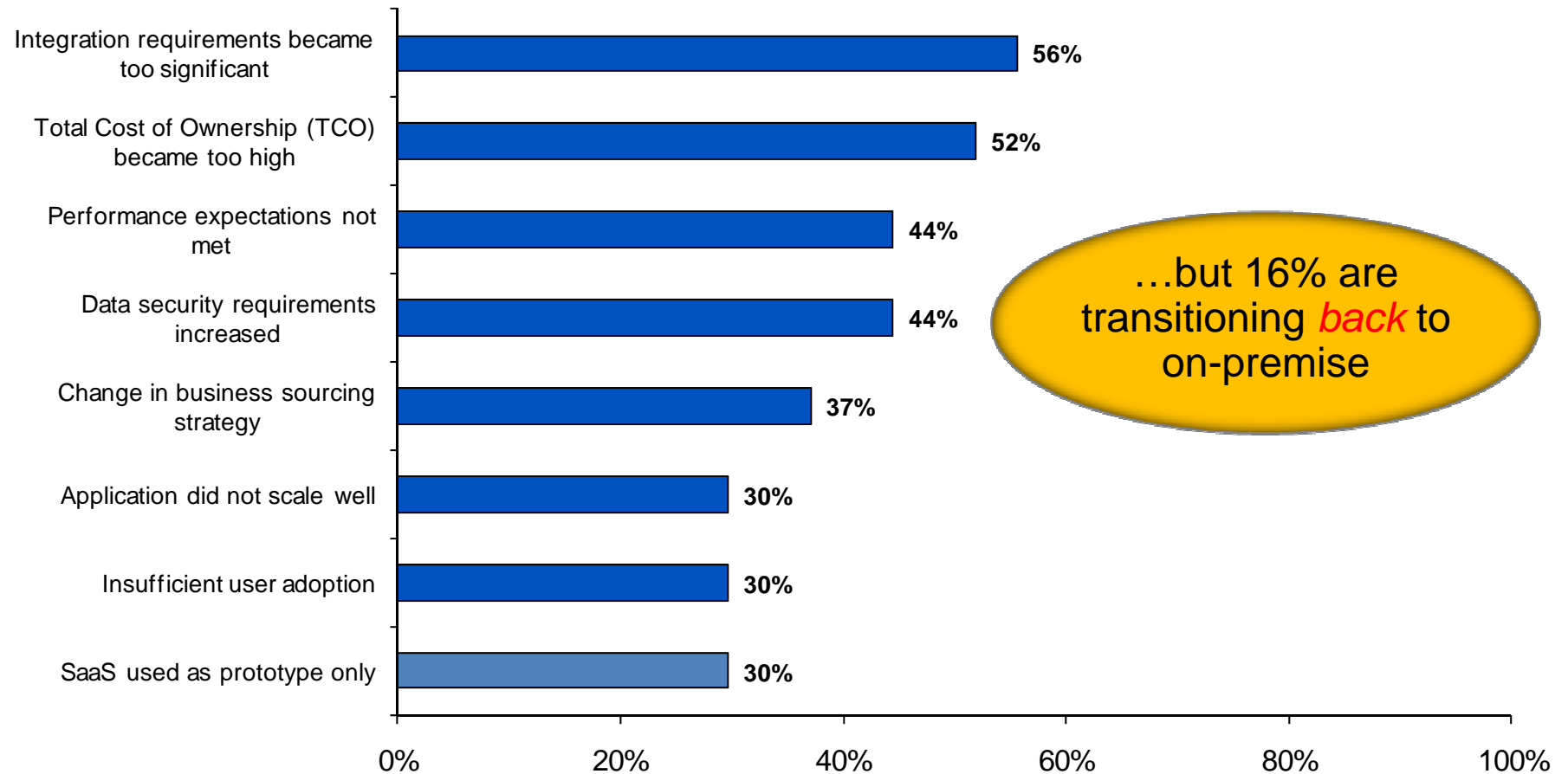
Survey question: Why is your organization currently using or planning to use SaaS in the next 12 months?



Numero rispondenti =270

I principali fattori inibitori

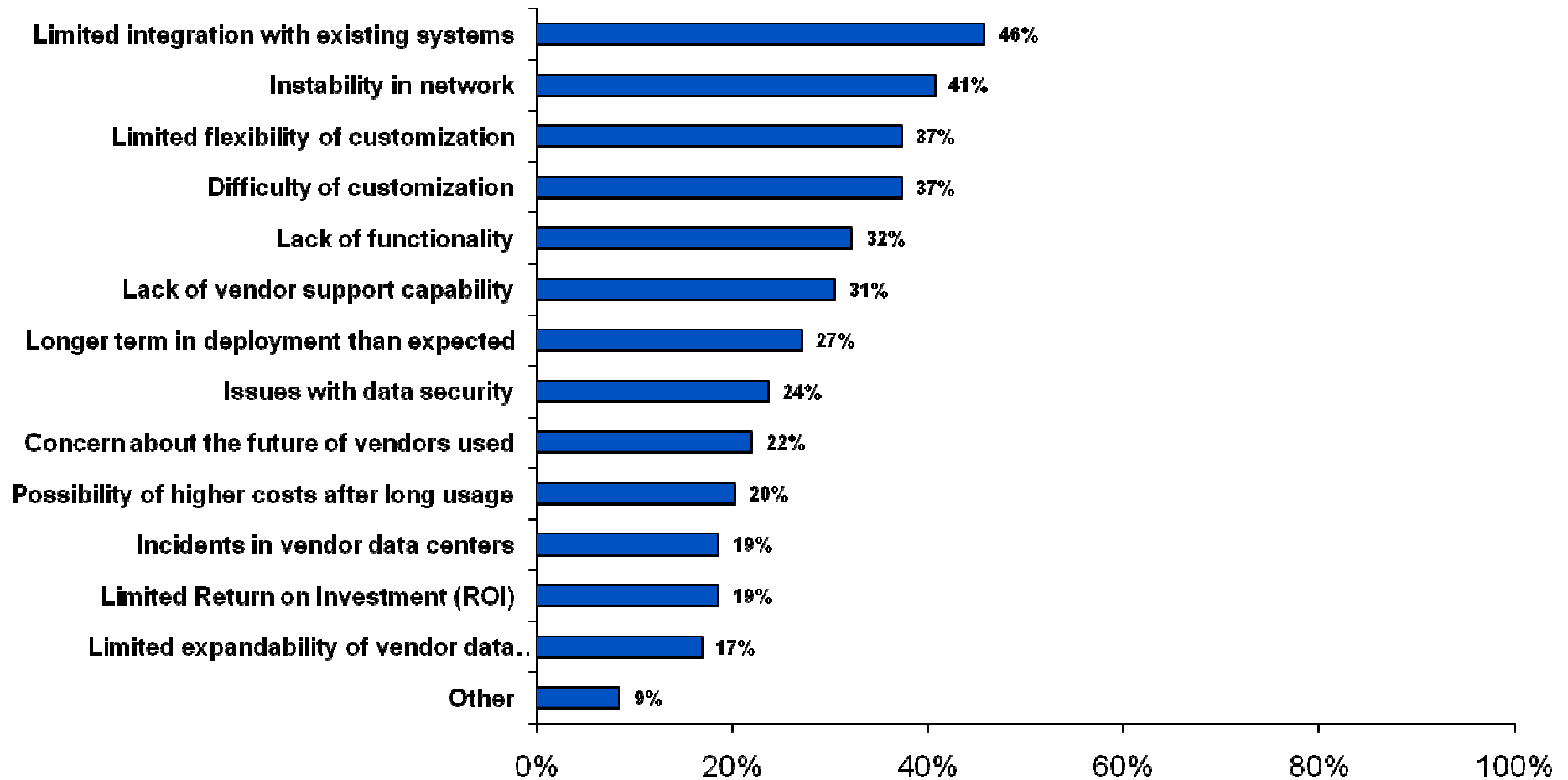
Survey question: Why is your organization currently transitioning from a SaaS solution to an on-premise solution?



Numero rispondenti =27

I principali fattori inibitori

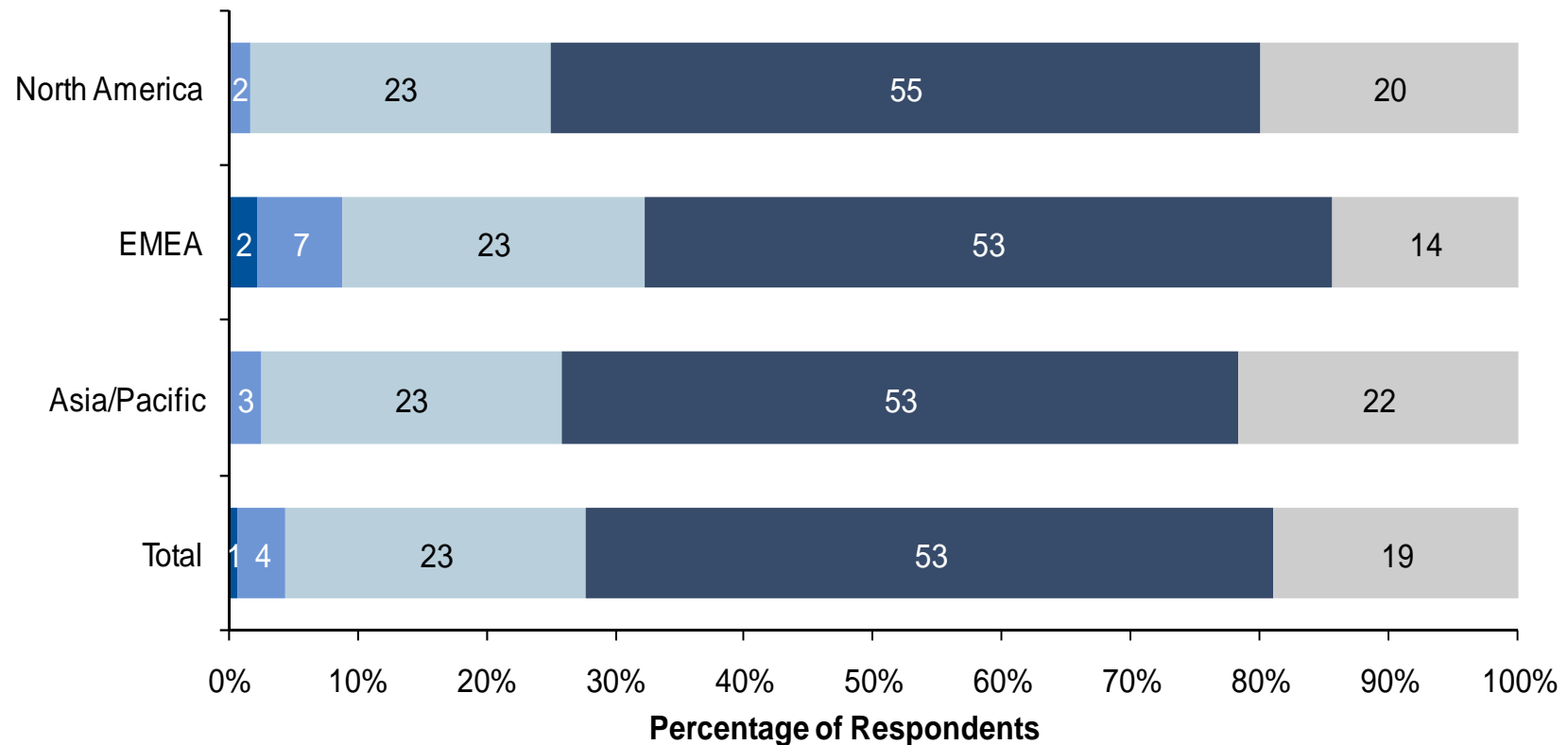
Survey Question: Which of the following issues did your organization experience during its most recent SaaS deployment?



Numero rispondenti =59

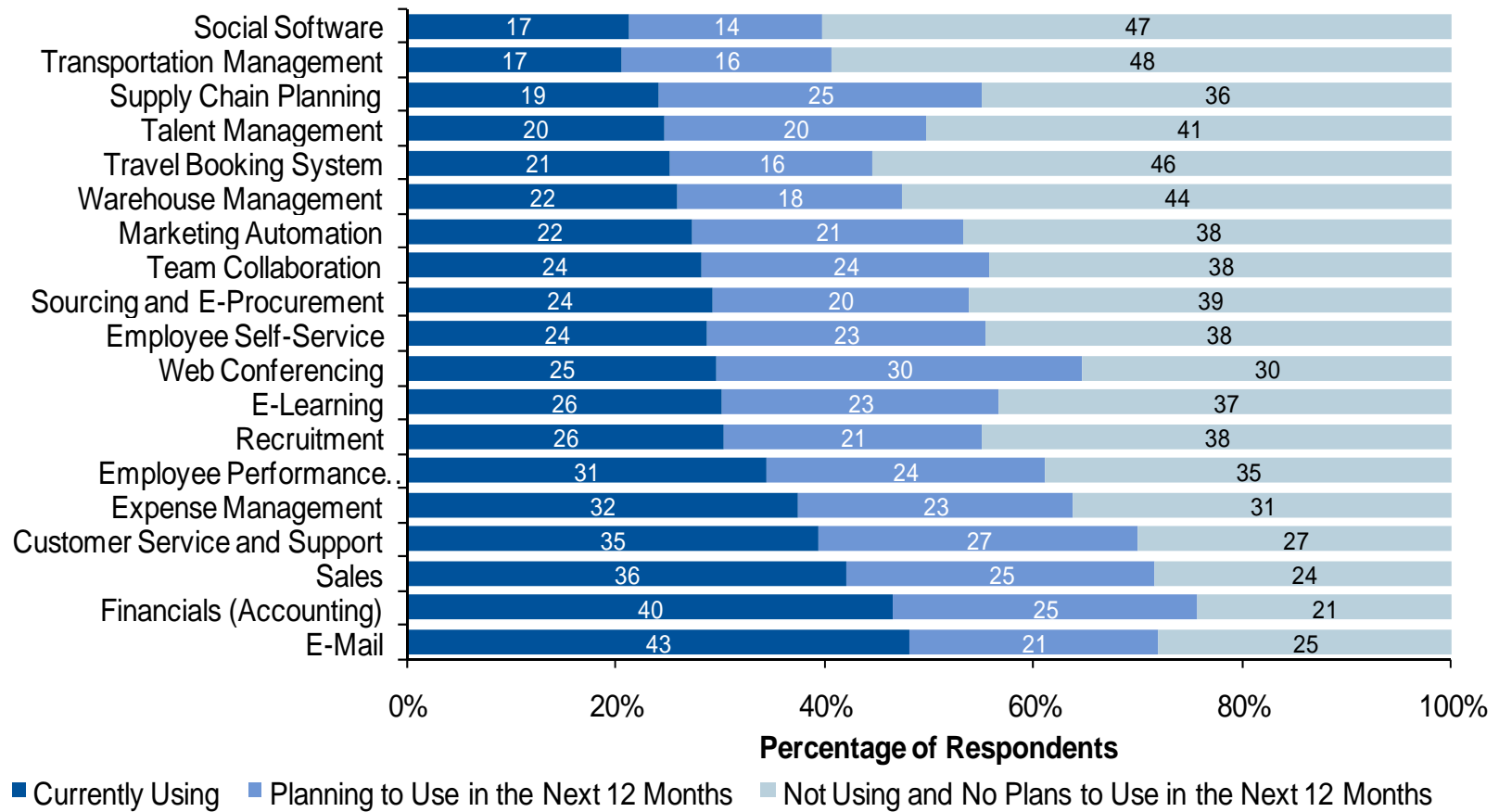
Trend di adozione per aree geografiche

Survey question: Compared to today, how do you expect your organization's new investments in SaaS solutions, integration and consulting to decrease, stay the same or increase in two years ?



■ Decrease Significantly ■ Decrease Slightly ■ Stay About the Same ■ Increase Slightly ■ Increase Significantly
N = 270

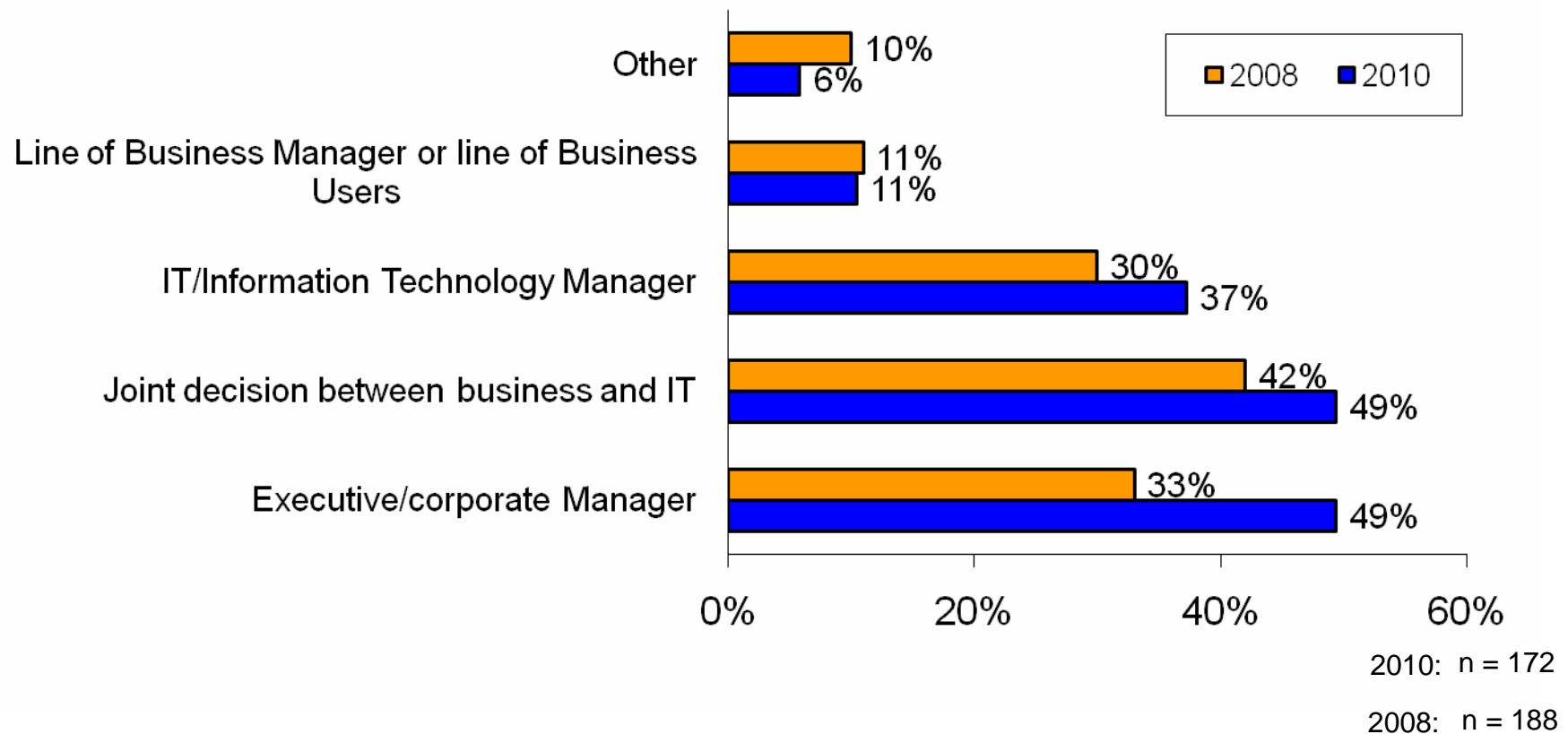
Trend: Le soluzioni più adottate



N = 270

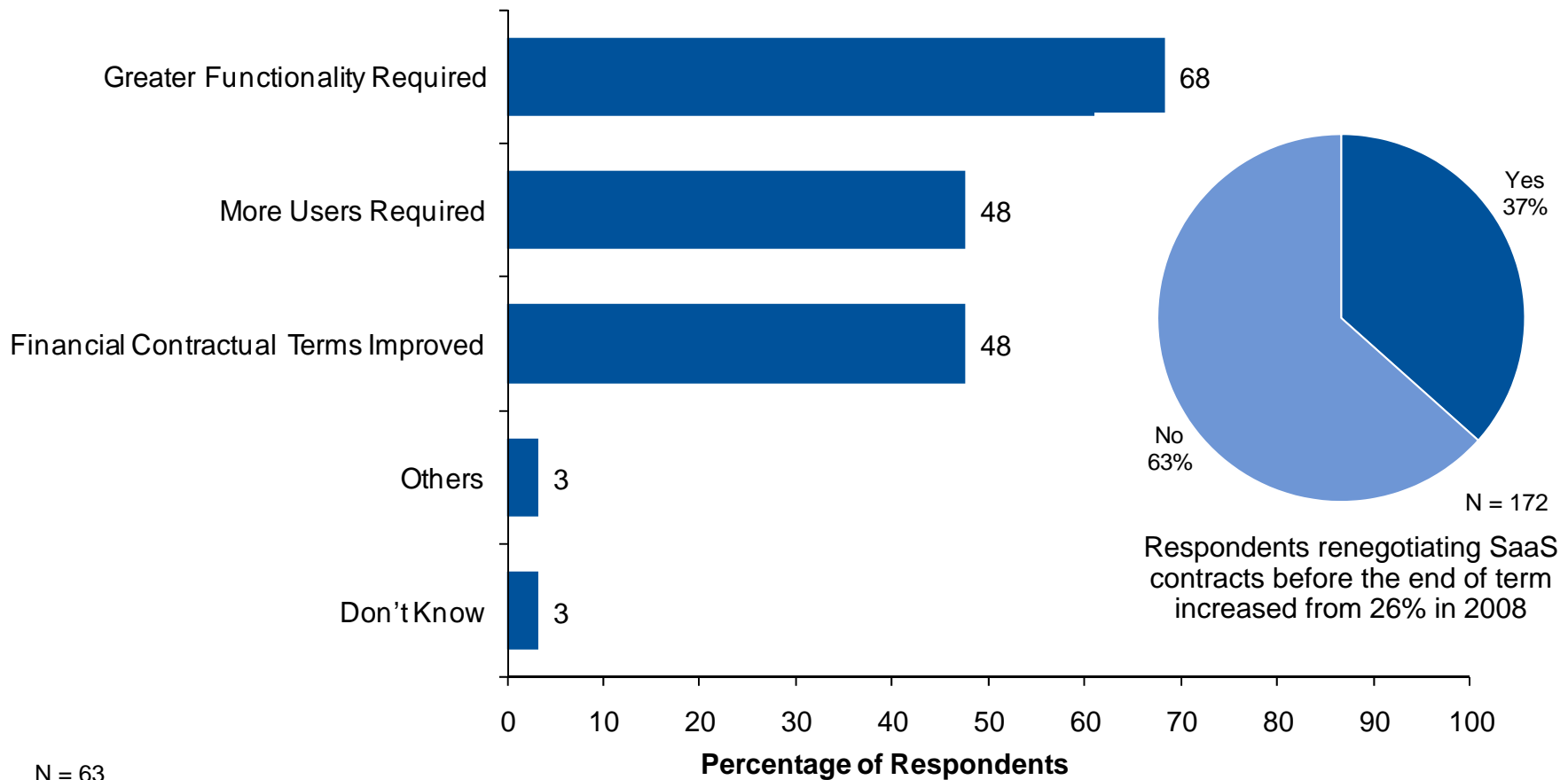
Trend: nuovi decisori

Survey question: Who makes the purchase decisions for SaaS within your organization?



Attenzione...lavori in corso d'opera...

Survey question: Why was (were) this (those) contract(s) renegotiated?



N = 63

Trend: specializzazione e disintermediazione...

- Breadth and depth of SaaS usage will evolve:
 - More vertical-specific solutions, often developed/hosted by partners
 - Enlarging partner ecosystems and solutions
 - Growing SI community; pursuing new business models; increasing channel opportunity
- More-experienced buyers are testing the limits
- Adoption will increase, but mixed application environments are likely to remain
- Traditional on-premises vendors will feel increasing pressure:
 - from buyers seeking to optimize costs and contractual terms
 - from SaaS competitors who are aggressively targeting businesses of all sizes
 - to optimize multiple business models if offering on-demand solutions
- Regional growth:
 - will continue selectively; not a good fit everywhere
 - offers opportunity but requires investment and time commitment



Adottare soluzioni SaaS richiede considerazioni più ampie per un giusto bilanciamento costi e benefici



- **Determine if SaaS is appropriate** and advantageous within your overall sourcing and applications strategy before committing to the model and selecting a service provider.
- **Evaluate the organizational and process changes required** for your SaaS solution - you must still focus on business processes, governance and people regardless of deployment model..
- **Anticipate the broader costs incurred with a SaaS solution** and when these will occur within the life cycle. Identify costs associated with subscription, training, customization, integration or feature upgrades and review contractual terms carefully to determine whether SaaS is the better choice.
- Mixed application environments will be the norm for the near term. **Focus skills on integration, contract management, and security** to avoid gaps in the architecture.

Qualche regola è necessaria anche in questo caso...

Business-IT Relationship

- Configuration change management ownership
- New release validation
- Technical integration
- Budgeting allocation
- System administration
- ...and more

Vendor Management

- Communication protocols
- Internal contract ownership
- Risk mitigation strategy for vendor going out of business
- ... and more



SaaS RFP Template

- Data center operations
- Architecture
- Security and privacy
- Disaster recovery capabilities
- ...and more

SaaS Contract Requirements

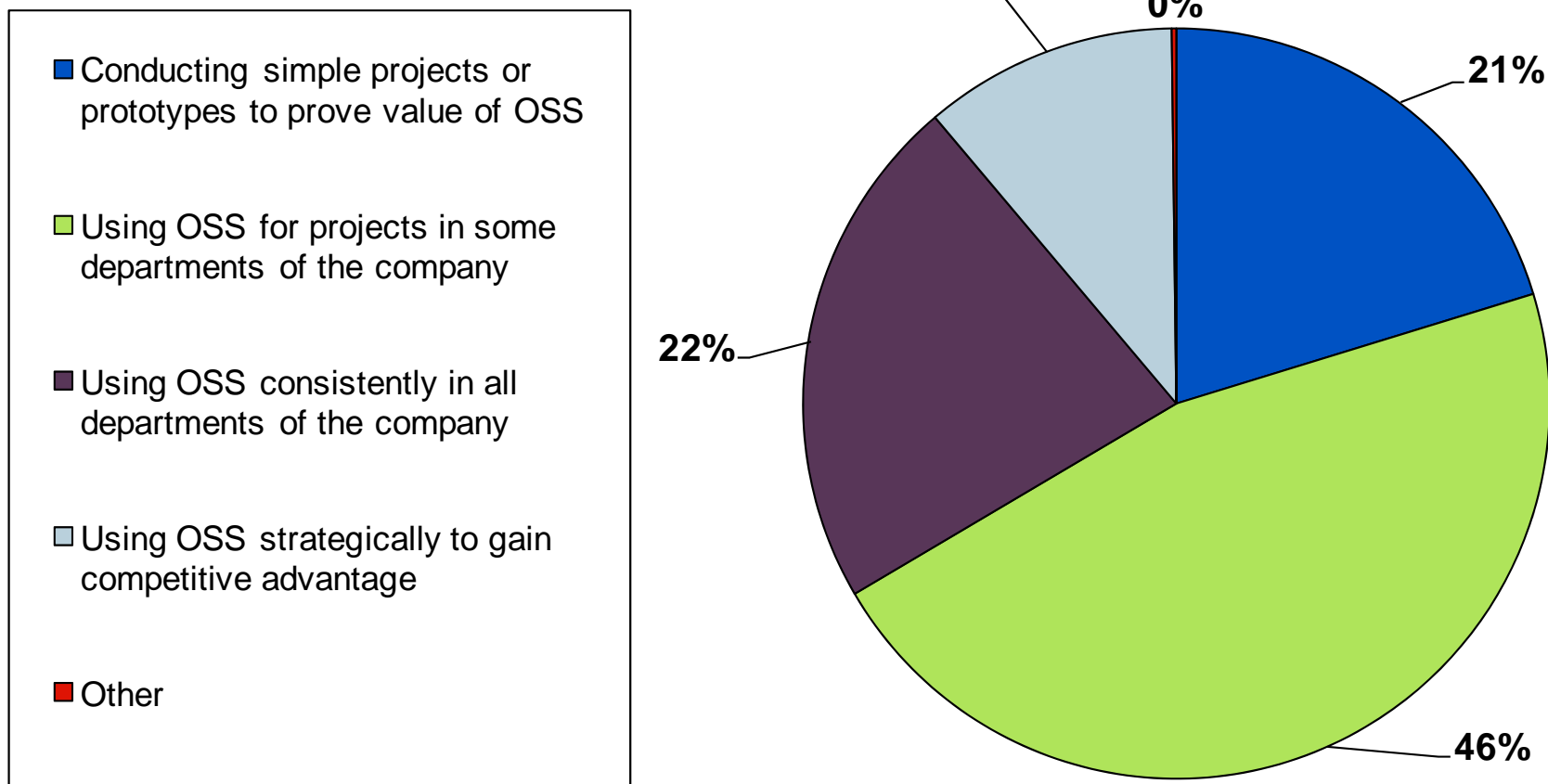
- Uptime and reliability clauses
- Data ownership provisions
- Security and privacy assurances
- Disaster recovery guarantees
- Renewal price caps
- ... and more

Less than 40% of buyers have a governance policy

OSS Market Overview & Findings

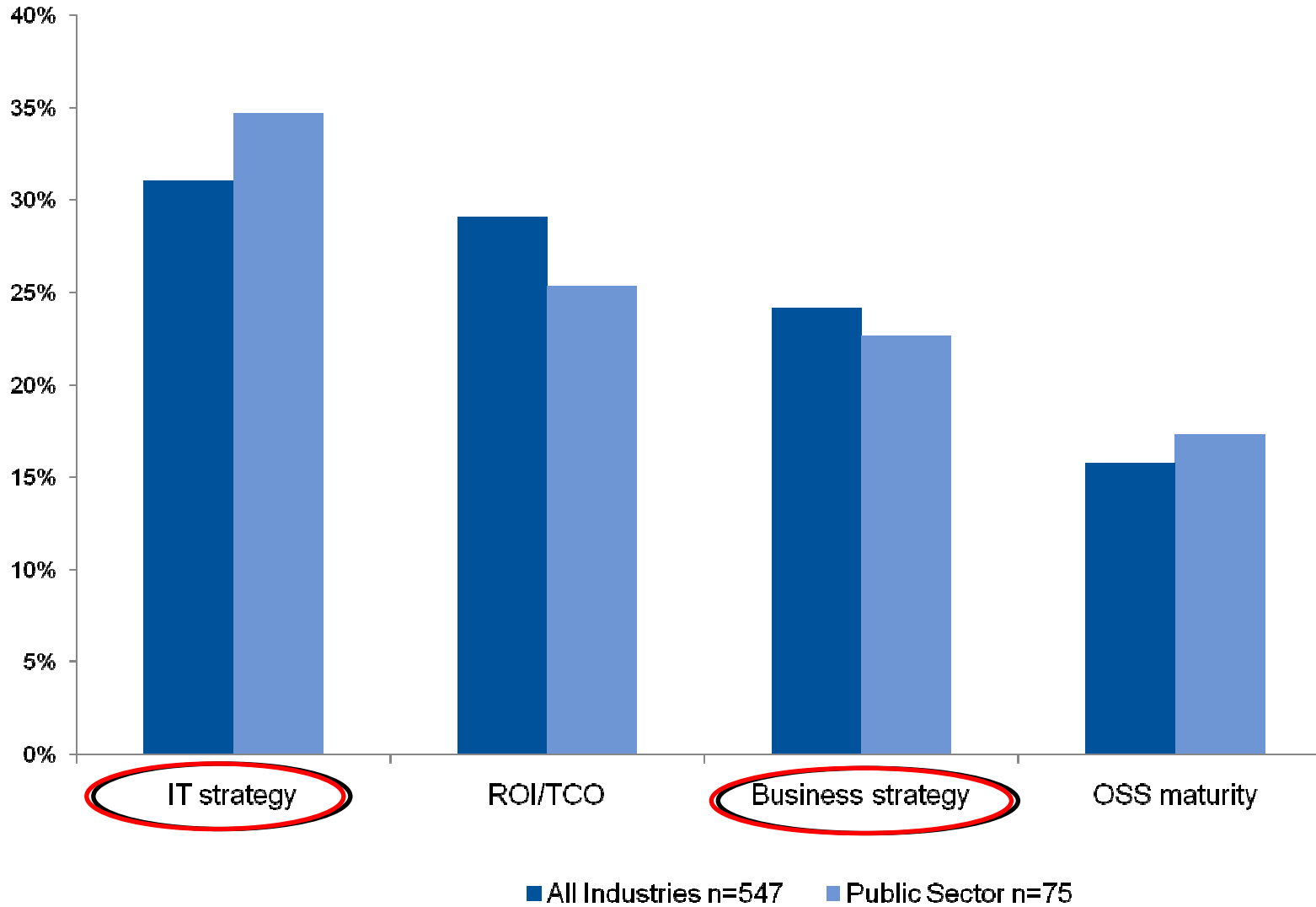
Qual è la situazione e quali i principali trend di adozione di soluzioni OSS?

79% dei rispondenti ha già adottato soluzioni di OSS

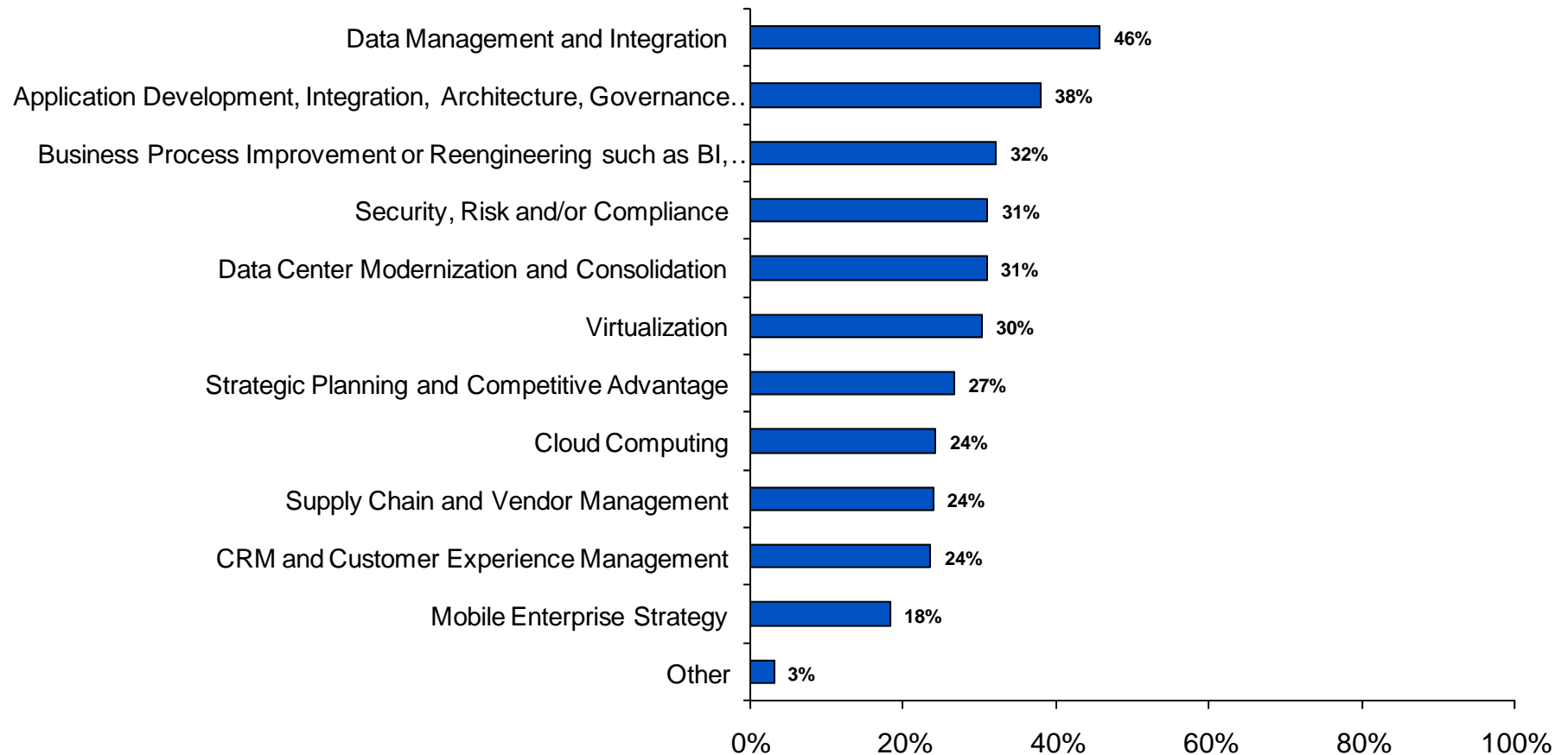


All industries, 2010, n=547

I driver di adozione più importanti?



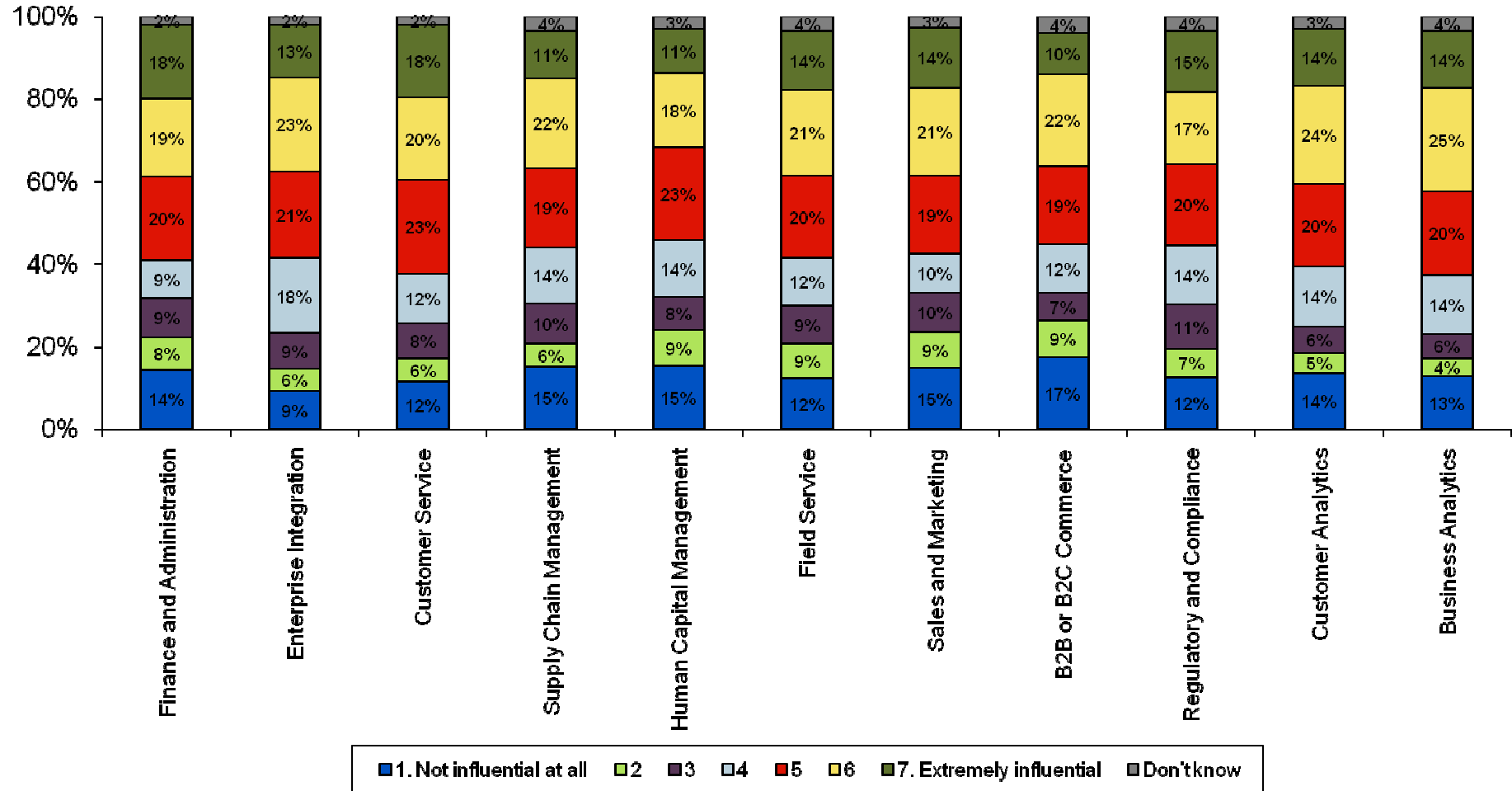
Le soluzioni OSS vengono adottate per molti progetti primari



All industries, 2010, n=547

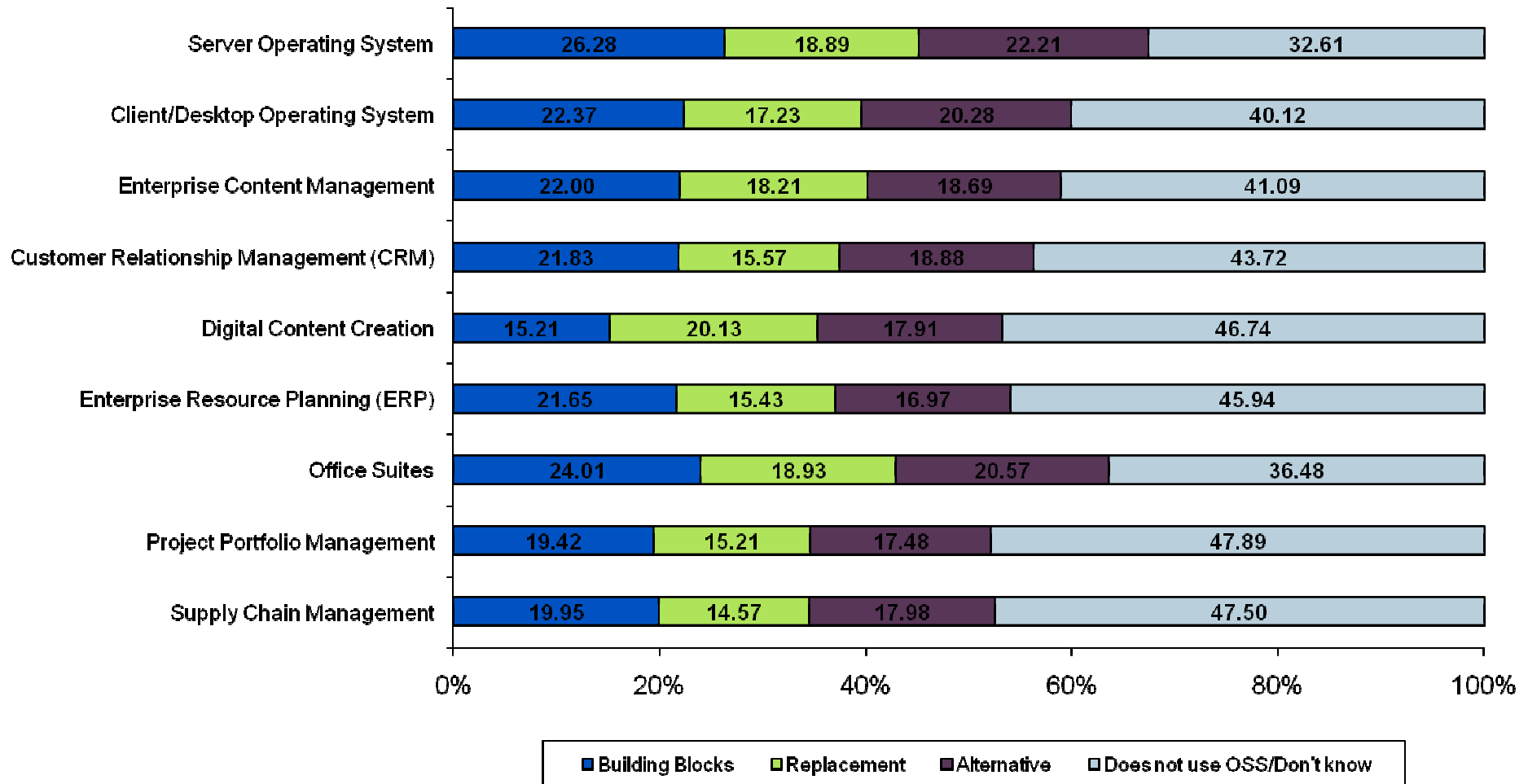
Multiple responses allowed

Le soluzioni OSS vengono impiegate per la realizzazione di molteplici applicazioni di business



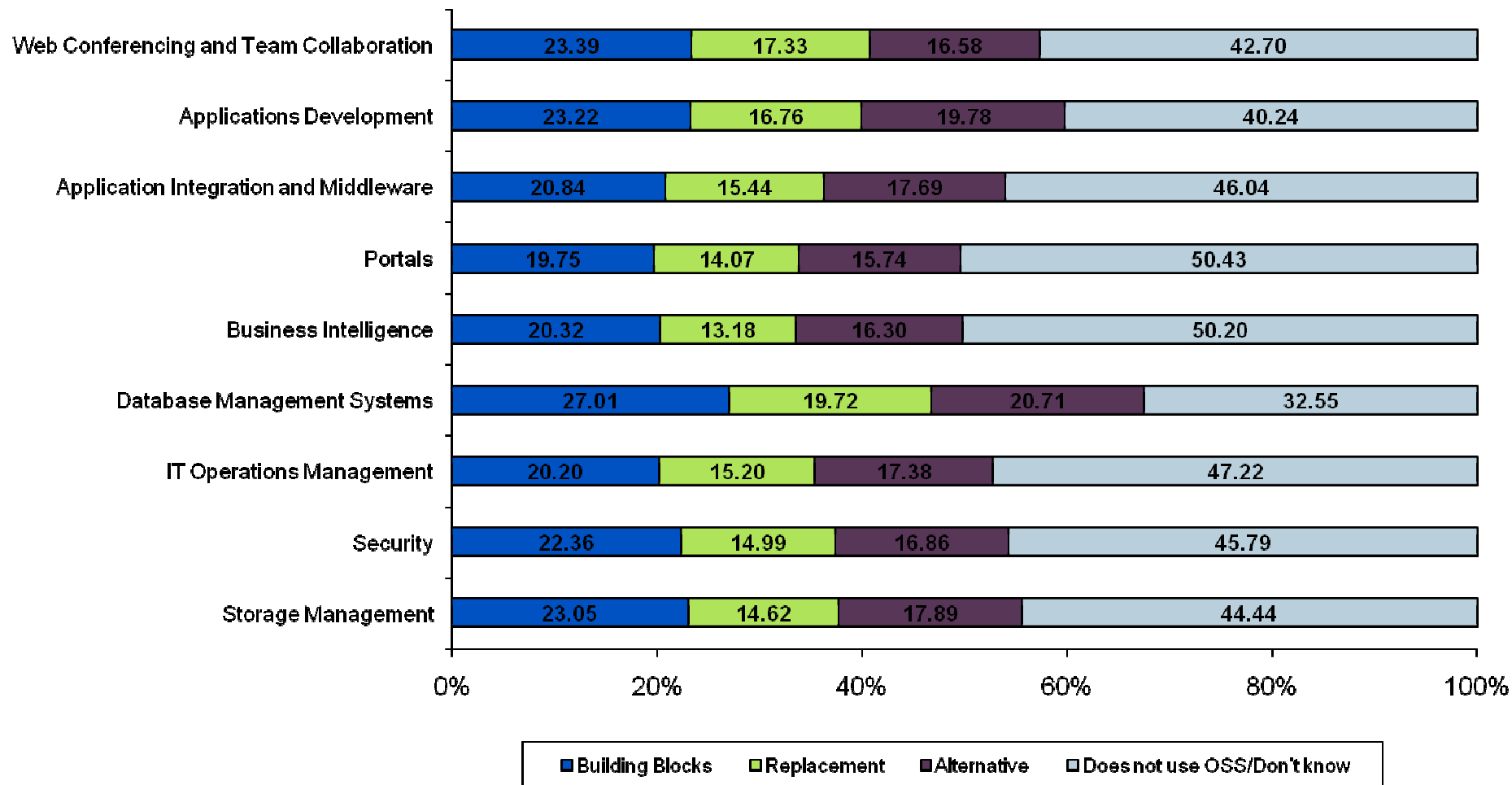
All industries, 2010, n=547

% di progetti di sviluppo realizzati con soluzioni OSS (1/2)



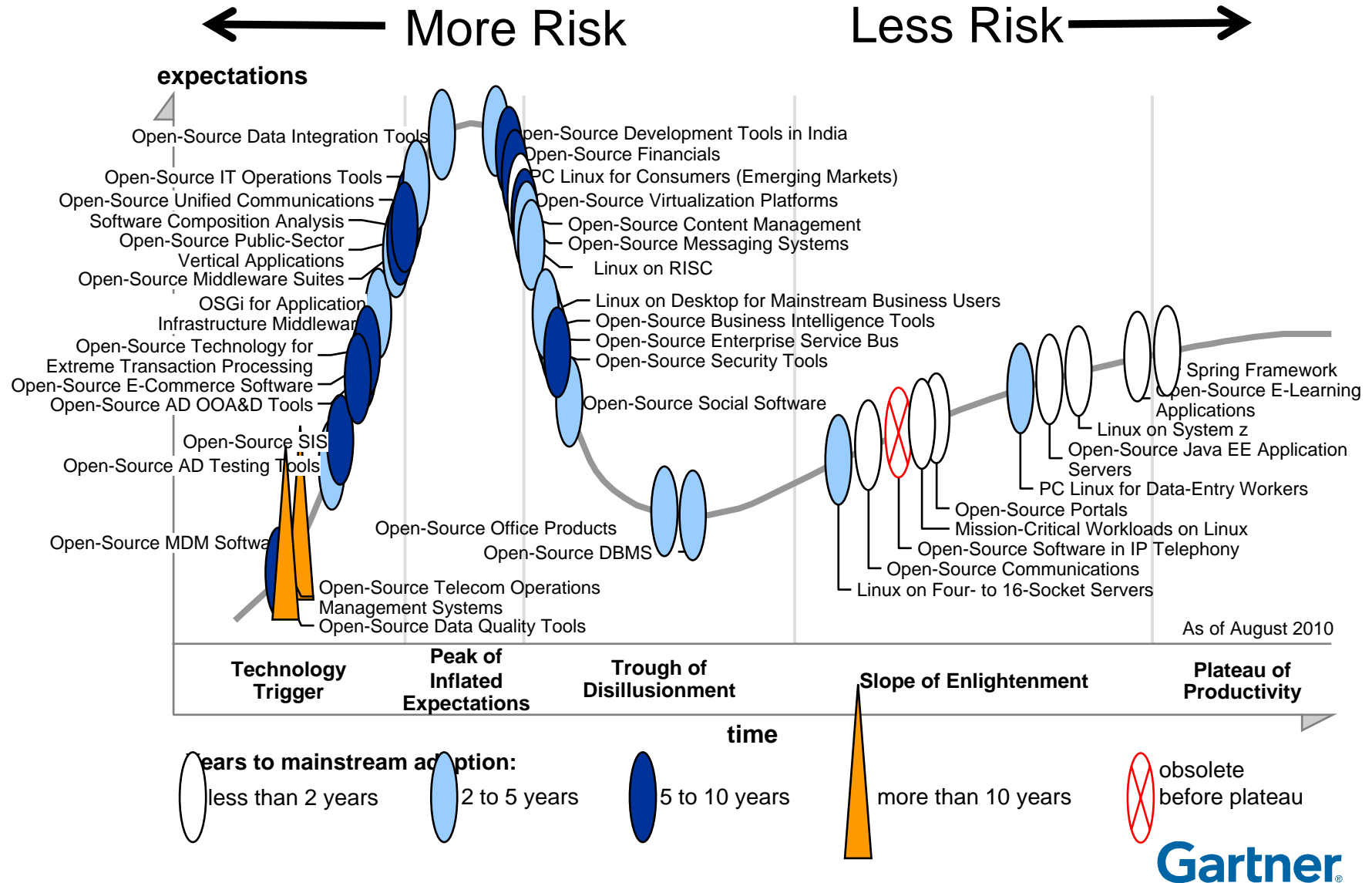
All industries, 2010, n=547
Mean Summary

% di progetti di sviluppo realizzati con soluzioni OSS (2/2)



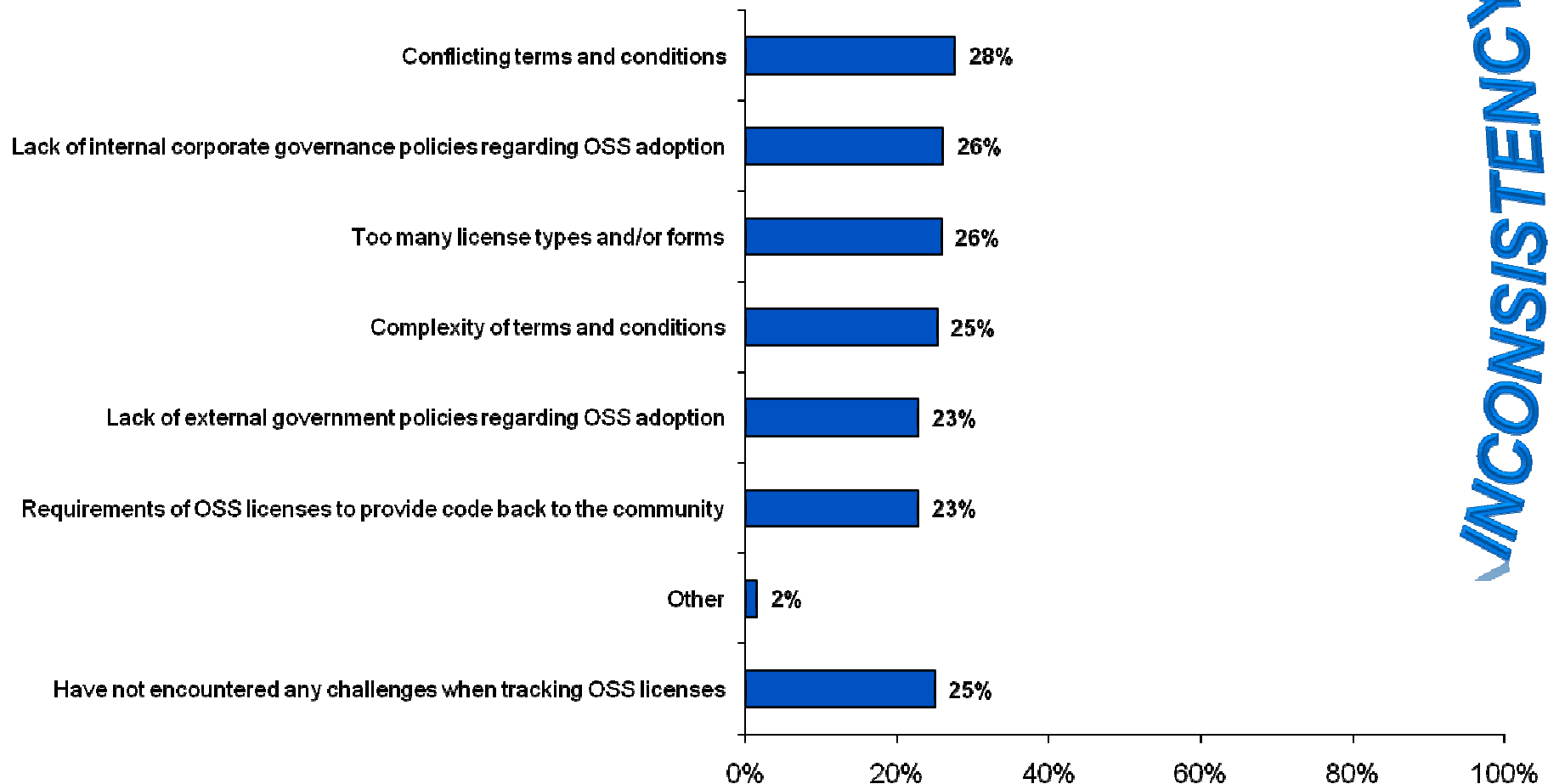
All industries, 2010, n=547
 Mean Summary

Maturità delle soluzioni OSS



Capire i nuovi obblighi fra utilizzatore e sviluppatore o fornitore, resta il fattore più critico

INCONSISTENCY



All industries, 2010, n=547
Multiple responses allowed

Il settore Pubblico traina la domanda

- Explicit acknowledgement of OSS by many governments favored early adoption and development.
- Though cost savings is a strong driver of OSS, many governments supported it not just for that reason, but also for the sake of software self-determination and to encourage local economic development programs.
- OSS also tends to favor small and midsize businesses, open information practices and interoperability.

Legiferando...

Open Source Initiatives (2000-2009)				
	Approved	Proposed	Failed	Total
R&D	81	9	2	92
Advisory	70	19	4	93
Preference	78	27	10	115
Mandatory	16	21	17	54
Total	245	76	33	354

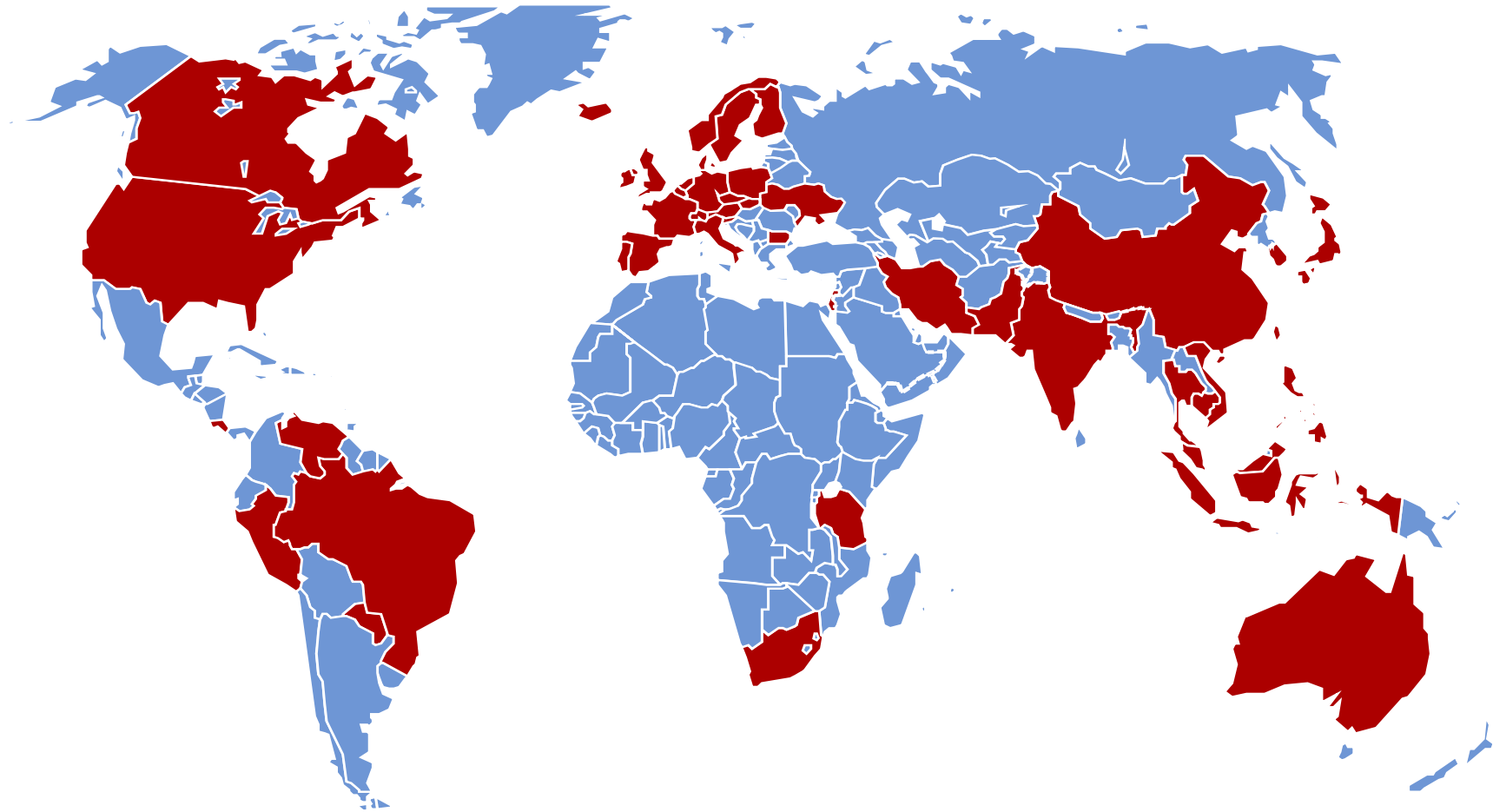
Its less about enforcement.
Its about choice
(93% of Approved)

Regional Distribution of Initiatives (2000-2009)				
	Approved	Proposed	Failed	Total
Europe	126	27	10	163
Asia	59	20	2	81
Latin America	31	15	11	57
North America	16	11	10	37
Africa	8	1	0	9
Middle East	5	2	0	7

Europe is the forerunner
(51% of Approved)

Source: Government Open Source Policies, Centre for Strategic and International Studies, March 2010

Da molte parti del mondo...



Esempi recenti di iniziative pro-OSS:

US

- Open Source for America (OSFA)
- NASA's Nebula Cloud Technology
- Open Information Security Foundation Board (OISF)

Brazil

- Serpro and Bull will develop solutions for e-government and education projects in Brazil

Germany

- German Federal Institute for Geosciences and Natural Resources in Global Earthquake Monitoring

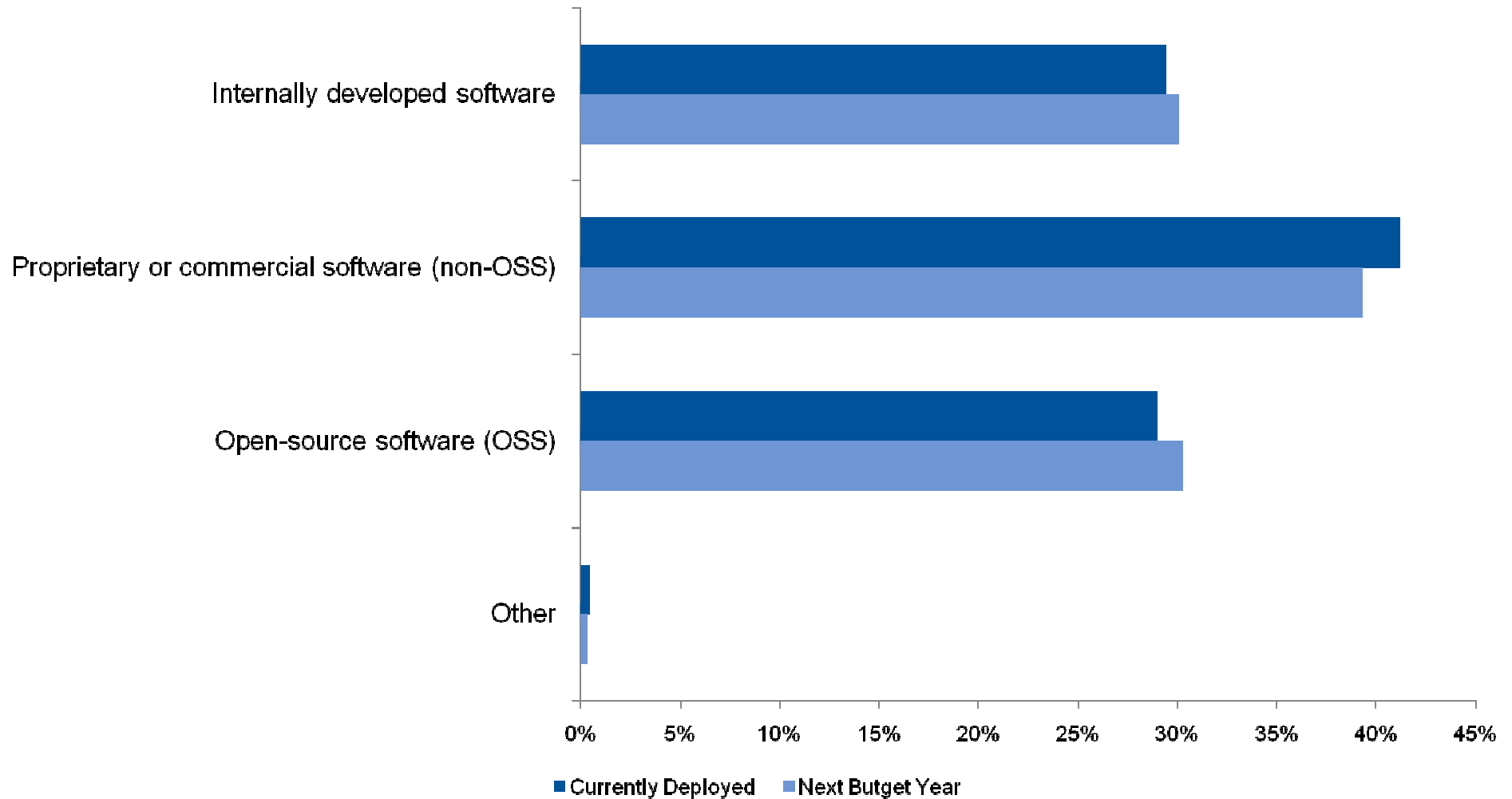
China

- Open source collaborative innovation (OSCI) program in China
- State Administration of Foreign Experts Affairs (SAFEA) trains OSS to Chinese education and business

Australia

- Australian Competition and Consumer Commission (ACCC) said it will look to a website to serve up documents under its Freedom of Information (FOI) obligations
- National Library of Australia has opted for an open source platform to drive its newly unveiled search engine

2011, come cambia il portfolio software?



All industries, 2010, n=547

Fonti di ricerca utilizzate e analisti di riferimento

- User Survey Analysis: Software as a Service, Enterprise Application Markets, Worldwide, 2010
 - Sharon Mertz, Chad Eschinger, Yanna Dharmasthira, Chris Pang
- Forecast Analysis: Software as a Service, Worldwide, 2009-2014
 - Sharon A. Mertz, Chad Eschinger, Tom Eid, Hai Hong Swinehart, Chris Pang, Laurie F. Wurster, Yanna Dharmasthira, Ben Pring
- Survey Analysis: Overview of Preferences and Practices in the Adoption and Usage of Open-Source Software
 - Laurie F. Wurster, Bob Igou, Zeynep Babat
- User Survey Analysis: Cloud Initiatives Spark Enterprise Software Spending, 2010-2011
 - Laurie F. Wurster, Hai Hong Swinehart

Domande?



Two simple steps for increasing the value of today's webinar experience

- Visit gartner.com/webinars
- Today's presentation will be available in 24 hours
- See a Schedule of upcoming Gartner webinars (plus replays of previous webinars) and share these resources with your colleagues
- Contact your Gartner account executive with any additional questions, comments or to order a complimentary copy of today's presentation