



9 out of 10 customers agree: Only services can enable hybrid

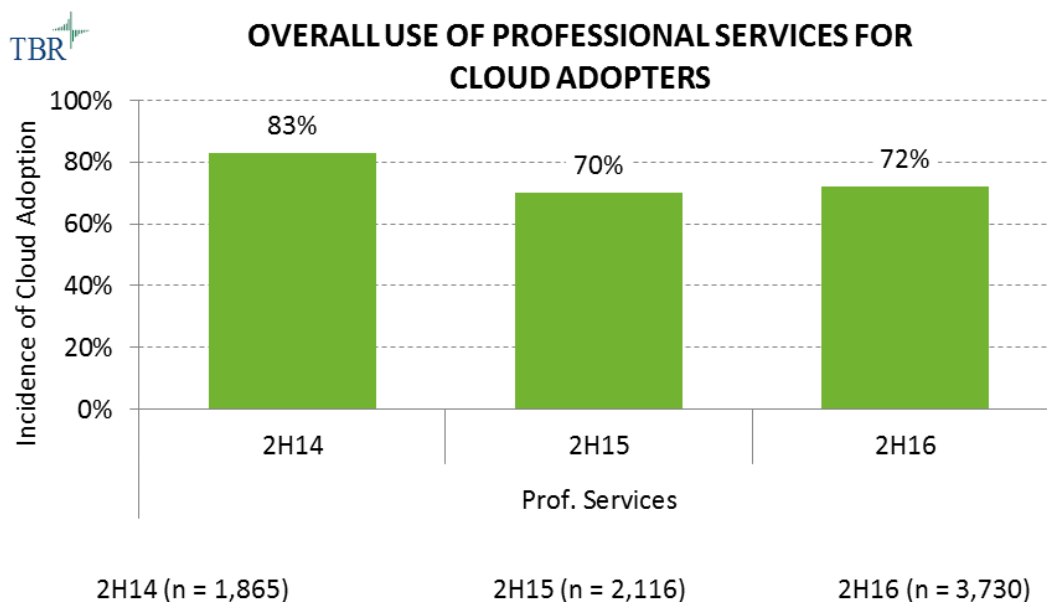
Excerpts from Technology Business Research, Inc.'s cloud professional services research* and hybrid cloud customer research** for use by Dell Technologies

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86% of hybrid adopters also use cloud professional services from either their cloud vendor or a third-party SI

If cloud in general is challenging for customers, hybrid is even more difficult from technology and business organization perspectives. The gradients of difficulty lead hybrid adopters to engage professional services firms more often than cloud adopters overall, as shown in Figure 1, with 86% of hybrid cloud adopters using outside firms, either their cloud vendor or a third-party SI, as part of their use of hybrid solutions.

Figure 1



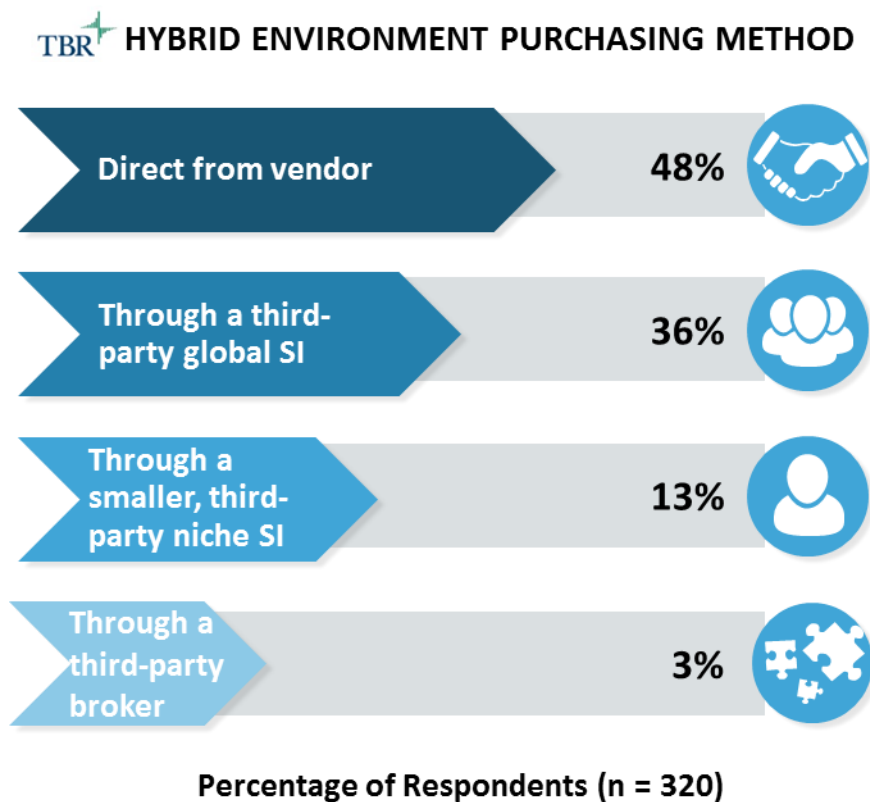
SOURCE: TBR 2H16

For providing vendors and their partners, not only do hybrid adopters need up-front assistance with hybrid solutions, they need ongoing engagement. The skills needed to deploy and manage hybrid solutions, from technology and complexity perspectives, are distinct issues that customers need to address as part of their hybrid implementations. Customers not only have to grapple with how to manage and control cloud solutions within their organizations, but they also have to manage cloud solutions at scale and during integration with other IT assets. For these reasons, cloud vendors, and more importantly, their services partners, will play a critical role in the successful implementations of hybrid cloud for their joint end customers.

52% of enterprises are looking for partners to enable their hybrid environments

Not only are a majority of customers looking to include services as part of their hybrid implementations, a majority also seek to engage with partners from the start. Of the customers TBR surveyed as part of its hybrid cloud customer research, 52% indicated they are working with an SI or broker to complete their initial hybrid purchase. This statistic highlights some of the inherent attributes of hybrid, including being a multivendor and integrated solution, and customer objectives to create a cohesive solution. Due to the increasing complexity of hybrid environments and the need for customization, TBR believes partners that can integrate across vendor solutions will be sought for hybrid environment purchasing.

Figure 2



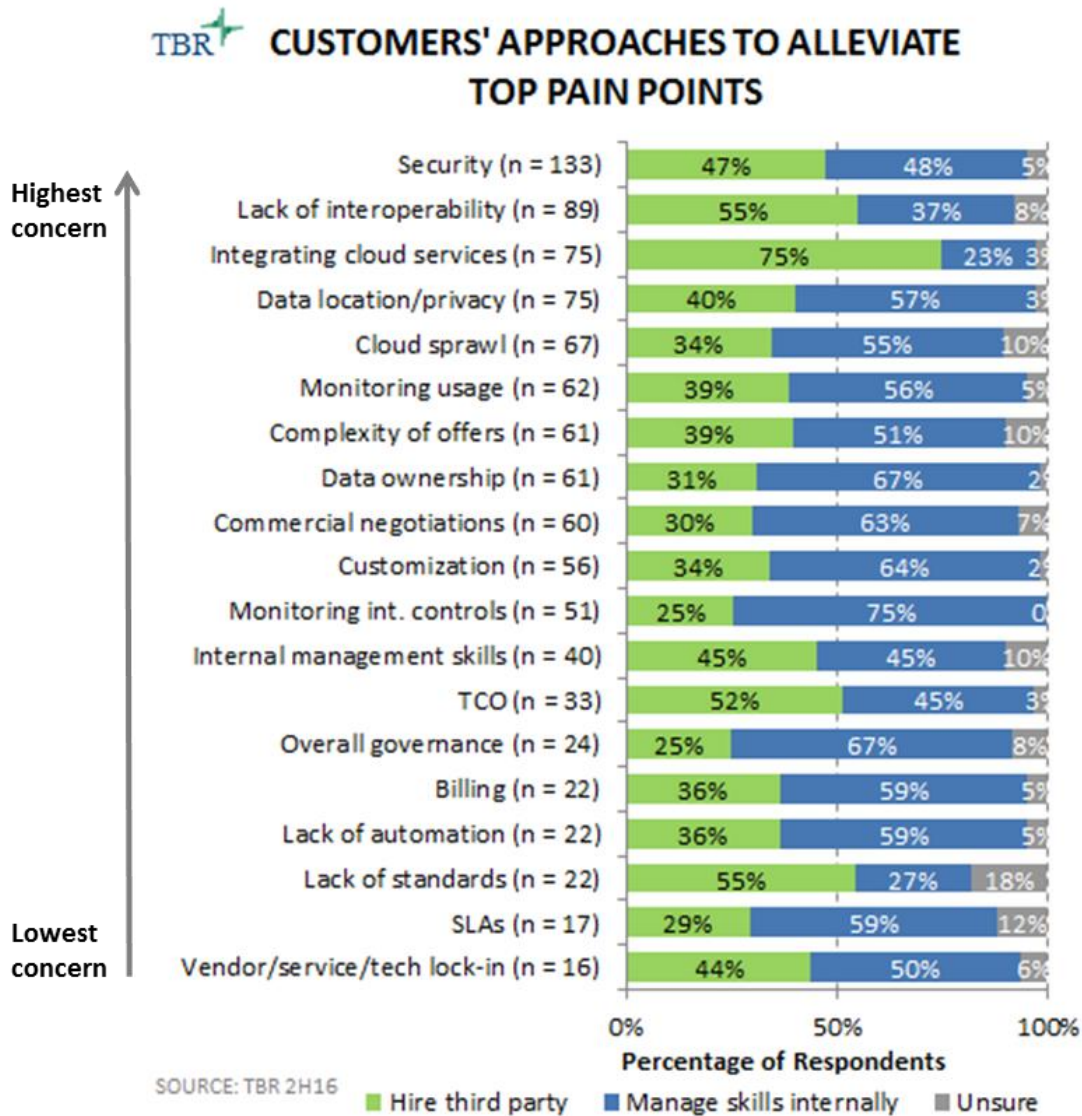
SOURCE: TBR 2H16

Note: Percentages may not total 100% due to rounding.

75% of hybrid adopters are looking for partners to help integrate their IT assets

When it comes to the distinct role partners can play for customers' hybrid environments, integration stands out as important and an area of high value. Integration of cloud services is the third most distinct pain point for hybrid customers, behind security and lack of interoperability. While not every pain point is an opportunity for partners, integration of cloud services is definitely a function customers are looking for outside help to address, more than with any other issue customers perceive with hybrid implementations.

Figure 3



*TBR's cloud professional services customer research provides semiannual analysis of the current market and future market opportunity, customer behavior and the competitive landscape for the professional services market related to cloud technologies. It enables subscribers to understand the size of the cloud professional services market and the types of use cases driving cloud professional services as well as identify decision makers in adopting organizations, align with offering expectations and differentiate versus the competitive landscape.



**TBR's hybrid cloud customer research provides semiannual analysis of the current market and future market opportunity, customer behavior and the competitive landscape around hybrid cloud and IT solutions. It enables subscribers to understand the size of the hybrid market and the types of use cases driving hybrid investments as well as identify decision makers in adopting organizations, align with offering expectations and differentiate versus the competitive landscape.

For more information on this research or to subscribe to TBR's cloud professional services or hybrid cloud reports, please contact Allan Krans at allan.krans@tbri.com.

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