



Cloud Vendor Benchmark 2013

A Comparison of Cloud Vendors in Germany

Cloud Leader Report

Executive Summary of the “Cloud Vendor Benchmark 2013” for
TREND MICRO Deutschland GmbH

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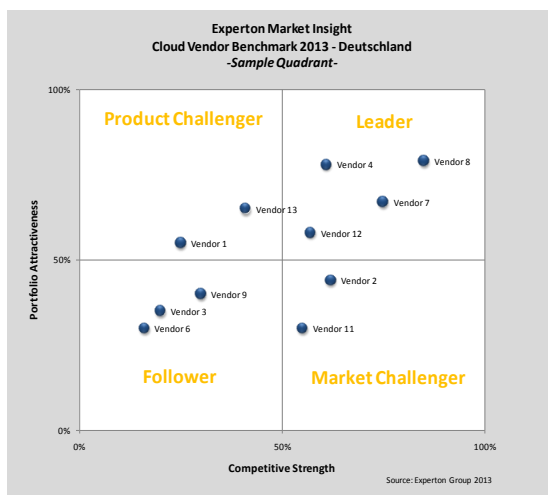


About the Study

The Cloud Vendor Benchmark 2013 is an independent, unsponsored study by Experton Group. This project was initiated in 2010 to provide CIOs and users in the dynamic cloud market in Germany an overview of market movements and the vendor landscape.

During the four years in which this study has been conducted the market has undergone profound changes. While in the initial study 11 out of a maximum of 20 relevant vendors were evaluated and benchmarked, the number of vendors increased continuously to reach 132 evaluated out of 380 relevant vendors in 2013.

The current study comprises the 14 most relevant market categories for cloud computing in Germany, which fall under the main categories cloud services, cloud technologies and cloud transformation.



The key vendors within these market categories were evaluated and positioned within quadrants.

According to Experton Group, the most interesting vendors for users are those that have been positioned in the top right part of the “Leaders” quadrant.

These vendors have a good and established market presence and also a highly attractive offering for the respective target group.

Experience in previous years has shown that Experton Group’s evaluation of vendors in its Cloud Vendor Benchmark is an excellent basis for user organizations and an optimal guideline for their evaluation, assessment and selection of suitable cloud vendors.

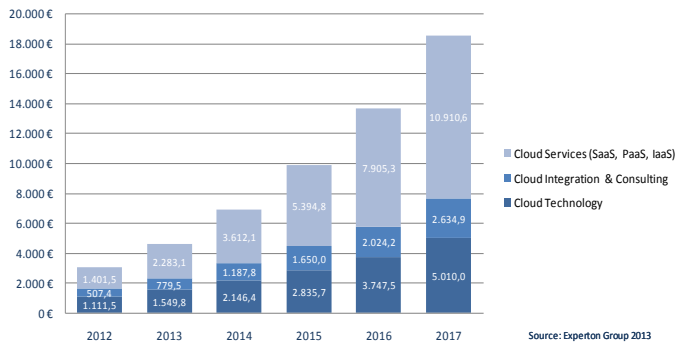
The Cloud Market in Germany

In the German IT market, cloud computing has become an established reality. This year, German companies will allocate about five percent of their IT spending to the cloud, with a tendency of even higher growth rates in the next years to come. While there are still many unresolved issues such as privacy concerns or problems related to architecture and services integration and orchestration, which cause IT decision-makers considerable headaches, Experton Group expects the cloud market to gain additional momentum, based on the advancing digitalization in practically all areas of life and business, which has a major impact on cloud computing adoption rates.

For this reason, Experton Group expects continued high growth rates (more than 50 percent in 2014), although priorities within

the individual market categories will be reweighted.

Cloud Computing in Germany 2012-2017
- Overall spending in million EUR by segments (B2B) -



Current Experton Group market figures forecast an even higher relevance of cloud services than assumed, compared to other categories (technology and integration/consulting), which is reflected in a higher share of spendings, although for many, in particular large enterprises the current focus of their investments remains on private clouds.

About Trend Micro

Trend Micro was founded in 1988 in the USA. Today, the company, with about 4,900 employees and revenues amounting to 1.2 billion USD, is among the leading vendors of security solutions and offers a large portfolio of security technologies and services for cloud users and cloud providers.

Market Segment – Cloud Security and Services

While cloud computing offers users the fast and flexible usage of applications and data, it also presents challenges when it comes to secure infrastructures, connections,

applications, devices and data. As hybrid deployment concepts, i.e., the combination of enterprise networks and data centers with the public cloud, show, companies are no longer closed systems with only few access points that are easy to control. Today, a company is a value-added network connecting thousands of partners, suppliers and users through core applications and processes.

With integrated cloud strategies that also link traditional enterprise systems such as ERP, databases, HR etc. with modern cloud applications and mobile apps, there is no hard shell any more to protect the heart of the enterprise. Security concepts and security components must be adjusted to address the requirements of the new fluid and virtualized world.

For this reason, this year’s “Cloud Vendor Benchmark 2013” also examines and evaluates the offerings and competitive strength of security vendors in the German market who support cloud data center operators to help them secure and monitor their cloud infrastructures and cloud services. The evaluation is mostly based on the breadth and depth of offerings required to ensure the integrated protection and proactive security management of users’ cloud environments.

Core cloud security segments include the following:

- Business continuity & disaster recovery;
- Data center operations & network security;

- Incident response;
- Application security;
- Encryption & key management;
- Identity & access management;
- Virtualization security.

instance, Trend Micro does not only have a broad and specialized technology and services portfolio that is above average, but has also aligned the whole company strategy, with a much stronger focus on cloud challenges than most of its competitors.

Under the motto “Securing Your Way to the Cloud” Trend Micro has adjusted existing and developed new products; the vendor has also managed to excellently align the go-to-market and the consulting offerings to this new strategy and has hired the respective skills and resources. One of Trend Micro’s greatest strengths is its offering for cloud service providers; they can use the “SecureCloud“ and Trend Micro’s “Deep Security“ solutions to secure and monitor their customers’ virtualized landscapes, based on roles and independent of the deployment concept. At present, Trend Micro is the clear leader in the cloud security technologies & services category, setting the pace for its competitors.



Within this analysis, Experton Group has evaluated vendors of security products and their efforts to adjust their products to cloud computing requirements, for instance, whether they drive virtualization security or content analysis to prevent malicious code and Trojans from infiltrating enterprise networks through users’ devices.

Trend Micro – Strategy and Portfolio

During the last 24 months, Trend Micro has been most consistent in adjusting its portfolio to cloud risks and threats to address users’ related challenges. For

USPs & Competitive Strength

Among users of large cloud or virtualized environments, one of Trend Micro’s unique selling points is the high degree of automation to be achieved when implementing and executing security guidelines. For instance, it is possible to define and execute standardized, consistent firewall policies for hundreds of VMs, which minimizes risks due to manual errors as well as administration efforts often

caused through the manual execution of security policies. Also Trend Micro's "Deep Security" technology is agentless, ensuring a minimum consumption of resources and a high degree of efficiency – a key factor of success, considering the fact that additional security features consume additional resources, also in the new world of cloud computing, and must be implemented correctly and maintained accordingly. Trend Micro offers a leading-edge architecture, which is currently optimized and certified for the market-leading VMware virtualization solutions and the Amazon AWS cloud platform, ensuring integrated security of hybrid cloud environments across multiple deployment models (from AWS to the internal data center).

Trend Micro also makes significant investments to develop security mechanisms for SAP environments within the cloud. First releases and innovations can be expected in the course of this year.

Outlook

Trend Micro has the great opportunity to achieve above-average benefits from the current cloud evolution. Midmarket businesses, large enterprises and providers alike cannot avoid building and operating cloud infrastructures, which require respective investments in cloud security services. While Trend Micro is certainly "ready to go", the vendor must help users to understand the specific characteristics of cloud security.

In the current market phase, it is of utmost importance that users understand which part of their security strategy must be reviewed and which part can be left as it is.

About Experton Group

Experton Group is a leading fully integrated research, advisory and consulting company with German offices in Munich, Frankfurt and Kassel. The company has 80 experienced analysts in Europe who support mid-sized and large organizations with their IT strategic planning and implementation. More information on our cloud computing research can be found under

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