



# Hybrid at Scale

How South African Enterprises are Adopting Private and Hybrid Cloud Strategies

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# Three Chapters of the 3<sup>rd</sup> Platform Era

 Chapter 1 | 2007+  
Experimentation

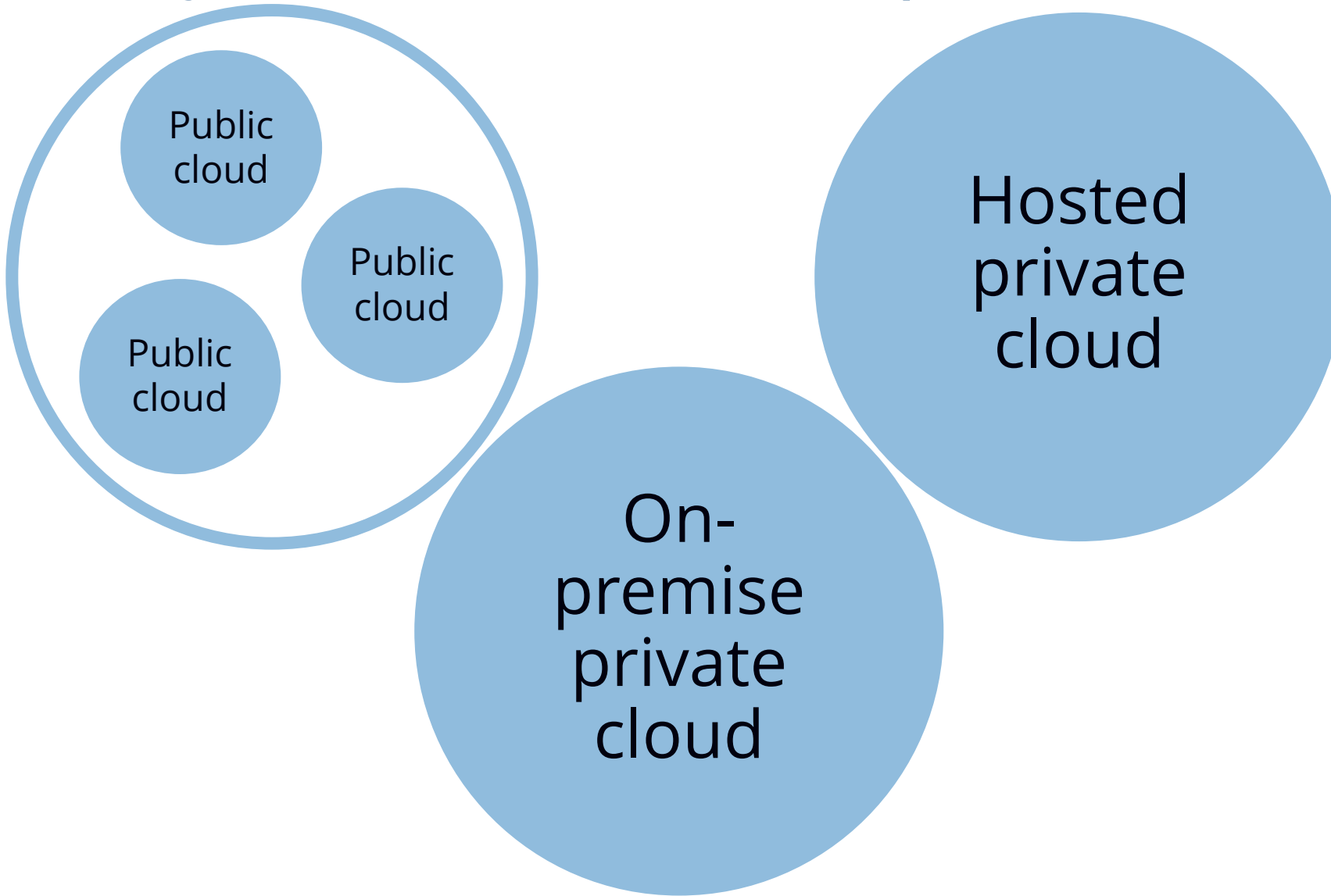
 Chapter 2 | 2015+  
Multiplied Innovation

 Chapter 3 | 2022+  
Autonomy



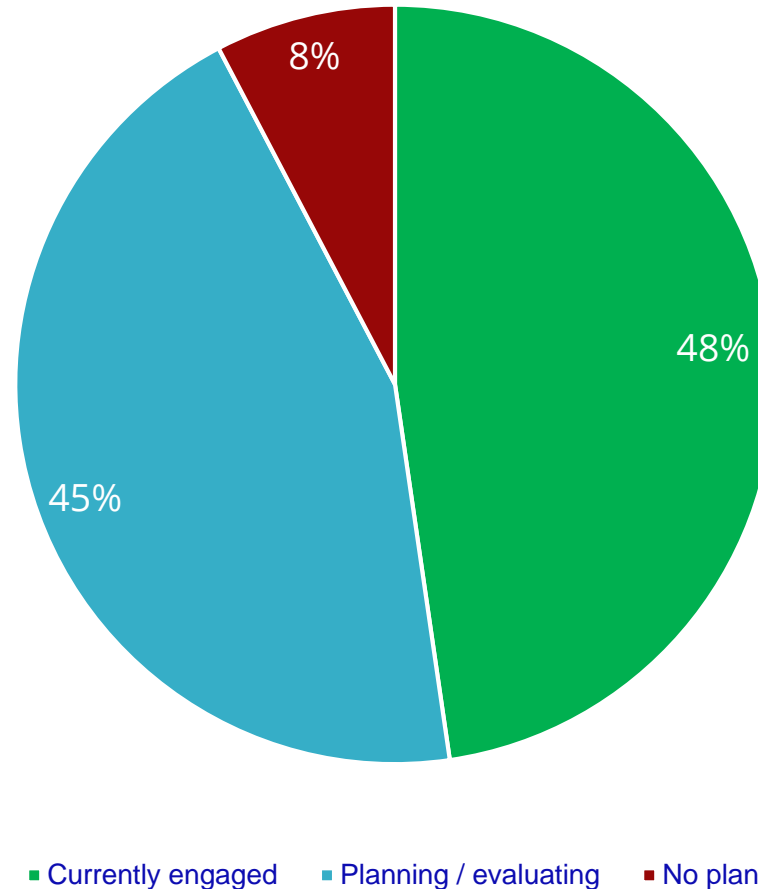
- **By 2020, >90% of enterprise IT organizations will commit to multi-cloud architectures**
- **By 2020, 67% of all enterprise IT infrastructure and software spending will be in cloud-based offerings.**

# Hybrid IT Cloud Adoption



- **By 2019, 30% of enterprises will spend more on public cloud than on datacenter operations**
- **By 2020, 75% of organizations will have cloud APIs as part of their DX strategy**

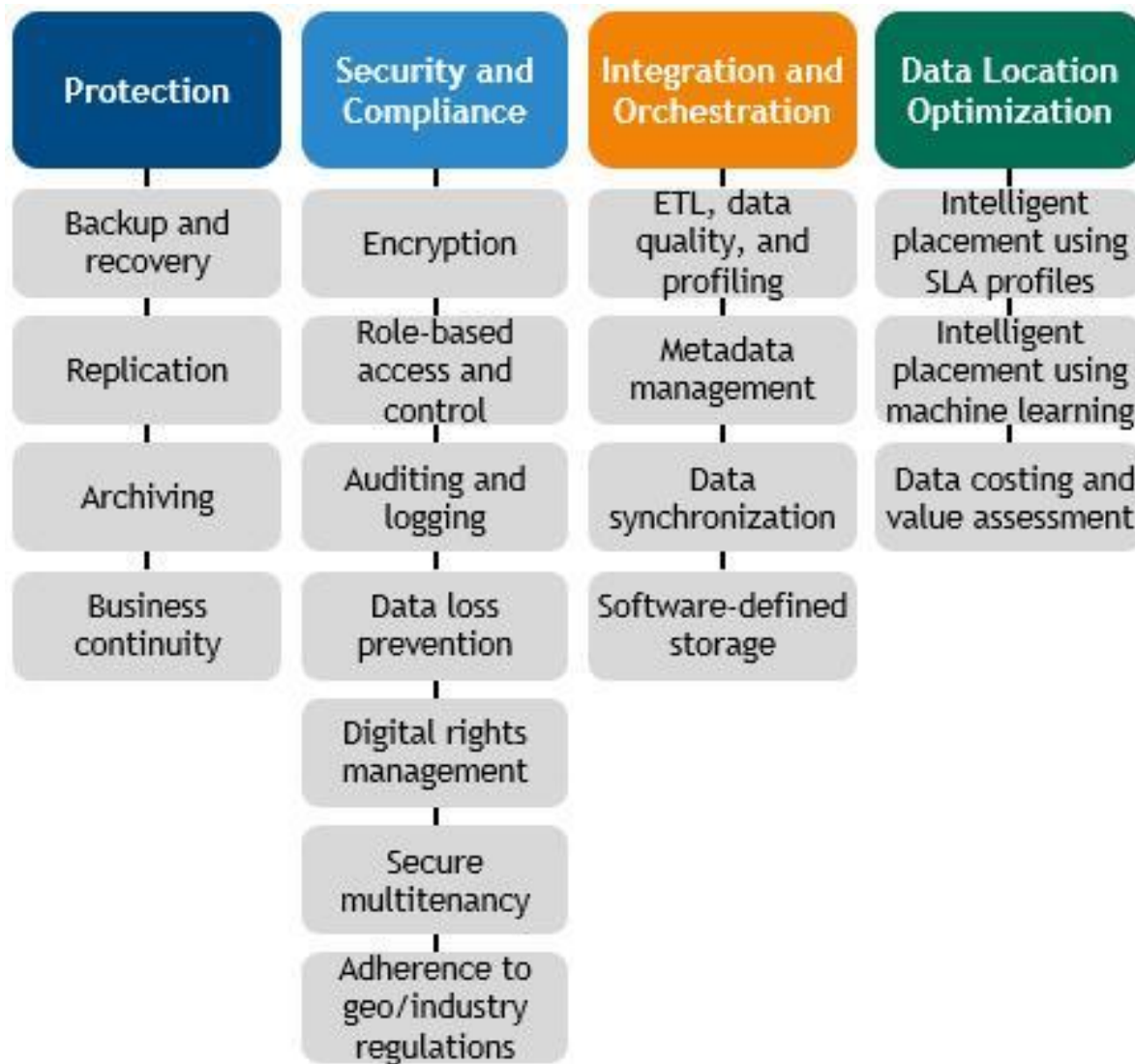
# SA Digital Transformation >90% of SA CIOs



- DX maturity varies widely and is still largely tech-centric

- **By 2021, 50% of enterprise infrastructure will employ AI to improve performance**
- **By 2021, 25% of infrastructure services will offer autonomous self-management**

# Hybrid Cloud Primary Segments



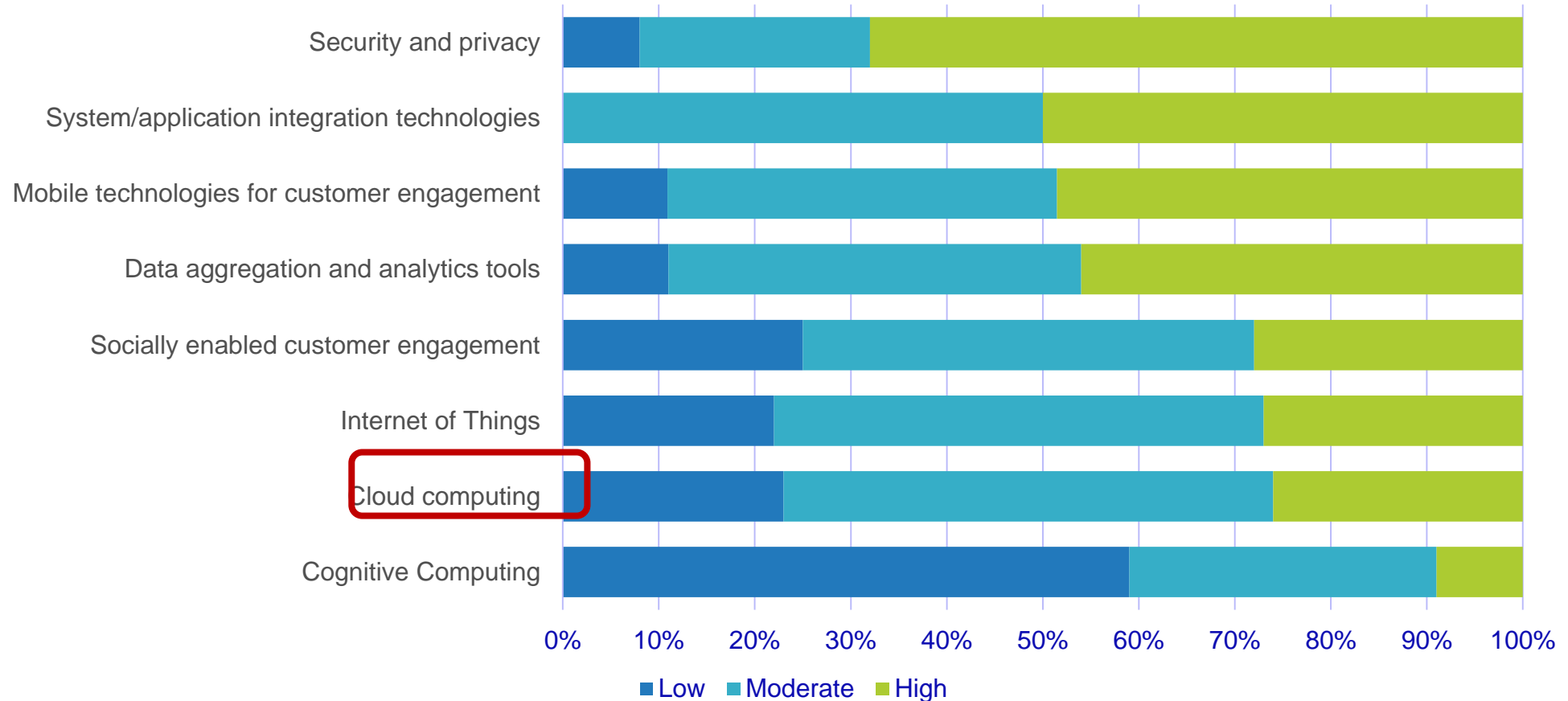
## ■ Sample use cases

- Agile application development
- Cloud workload bursting/balancing
- BC/DR risk mitigation
- GRC requirements
- Cost management
- Self-healing/-management



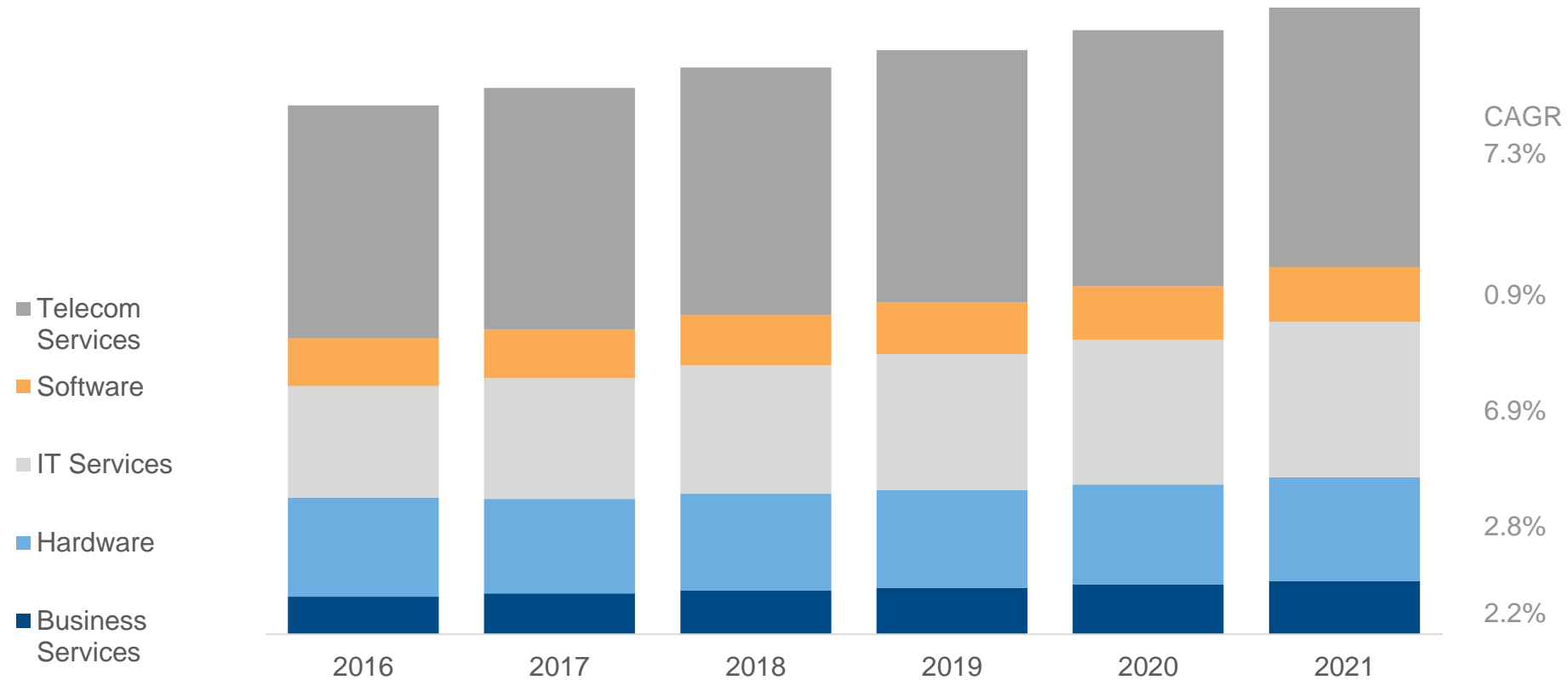
- **By 2020, over 70% of cloud services providers' cloud revenue will be mediated by the channel**

# Components of Digital Transformation in SA



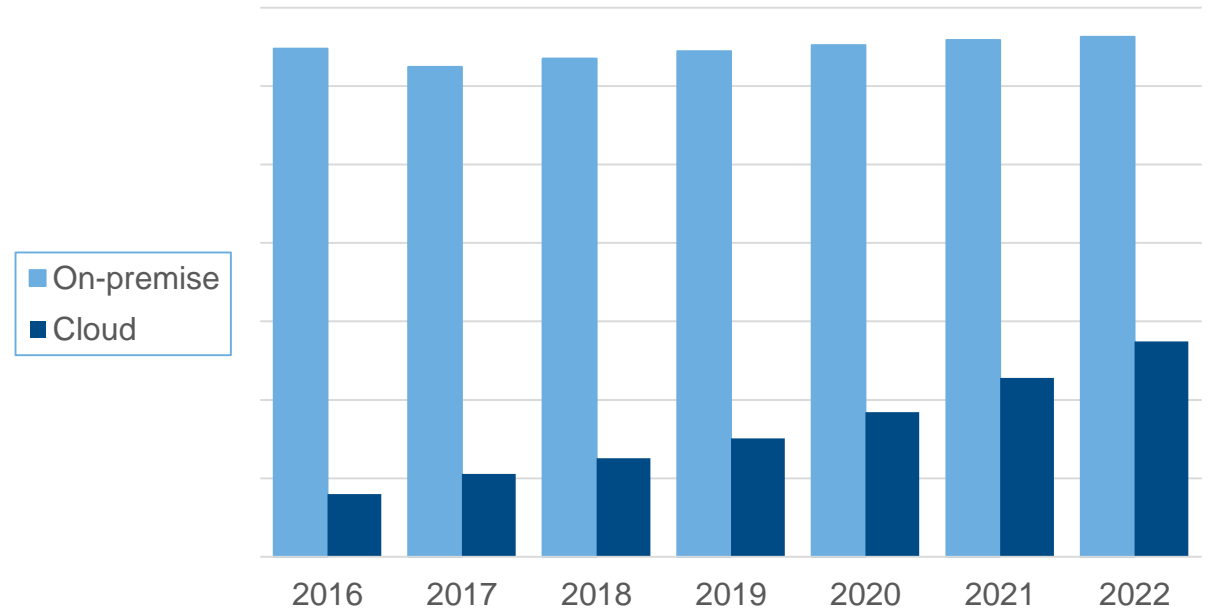
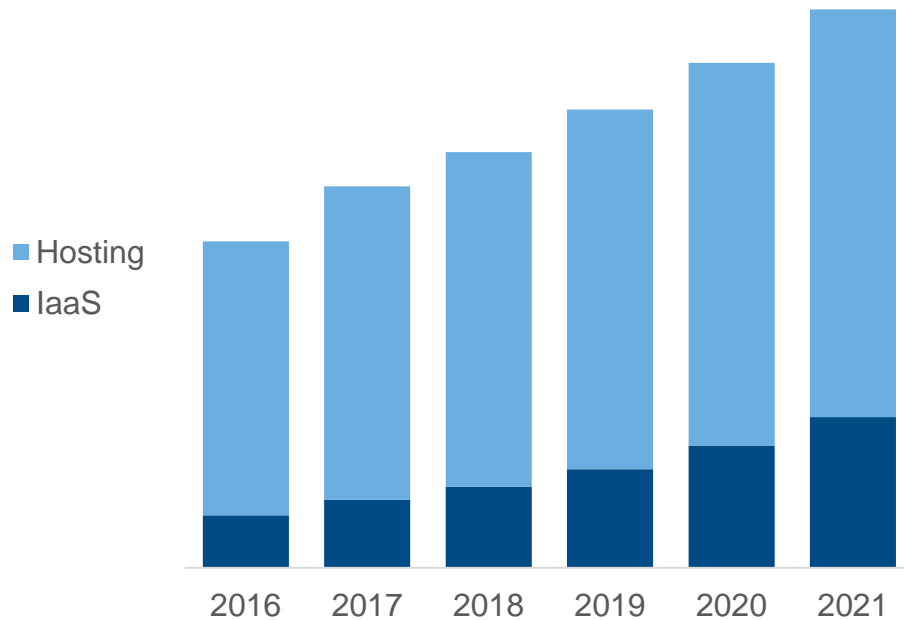
- Focus on cloud capabilities, not cloud products

# South Africa: IT spending under pressure



- South Africa is a R360 billion IT market, growing at 3.5% 5-yr CAGR

# Cloud attacks software spend, not hosting or infrastructure



- Hosting + IaaS is ~R670m. Hosting growing at 8.3%, IaaS at 23.5%
- Software + SaaS is ~R1.5bn. Software growing at 1.2%, SaaS at 21.1%

# For More Information

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