

PaaS market perspective

March 2015

@cote

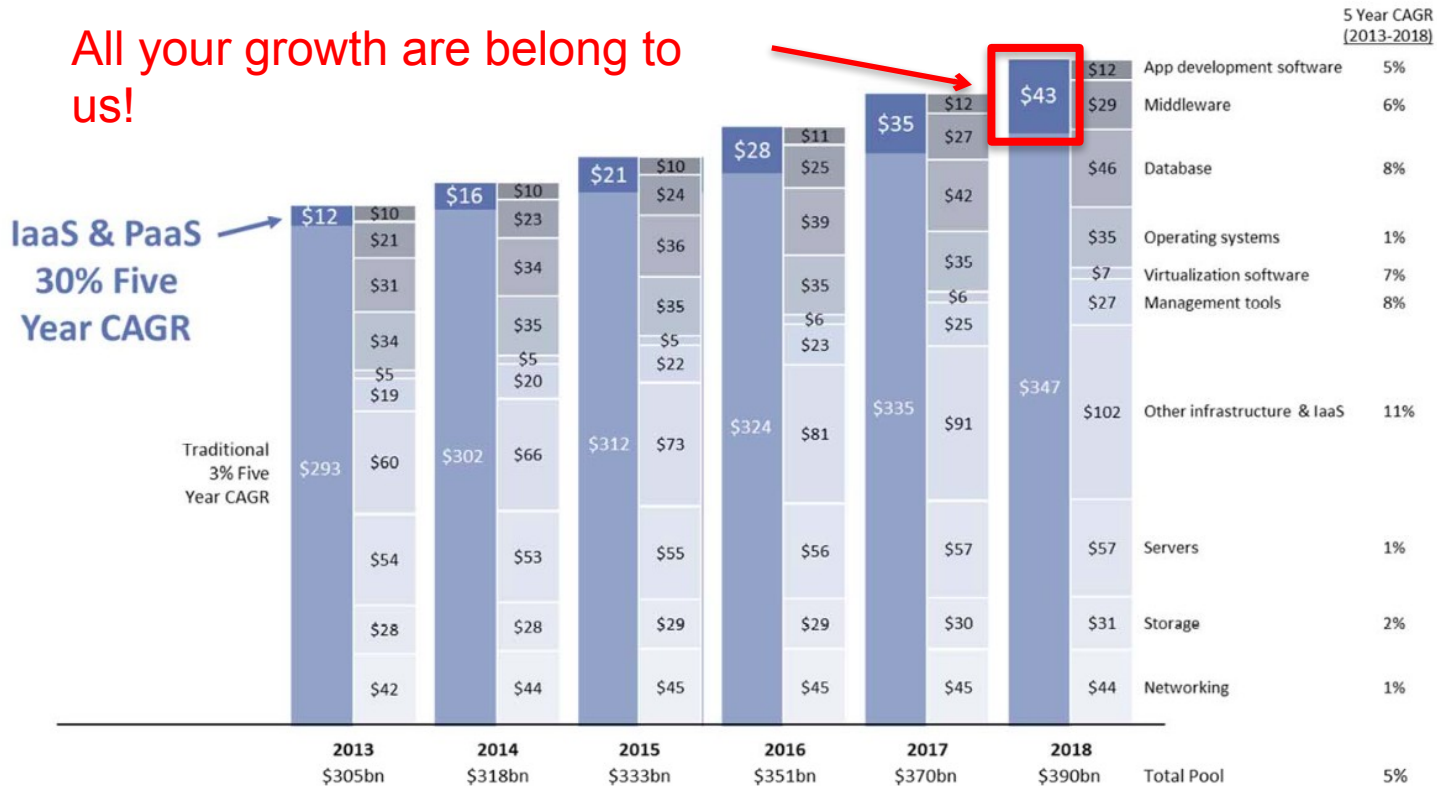
Hello!



- @cote – Director, Technical Marketing at Pivotal
- Former industry analyst at 451 Research and RedMonk
- Corporate Strategy & M&A at Dell
- Recovering code monkey
- More: <http://cote.io> or cote@pivotal.io

Exhibit 2: Cloud platform TAM and total "pool" of enterprise spend cloud platform vendors can potentially disrupt (\$bns)

All your growth are belong to us!



"Marketshare

Cloud =

Cloud =

" Source: Gartner 4Q14 and December 2014 forecasts, Goldman Sachs Investment Research. Traditional includes infrastructure software and data center spend (excluding enterprise communications applications). Note: "Other infrastructure software" includes data integration and data quality tools, security, storage management and IaaS.

IT can generate the best competitive advantage with developers

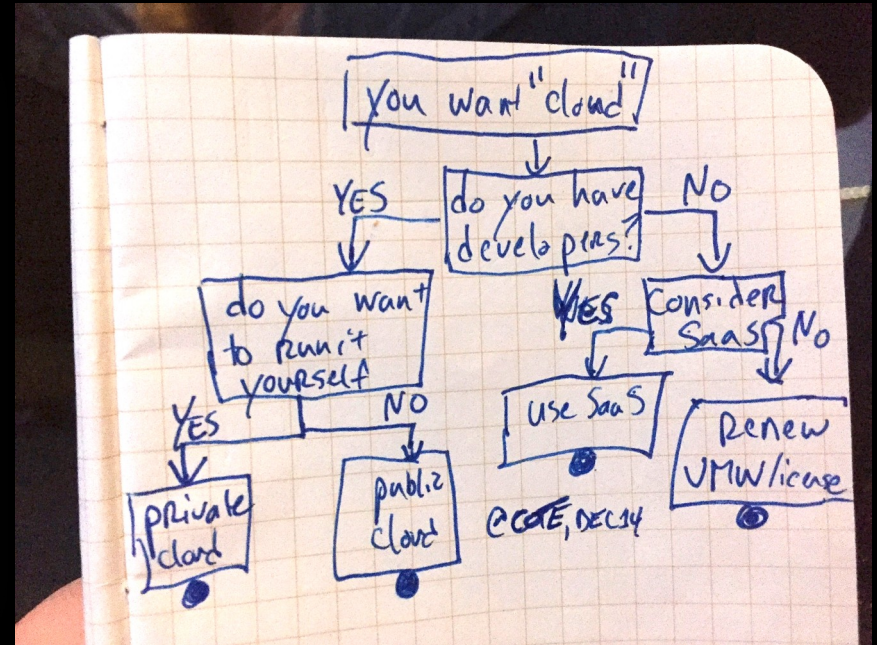
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Colleague and friend @cote came up with the equation {IT-SaaS=what?}. Such a concise way to summarize the grand transformation in #IT!

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10:49 AM - 5 Mar 2014



It's not enough to just get a blinking cursor

Gartner Blog Network

Thomas Bittman
A member of the Gartner Blog Network

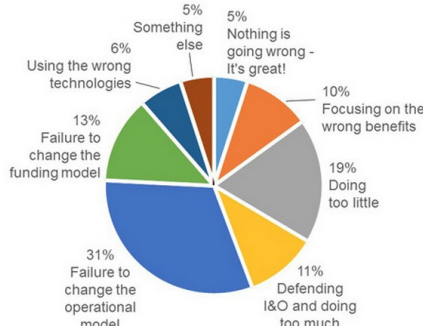
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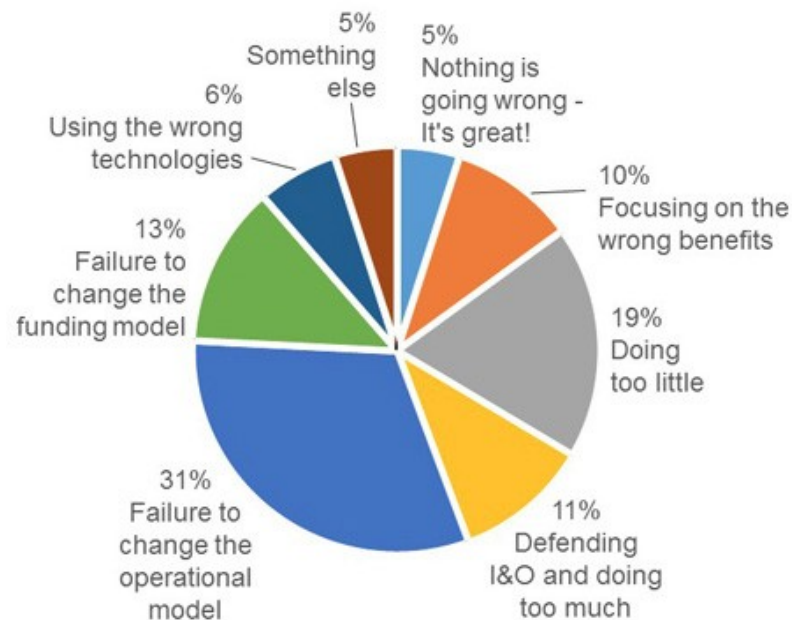
Problems Encountered by 95% of Private Clouds

by Tom Bittman | February 5, 2015 | 28 Comments

In my last blog post, I identified ten reasons private clouds were failing. I consolidated that list to six items (below), and polled attendees at Gartner's Datacenter Conference in Las Vegas in December. I asked the question "What is going wrong with your private cloud?" I was a little surprised that 95% of the 140 respondents (who had private clouds in place) said something was wrong with their private cloud.

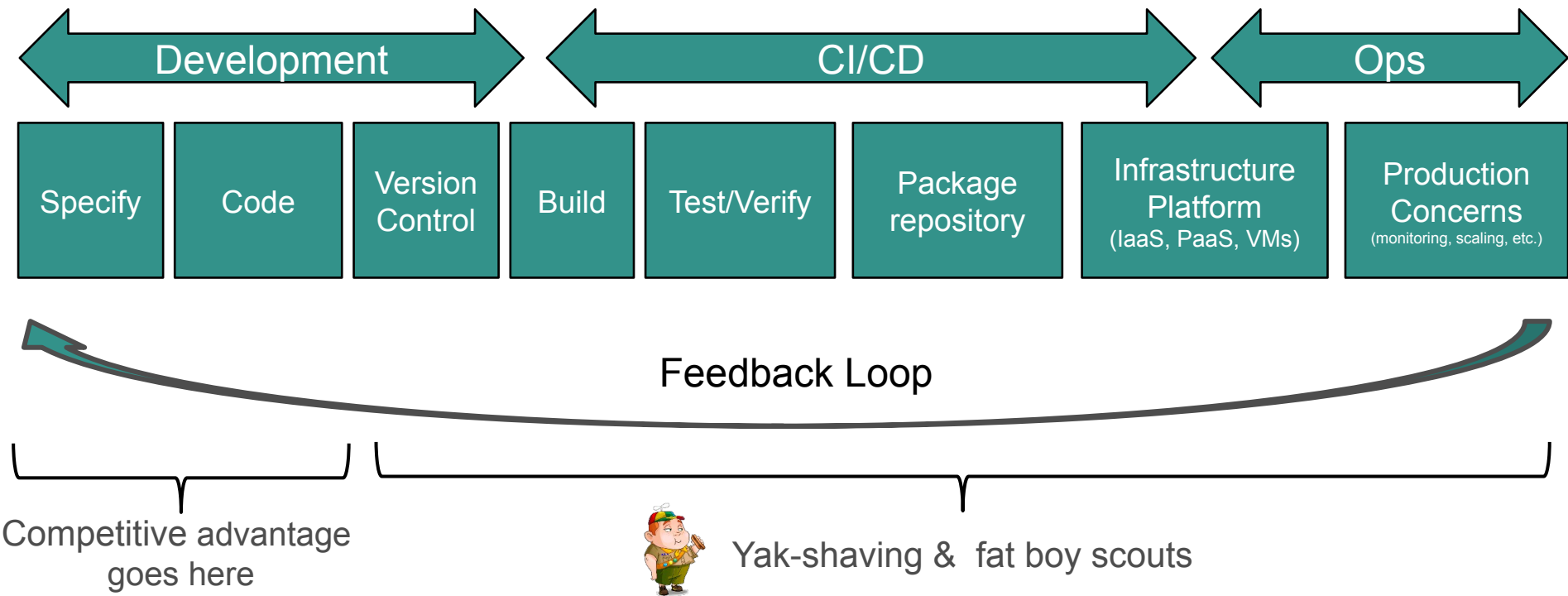


Problem	Percentage
Failure to change the operational model	31%
Doing too little	19%
Defending I&O and doing too much	11%
Failure to change the funding model	13%
Focusing on the wrong benefits	10%
Using the wrong technologies	6%
Something else	5%
Nothing is going wrong - It's great!	5%



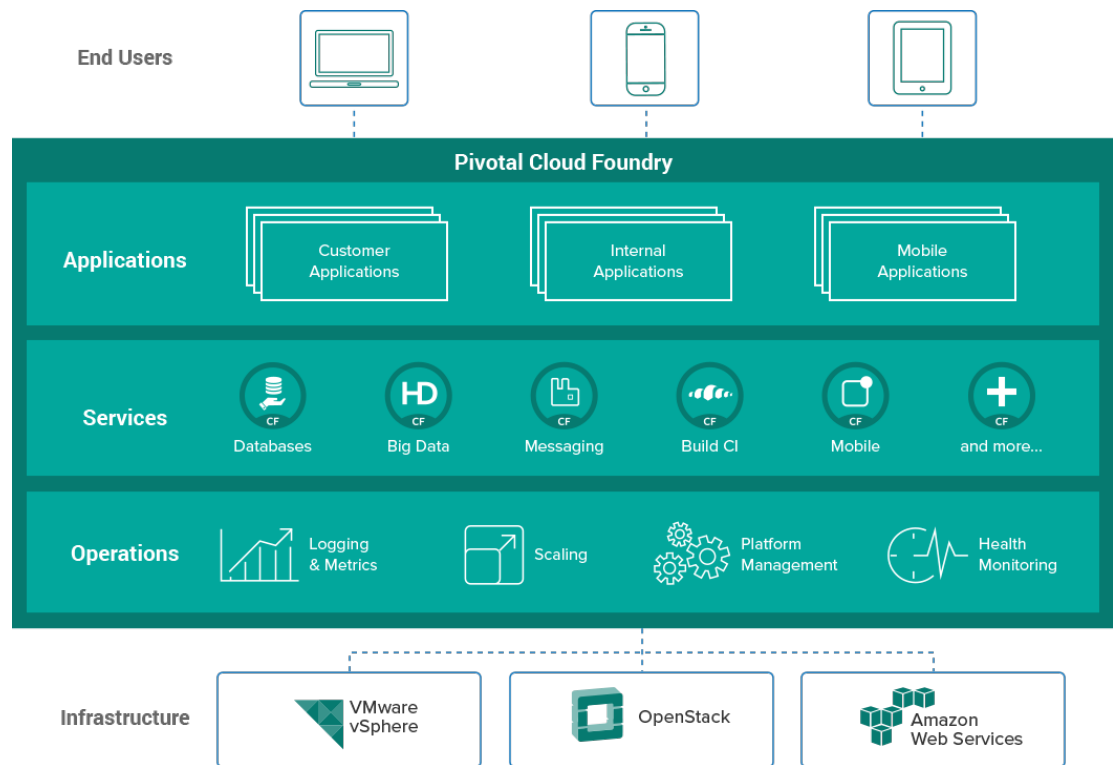
Note: n=140 respondents "who had private cloud in place" at Gartner's Datacenter conference, Dec 2014.
Source: "[Problems Encountered by 95% of Private Clouds](#)," Tom Bittman, Gartner, Feb 2015.

Beyond the blinking cursor, a platform



Source: [yak-shaving overview](#); [fat boy scouts as a metaphor for slowing down the pipeline](#); [fat boy scout image from GilJimbo](#).

Exploring the PaaS market with Pivotal Cloud Foundry



After just 1 year in GA:

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- 40+ customers



More details: <http://pivotal.io/platform-as-a-service/pivotal-cloud-foundry>

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Thanks!

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Slides: <http://cote.io/paas-market>