

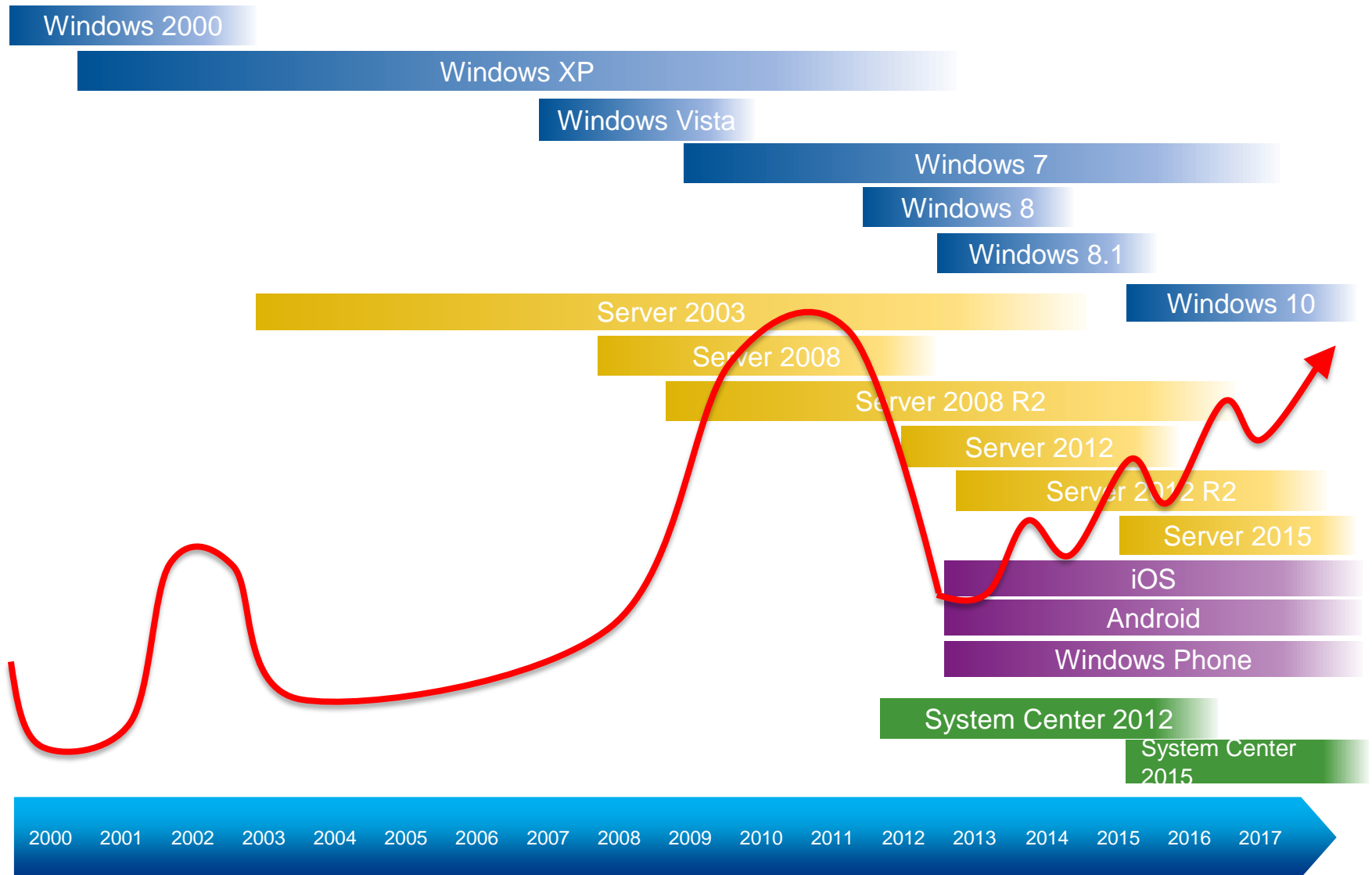


SoftSummit™ 2015

Industry Trends



Smaller, More Frequent Migrations



Enabling Mobility



Rise of Software as a Service (SaaS)

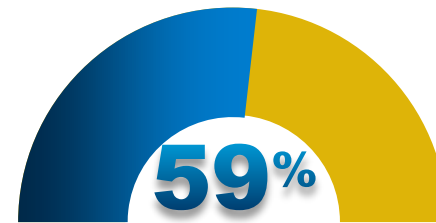
Market Shift

20%

SaaS Market

Annual growth through 2020

(source: Gartner)



of Cloud Services is SaaS by 2018.

(source: Goldman Sachs)

Benefits driving move

- Ownership move from IT to business units
 - Drive from Capital Expense (CapEx) to Operating Expense (OpEx)
- 'Rent vs buy' subscription cost structure
- Flexibility – Don't like it, switch

Operational Challenges Decreasing

- Multi tenancy more standard
- Expanded global data center footprint, addressing:
 - Localization
 - Disaster Recovery

Moving Apps to the Cloud



Source: Gartner, *Hybrid Clouds and Hybrid IT: The Next Frontier*, Thomas Hiltman, June 2014

Modernization & Consolidation

- IT wants utility-like environment
- Application provisioning efficiencies
- Adapt to continually evolving business needs and requirements
- Server 2003 end of life

Emerging Ecosystem

- Cloud Management Platforms
- IT Service Management expands to enable effective cloud management
- Containers, Powered by Docker, Will Reshape Virtualization (*IDC 2015 #1 Prediction – System Infrastructure*)

IT Service Management

“For IT to be effective requires good control and accurate data, which requires SAM and Service management to work together” - BCS

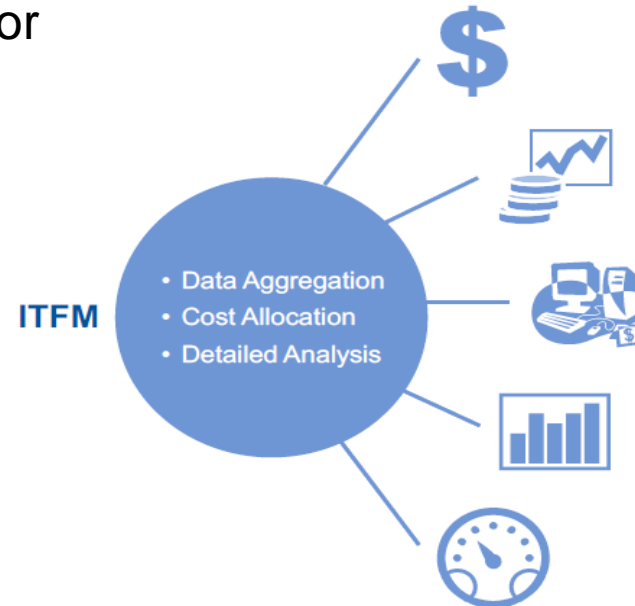
- IT Service Management has a lot to gain from effective Software Asset Management
 - IT services are built with IT assets
 - SAM is a separate business process but sharing data/integrating into processes is important
 - Each process benefits from the other’s information
- Take IT from a cost center to a service delivery entity
 - Requires building a service, owning and managing the cost of a service and knowing who uses the service



IT Financial Management

“By 2016 demand for ITAM and ITFM data will double as businesses demand greater insight and transparency into IT Spend” - Gartner

- Software costs are 2nd behind labor
- Transparency and group level showback enables awareness
- IT delivers services or acts as a service broker



Source: Gartner, 2013