A Radar study

TAKE OWNERSHIP OF YOUR DATA IN THE CLOUD

2020 Sweden

Commissioned by Zebware

radar. ECOSYSTEM SPECIALISTS

INDEX

INTRODUCTION

For most organizations take control over data comes with great challenges. Not only efficiency and value provisioning are at stake but also capital loss as well as risk of not conforming to changing legislations are among the challenges to balance as a decision maker.

Radar as the leading Nordic IT analytical company was commissioned by Zebware to conduct a study around different factors that will impact the ability to take ownership and control over data both in a strategic as well as operative way.

The research was conducted in Sweden and in the US during June and July of 2020. For Sweden the respondents were distributed by size in accordance to below:

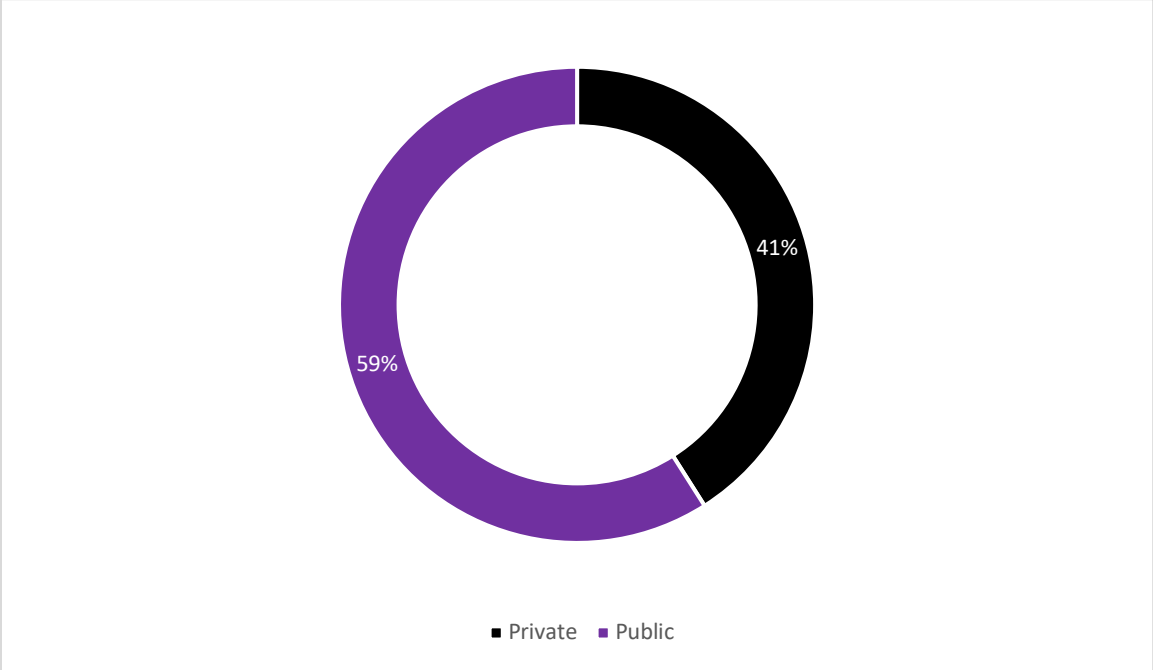
Sweden	
50-100 employees	14%
100-249 employees	19%
250-499 employees	21%
500-999 employees	13%
1000+ employees	33%

25 percent of the respondents represented public sector and 75 percent private sector.

I addition to the research Radar has also conducted in depth interviews with IT decision makers during the month of July.

1. CLOUD USAGE

The maturity and penetration of Cloud services is high in Sweden. Together with Finland the highest in the Nordic region. Spend in Cloud services in Sweden amount to 15,5 billion SEK in 2020. The split in penetration between private and public cloud was the following:



As IT departments focus shifts from building and supporting traditional IT environments to designing business enablers and revenue generating services, the requirements for agility and scalability increases. The movement increases complexity and can hamper the benefits which becomes evident by looking at penetration figures such as that 87 percent used cloud based SaaS, IaaS or PaaS with a 51 percent using cloud native solutions. A hybrid cloud design supports agility and scalability to cost and with hybrid cloud penetration on 24 percent there exist a clear potential for improvement which also is underlined in Radars other research were the largest increase comes in movement towards hybrid cloud solutions.

The use of Microsoft O365 is 86 percent in Sweden.

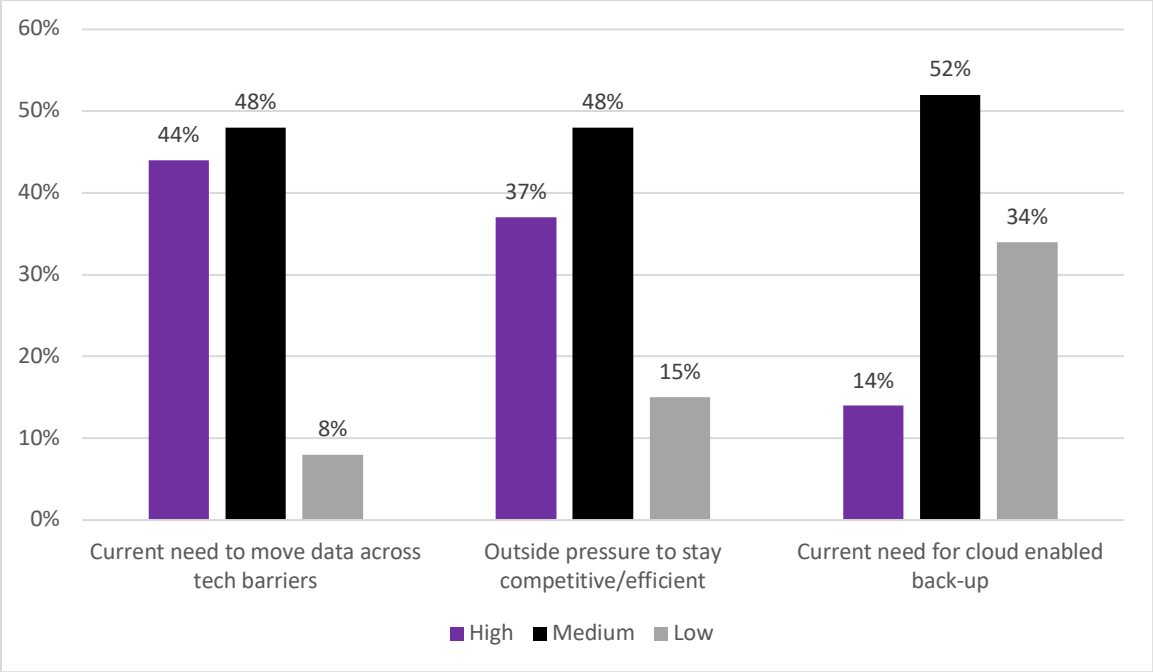
The local market shares by organizational penetration shows Microsoft to be the dominant choice in the country. Market shares by organizational penetration in Sweden:

- Microsoft 47%
- AWS 28%
- Google 8%
- Others 13%

2. CLOUD DRIVERS

The outside push and the industrialization of IT requires IT decision makers to embrace the cloud technology and solutions not just in order to drive cost down by scale of economies but also to access innovation. Radar insights around drivers for a more mature use of Cloud technology and services are that there are several clear beneficial properties that comes with a higher level of maturity in using cloud services, including efficient IT spending (cost) in general and the ability to respond to changes and new business needs. Viewed from an overall perspective, mature cloud organizations assess their own capacity to support core business needs significantly higher than the less mature in utilizing cloud. Organizations that are mature in the Cloud display significantly lower strategic debt than their peers, which positioning them far better to deliver business value rather than technology back to the organization. Their IT production model and usage of cloud services is a product of strategic alignment towards better business outcomes.

The drivers for Swedish organizations to invest in Cloud technology and services are driven primarily by the need to support a more efficient way of moving data across technology barriers. Drivers for Cloud investments:

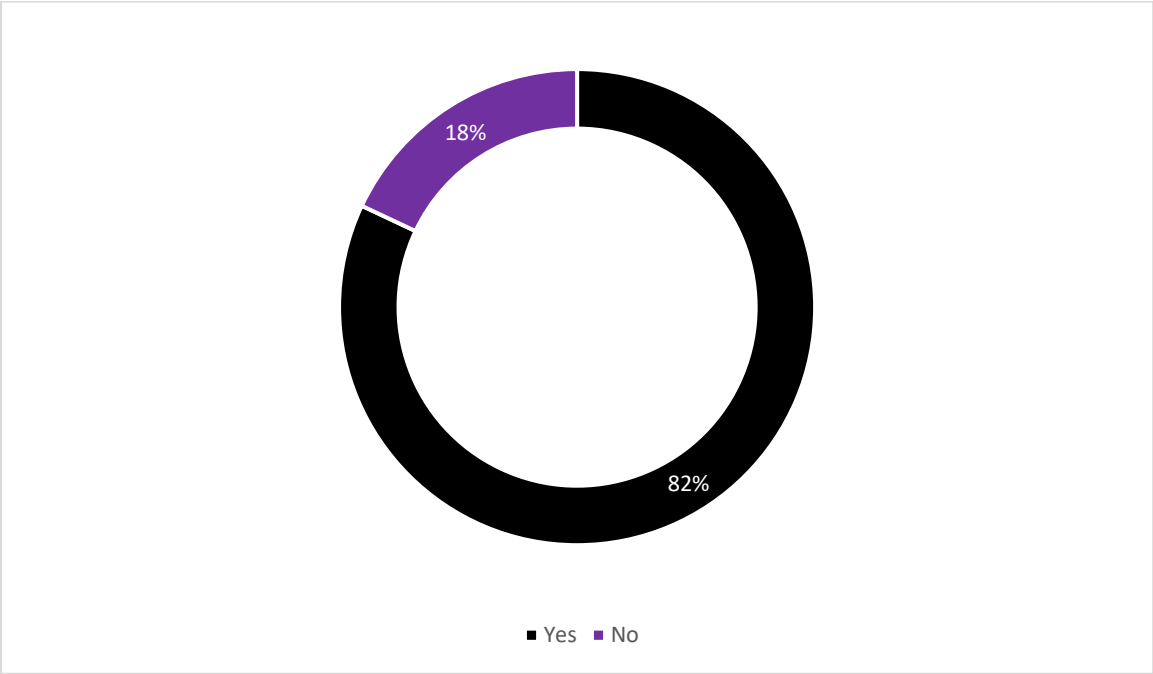


Business needs are the main driver for Cloud Investments and a strong correlation to the importance of an efficient data handling is evident.

3. DATA GOVERNANCE

Data governance is important in order to make sure that an organization works through a conformant plan to make its data available, usable, consistent and secure. One important part is also the use of data classification.

The use of data governance models in Swedish organizations:

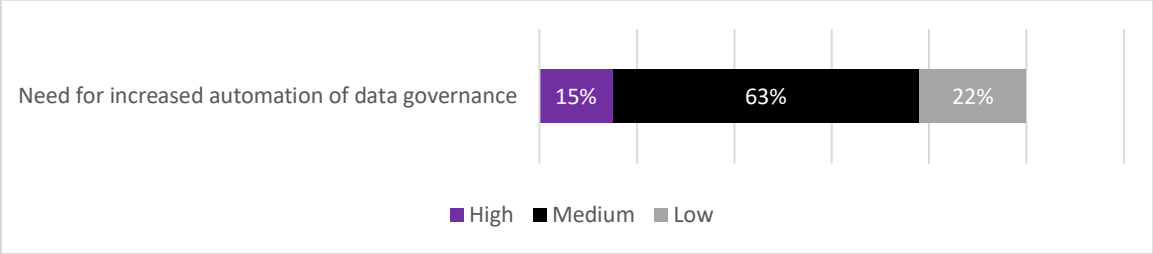


Further, 72 percent use a data classification model whilst 28 percent claims to do not. Out of those using a model for classification a dominant 89 percent uses an internally developed classification model.

The data classification model is used for:

Integrity purposes	94%
Security purposes	36%
Traceability purposes	34%
Availability purposes	16%
Accessibility purposes	14%

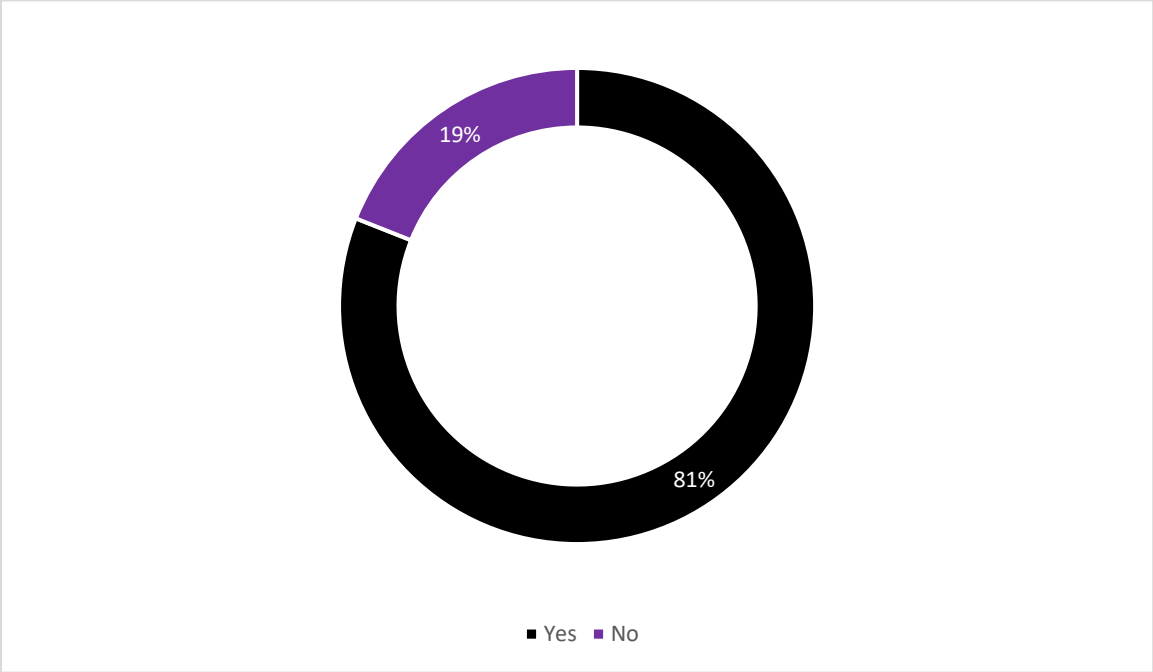
There is a medium rated need for increased automation within data governance. Although if benchmarked against the US requirements the need is more prioritized in Sweden.



4. SECURITY

The main inhibitor for increased or more efficient use of Cloud technologies and services are perceived to be security. The complexity with using externally produced services in conjunction with internally produced, the complexity in evaluating different cloud native solutions security levels and conformity to rapidly changing legislation and recommendations as well as the need to use data to empower your business makes security a prime concern today.

Swedish organizations perceive Cloud security to be a concern today.



These results differ very much if benchmarked against the US results where 21 percent perceive Cloud security to be a concern. One of the differences is being different legislations and Swedish/EU concerns of Cloud Act and another is a lower use of data classification models in the US which could imply an underestimation of the importance of IT security in the US at present.

Over 87 percent of the Swedish decision makers claim their organizations to be fully compliant to the present legislation. This also differs if benchmarked against US decision makers where the same estimation is 42 percent. One of the reasons behind this result can be the active GDPR work that has been performed and where data and security risks has been evaluated and handled according to law in Sweden.

5. CONCLUSION

The emphasis of data flows opens up a powerful contest to traditional business models by bringing digitization to the forefront of the enterprise, while challenging established ways of thinking about assets, asset exploitation, and value chains in the business. Cloud technologies and services are key technologies to drive digitalization in all industries and sectors. The complexity increases with a movement among decision makers towards hybrid cloud solutions.

Prime concern with Cloud is perceived to be security. Therefore security needs to be addressed using an efficient and for the purpose developed solution that can address the concerns without hampering the benefits of mastering the data in an organization.

Zebware offers an interesting Swedish solution that as far as Radar has evalauted is tailored against these needs. Please visit Zebware site for additional information www.zebware.com.

For questions around the report and the research please contact Radar www.radareco.se