



The Telecom Consultant Bulletin

Insights, Viewpoints & Facts
from Telecom's Influencer Community

Produced by [The Brookside Group](#)

October 2010

This Month's Theme: Consultants' Activity and Perceptions on Cloud Computing Services

Welcome!

This month's issue of The Telecom Consultant Bulletin moves away from consultant/vendor relationship issues and focuses on an evolving IT market solution trend, namely: Cloud Computing Services.



Every quarter, Brookside conducts a Telecom Consultant Insights Survey on new or emerging telecom/IT technologies, solutions or trends. The topic of our 4Q10 survey was the current level of consultants and their clients' Cloud Computing Services interests, challenges and activities. As with any embryonic market, the definition and range of cloud providers/offerings vary greatly, are evolving, and include software applications, discrete business services, developmental platforms, storage, managed services (such as security), infrastructures (i.e., datacenters), etc. Given this breadth of current cloud computing services, we based our survey on the following broad definition of Cloud Computing, as provided in a recent InfoWorld article:

"Cloud Computing is Internet-based computing that provides shared resources, software and information on a subscription-based or pay-per-use service (on demand) that, in real time, extends existing or provides new IT capabilities. Most cloud computing infrastructures consist of services delivered through common centers and built on servers."

Consultant insights and experiences with early adopter clients often help us to better understand how the market is evolving and where it is going (i.e., market drivers), including the most salient customer benefits and deployment challenges.

We hope these survey findings help shape your thinking and pursuit of cloud computing opportunities.

Sincerely,

Telecom Consultant Insights: Cloud Computing Services

Current Level of Consultants and Their Clients' Cloud Computing Services Interests, Challenges and Activities *(based on Brookside's Cloud Computing Services survey responses from 38 consultants)*

Summary of Key Findings

- Nearly 2/3 of responding consultants have or are consulting on cloud computing services solutions
- Application-as-a-service, Infrastructure-as-a-service, and Database-as-a-service currently lead cloud service interests among consultants' clients
- Cloud computing services consulting/interest is spread fairly evenly among enterprise and SMB clients (51% of consultants' cloud computing clients are enterprise and 49% are SMB)
- Cost cutting, CAPEX avoidance and expanded features are currently driving client interest in cloud services
- Migration, interoperability and security currently represent the greater challenges in the consideration/deployment of cloud services
- A crowded and growing field of cloud services providers will take some time to shake out, but consultants currently view Microsoft, Google and Amazon as the current and future leaders in cloud computing

To receive a more detailed and quantitative summary of key survey findings, you need to complete and submit the survey. Click [HERE](#) to go to the survey.

What Consultants Are Saying About Cloud Computing Services

Consultant Perceptions and Observations on Cloud Computing Services *(based on Brookside's Cloud Computing Services survey responses from 38 consultants)*

Sample of Consultant Open-Ended Comments

- *"A transformational IT management technology!"*
- *"Will change the IT infrastructure and organizational planning permanently"*
- *"Too many customers are looking at hosted as a solution or a technology. This model must be thought of as a financial model. SLAs and financial impacts must be considered."*
- *"No provider has begun to address, at least publicly, the stability issues - clouds can crash."*
- *"Cloud services will likely have a place, but subscription services over time prove costly."*
- *Cloud computing may be seen by enterprise clients as a bit of a stretch for telecom consultants."*

Consultants' Market Fact: Did You Know . . .

The Top Users of Telecom Consultants in the U.S., by Vertical Market, Are:

1. Government
2. Healthcare
3. Education
4. Financial services

Source: *The Brookside Group's 2009 State of the Telecom Consulting Market Study* - Click [HERE](#) to download an executive summary of this study

Market News, Resources & Events

- **Cypress Communications Virtualized Enterprise Webinar for Healthcare: Cloud Computing + Unified Communications - November 3, 2010** - Click [HERE](#) for more information and to register.
- **Brookside's Annual Market Study** - Next month, Brookside will be conducting its annual (2010) *State of the Telecom Consulting Market Study*. Be on the look-out for an email announcing and linking you to the study. Your participation will be greatly appreciated and you will receive a free summary of survey findings.
- **Consultant Program Membership Links** - Not a member of the following telecom vendor consultant programs? Click on the links of interest below to register for these informative and helpful programs.
 - [ADC Telecommunications Program for Architects, Consultants and Engineers](#) (PACE)
 - [Cypress Communications \(Hosted UC\) Consultant Program](#)
 - [Juniper Networks J-Partner Consultant Program](#)
 - [Qwest Communications Consultant Program](#)
 - [ShoreTel Consultant Program](#)
- **Consultant Program Directory** - Need Vendor Consultant Program contact information? Click [HERE](#) to access Brookside's Directory of Telecom Vendor Consultant Programs.

Questions, Comments, Suggestions?

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