The Changing Cloud Agenda
by Holger Kisker, Ph.D., April 24, 2012

KEY TAKEAWAYS

Cloud Computing Is Moving Beyond Being A Cost And Efficiency Play
Several years into the cloud journey now, companies are moving beyond the initial drivers for investments, which pertained to lower costs and greater operational efficiency. Companies are starting to see the broader benefits around business agility and speed, leading to investments in new cloud solutions that complement existing business processes.

B2B Collaboration Evolves As The Ultimate Value Driver For Cloud
As cloud computing moves beyond the sharing of IT resources it starts to open new opportunities around the sharing of data and B2B collaboration. While still at a very early stage, B2B collaboration can drive true business value around business innovation and therefore will frame the cloud agenda going forward.

New Business Models Leverage Cloud Collaboration
Cloud collaboration will form the basis for many new, innovative business models and ventures that will allow all participants to drive greater economic benefits.
The Changing Cloud Agenda
Cloud Computing Shifts From Cost To Innovation
by Holger Kisker, Ph.D.
with Pascal Matzke, Stefan Ried, Ph.D., Frank E. Gillett, Connie Moore, and Michael Yamnitsky

WHY READ THIS REPORT
Cloud computing continues to grow at a tremendous speed. But as the market and the understanding of cloud computing grows, the drivers and deployment scenarios that framed the initial cloud agenda are becoming increasingly irrelevant. Today companies expect benefits that go way beyond cost savings and efficiency and are starting to focus increasingly on cloud solutions that facilitate business innovation and growth. This report analyzes the changing value proposition and usage scenarios for cloud services and will help CIOs and other decision-makers understand what value contribution cloud computing is going to deliver in the future.
SOME COMMON MISCONCEPTIONS ABOUT THE CLOUD REVEALED

After a few years into the cloud journey, both vendors and buyers of cloud computing have come to realize that some of the common cloud computing myths that appeared to be critical to market growth were simply not true. As experience with delivering and subscribing to cloud computing solutions grows, cloud computing business drivers and adoption patterns are becoming clearer.

Companies Want More Than Just Lower Costs

Initial interest in cloud computing was mainly driven by straight financial considerations. By sharing resources with others and leveraging economies of scale, companies were seeking lower total cost of ownership for their IT resources. In addition, typical cloud subscription licensing models offer significantly lower upfront costs compared with traditional perpetual license models, turning high initial capital expenditures (capex) into longer-term operational expenditures (opex). But as firms gain experience from early cloud adoption, and as business imperatives change, cloud drivers have started to shift from cost to value.

- **Cost reduction through cloud is difficult.** Many cloud subscription models, e.g., for software-as-a-service (SaaS), have breakeven points between three and seven years, which means a perpetual license including maintenance would become cheaper compared with a SaaS subscription after that amount of time. Of course, such calculations depend a lot on additional factors such as existing infrastructure and internal staff, which can vary significantly from company to company.

- **Companies seek to improve operational agility and business flexibility.** Today, the booming adoption of cloud services remains unbroken because companies are mainly interested in business improvements with cloud solutions while cost considerations are playing a much less important role (see Figure 1). Today's No. 1 reason to improve business agility was only considered by 32% of enterprises Forrester surveyed in 2009 as a key benefit of SaaS (see Figure 2).1

Obviously, cost considerations will remain an important cloud adoption driver, other benefits such as implementation speed, improved business agility, and remote user support are becoming increasingly important. A solid business case for any cloud project today needs to address and quantify all these benefits in addition to the cost calculation based on the subscription license in order to drive a successful project.
Figure 1 Companies Look To Cloud Computing To Improve Agility And Speed

“How important were the following benefits in your firm’s decision to use SaaS?”
(4 or 5 on a scale of 1 [not at all a factor] to 5 [very important factor])

- Improved business agility: 72%
- Allows us to focus resources on more important projects: 66%
- Speed of implementation and deployment: 64%
- Faster delivery of new features and functions from SaaS/as-a-service providers: 60%
- Lower overall costs: 60%
- Ability to substitute upfront costs with regular monthly payments: 48%
- To support a large number of mobile and remote users: 48%
- Lack of in-house IT staff to maintain a traditional software solution: 47%
- Gaining a feature or functionality that is not available in a traditional, licensed software package: 42%
- Iterative deployment model supports a higher level of innovation within the business: 37%
- Having access to a wide ecosystem of solutions around the core SaaS application: 33%

Base: 920 software decision-makers at firms who are using or planning to use SaaS

Source: Forrester Research, Inc.
Large Enterprises Drive Cloud Adoption And Look For Complementary Value

Actual client adoption of cloud computing has also taken a very different route than initially expected. Benefits beyond reduced costs have shifted the focus that cloud deployments developed over the past two years:

- **Large enterprises dominate cloud adoption.** With the initial focus on cloud computing as a low-cost substitute for internal IT resources, this appeared to be a new business model that would mainly appeal to small and medium-size businesses (SMBs). However, a shift in implementation occurred as early as 2009, when SaaS adoption by large enterprises started to overtake SMB adoption of the cloud technology.²

- **Enterprises look to complement and not replace existing solutions through cloud.** Today, most companies are using SaaS solutions not to replace their existing on-premises installations but to complement these applications with new and innovative business processes. While 16% of the respondents in our Foressights Software Survey, Q4 2011, reported that they are planning to replace existing applications with SaaS over the next two years (9% had already implemented), 26% instead planned to complement existing solutions with SaaS (see Figure 3).³
**Figure 3** Companies Use SaaS Mainly To Complement, Not Replace Existing Solutions

The spreadsheet associated with this figure contains additional business application and sample size data.

The percentage of firms planning to complement or replace applications with software-as-a-service (SaaS) is as follows:

- Complement applications with SaaS: 14%
- Replace applications with SaaS: 12%
- Plan to complement most/all with SaaS within two years: 9%
- Already replaced most/all with SaaS: 7%

Base: Weighted average of responses by software decision-makers at firms with 20 or more employees who currently use or are planning to use a variety of business applications

Source: Forrsights Software Survey, Q4 2011

**CLOUD DEPLOYMENTS INCREASINGLY FOCUS ON BUSINESS PROCESS INNOVATION**

Many companies — especially in the more mature and industrialized IT markets in North America and Europe — have invested heavily into in-house IT solutions over a long period of time; companies need to further leverage and protect these investments. To rip out the old applications and servers and simply replace them with external cloud services usually does not create a good business case. To obtain business agility, companies would rather keep in-house solutions, streamline and consolidate them as best as possible, and then add new, innovative business processes with cloud services (see Figure 4):

- **Companies improve core business processes with new SaaS functionality.** Companies are complementing existing core human capital management (HCM) solutions such as payroll or benefits, with complementary SaaS solutions like talent management or eRecruiting. Instead of a traditional in-house implementation of new solutions for these processes, a cloud SaaS deployment is an interesting alternative to speed up business innovation and agility.

- **Companies are using cloud services for new, innovative technologies.** Technology is changing quickly, and staying up-to-date with the latest advancements is challenging for most companies. To overcome the need for specific in-house skills that are required to handle new technologies (such as predictive analytics), companies can subscribe to cloud services that offer these technologies, configured and operated by experts for the customer’s needs.
Companies subscribe to cloud services to improve business user satisfaction. Existing legacy systems, as well as older packaged solutions, are often efficient in the business process support for which they were designed. However, they lack what today’s end users expect in usability, self-service, or mobile device support. Instead of either replacing or re-architecting the end-to-end in-house solution, companies integrate cloud applications to reach existing (any many new) business users with web-native, multidevice front-end support.

**Figure 4** Cloud Drives Innovation Across The Business Cycle
B2B Collaboration Will Frame The Cloud Agenda

Clients are beginning to see the broader business agility and speed benefits of cloud; however, the biggest cloud value contribution goes beyond that, moving into business process innovation and business-to-business (B2B) collaboration (see Figure 5). Although we are still in the very early stages of exploring and exploiting this new opportunity, Forrester believes that this shift toward cloud-based B2B collaboration will frame the cloud agenda going forward.

When different companies use cloud solutions today they typically share the same IT resources, often from the same provider. However, when these different companies collaborate with each other around the same business processes, despite the fact that they share IT resources from the same cloud provider, the processes are usually not shared but remain confined within their traditional silos. Partners send data and objects (e.g., orders, shipment volumes) back and forth between each other, sometimes from one tenant to the other within the same cloud instance. Think of two sportsmen sitting in the same boat but rowing in opposite directions — they are sharing the boat (and no one has to drown), but they’re not getting anywhere. Companies need to leverage the fact that they are doing business in the same boat in order to move it and bring innovation through collaboration to their business processes.

Figure 5 Innovation And Collaboration Will Frame The Future Cloud Agenda

Changing cloud agenda

<table>
<thead>
<tr>
<th>Cost and scalability</th>
<th>Speed and agility</th>
<th>Innovation and collaboration</th>
</tr>
</thead>
<tbody>
<tr>
<td>2007</td>
<td>2010</td>
<td>2013</td>
</tr>
</tbody>
</table>

Source: Forrester Research, Inc.
CLOUD COMPUTING ENABLES DIFFERENT LEVELS OF B2B COLLABORATION

B2B collaboration has a long history including the support by different IT solutions from electronic data interchange (EDI) messaging to Internet marketplaces. When cloud computing came on the scene, firms saw mainly as a model for sharing IT resources, not business content. However, cloud computing offers a lot of possibilities for B2B collaboration on different levels (see Figure 6).

Figure 6 Cloud Computing Enables Different Levels Of B2B Collaboration
Data Collaboration Provides One Version Of The Truth For Business Partners

Business partners that are sharing information with each other can significantly reduce costs and improve the performance of their B2B processes. Data collaboration between two business partners can focus on different data types, including the following three scenarios:

1. **Master data collaboration ensures that business partners are speaking about the same things.** Master data represents the information backbone of any company including, e.g., customer, product, or asset records. Keeping master data accurate and up-to-date is important, but also challenging in the case of decentralized data silos. In B2B processes, the challenge is even bigger. To ensure that business partners are all speaking the same language, they need to talk about the same product, quantity, price, and delivery location.

   An example solution for shared master data is data.com from salesforce.com. The solution maintains more than 30 million complete, accurate, and up-to-date contact details that can be used for marketing activities or to clean a database.5

2. **Transactional data collaboration eliminates the need for reconciliation.** Companies produce a huge amount of transactional data every day, e.g., financial data changes with every accounting transaction and inventory data receives constant updates from production as well as inbound and outbound shipments. A lot of this transactional data originates from B2B processes where companies need to exchange financial or logistic information with each other. Typically, both parties keep their own records but send each other updates that are mapped and reconciled in case of deviations. Business partners that share transactional data are working on a single source of truth and do not need to compare and correct data between each other. This leads to significant time and money savings for both parties.6

   Existing solutions for highly dynamic transactional data come from companies such as SecureSheet, which offers a collaborative worksheet platform.7 Companies can take existing spreadsheets and turn them into a SaaS application by adding custom business rules and security to control how internal and external users interact with the online business spreadsheet. Different users only see what they are allowed to see (down to the sheet, row, column, and cell level). The solution can model an existing manual process, automate it, and more importantly, secure it so that different participants in the process can access the appropriate data quickly and accurately.

3. **Metadata collaboration improves business communication.** Metadata defines the business processes and related communication structures in a company. Sharing this information with others accelerates the business process integration effort by using predefined rules and mappings between business partners.

   An interesting example of existing metadata collaboration is offered by Dell's Boomi. The company offers a multitenant application integration platform. An important, though tedious,
step in configuring integrations is mapping data fields between applications. Through the multitenant architecture of Dell Boomi, the mapping pairs of all users can be mined for collaboration. The collaboration is packaged into a suggestion engine (Boomi Suggest) that mines all the previous mapping pairs (currently more than 2 million pairs) to suggest data mappings for new integrations. Users are averaging 68 suggested mappings, and 85% of the suggestions are accepted leading to much faster configuration of integrations.8

Document Collaboration Increases Efficiency In Cross-Company Working Environments

To collaborate on documents, companies are sharing files of unstructured data in a joint business process. This can be as basic as file sharing such as that offered by a company like Dropbox, or it can include workflow definition such as can be found in Microsoft SharePoint. Real SaaS applications for document sharing provide users with a collaborative document exchange platform with integrated workflow support through a pay-by-use cloud business model.

An example for document collaboration is Fabasoft’s Folio Cloud solution, a platform for secure intercompany document exchange.9 The solution offers a number of functions for the handling, managing, and sharing of documents both internally and between different companies including workflow, authentication, and access rights management. Folio Cloud also offers a development environment for functional extensions to fit individual needs. Versioning, auditing, border-transcending workflows, and records management ensure the fulfillment of compliance requirements.

Process Collaboration Accelerates Business Innovation

In the case of process collaboration, business partners are performing all business transactions within the same cloud solutions (compared with data or document collaboration, where the business transaction takes place in the on-premises applications and the input/output in the form of data/documents is stored in the cloud).

A good example of process collaboration is Logica’s cloud service License2Share (L2S).10 L2S brings together joint venture parties with disparate processes, data from various sources, and applications into a single collaboration platform to manage their operations in the North Sea upstream business. The solution is based on an industry initiative and today streamlines operations between 650 joint venture partners by enabling secure sharing of predefined information from enterprise systems. Collaboration does not jeopardize competition but actually streamlines work processes, making them more effective and reducing information risks and costs. L2S facilitates the information sharing inside each joint venture operating on the Norwegian Continental Shelf and simplifies the process for companies deciding to join or leave a joint venture.
INTRODUCING THE CLOUD COLLABORATION TAXONOMY

Because the cloud market is not homogenous, cloud service vendors and users need to understand the different facets of cloud computing to drive their related strategies to success. As described in Forrester’s cloud taxonomy, the cloud computing market consists of 12 distinct markets, described by four different IT resources that can be shared (infrastructure, middleware, applications, and people-centric business processes) and three different levels with which the resources are shared.11 Using the same logic and structure for the different markets of collaborative cloud solutions, we arrive at a new cloud market taxonomy defining nine distinct collaborative cloud segments along two different dimensions (see Figure 7):

1. **Horizontal: What information or business element is shared.** This dimension shows the level and strength of collaboration, from data collaboration (which includes master, transactional, and metadata) to document collaboration (shared, unstructured data files, and business objects) and process collaboration (shared workflow and business transaction).

2. **Vertical: With whom does the collaboration take place.** Increased levels of sharing start with a single company via a private cloud service, proceed to a defined and trusted number of companies (community), and finally move up to the open and public crowd.

Segmenting the market within these two dimensions creates a three-by-three cloud collaboration taxonomy that defines nine distinct cloud computing markets focused on innovation and efficiency improvements via business collaboration.

*Figure 7* Forrester’s Cloud Collaboration Taxonomy

<table>
<thead>
<tr>
<th>Level of sharing</th>
<th>Public cloud at global provider</th>
<th>Virtual private cloud at dedicated provider</th>
<th>Private cloud at in-house data center</th>
</tr>
</thead>
<tbody>
<tr>
<td>Level of collaboration</td>
<td>Public data sharing (data.com)</td>
<td>Community data sharing (SecureSheet) (Boomi Suggest)</td>
<td>Data warehouse, MDM</td>
</tr>
<tr>
<td></td>
<td>Public file sharing (Dropbox)</td>
<td>Community document sharing (Folio Cloud)</td>
<td>Office tools, ECM</td>
</tr>
<tr>
<td></td>
<td>Consumer marketplaces, social business networks</td>
<td>B2B marketplaces, process community (License2Share)</td>
<td>Workflow, BPM</td>
</tr>
<tr>
<td></td>
<td>Social cloud collaboration in open networks</td>
<td>Community cloud collaboration between business partners</td>
<td>Corporate cloud collaboration between employees</td>
</tr>
</tbody>
</table>

Source: Forrester Research, Inc.
Collaboration In The Corporate, Private Cloud Drives Consistency And Efficiency

IT always had the role of insuring data and process consistency within the firewalls of a company. However, with increasing business complexity, single, monolithic IT solutions were no longer capable of supporting the business’ needs. Over time, the IT landscapes of many organizations have become complex with several databases and (too) many different applications. As a result, data and process consistency is a challenge that now requires dedicated solutions to help reduce complexity and drive data collaboration. Examples include:

- **Data warehouses that act as central data hubs for corporate reporting.** Data warehouse solutions are designed for efficient data collection from multiple sources, data aggregation and fast data processing, analysis, and reporting, based on one consistent data mart across the enterprise.

- **MDM solutions insure data consistency across multiple data systems.** If master data is spread across multiple sources, MDM solutions help to clean redundancies and synchronize consistent data definitions. This insures that employees are working on the same, high quality data across the enterprise.

Meanwhile, tools for efficient document collaboration within companies include the following solutions:

- **Office tools used to create, change, and share business documents between employees.** Whether it is text documents or graphics, office tools allow employees to collaborate and exchange business documents with each other.

- **Enterprise content management (ECM) solutions to keep track of unstructured data files.** ECM solutions ensure versioning to keep employees working on a consistent portfolio of business documents.

Tools for efficient process collaboration within companies include the following solutions:

- **Workflow solutions to facilitate process consistency within companies.** Workflow tools provide support for different process stakeholders by defining and enforcing best practice business processes across all employees.

- **Business process management (BPM) solutions.** In addition to workflow tools, BPM solutions typically provide advanced process modeling and monitoring capabilities for business process analysis and optimization.

**Community Clouds Improve Business Innovation In B2B Business Collaboration**

Community clouds are built to facilitate B2B collaboration between business partners in a secure environment and for a well-defined number of companies. Companies that are doing business in community clouds know exactly which companies are sharing the same cloud services. Community
clouds are typically built around specific B2B processes, and companies join the community to either improve the efficiency of these processes with their business partner(s) and/or get access to new, additional business partners that are members of the community cloud.

- **Community clouds provide collaboration on all levels.** Similar to private clouds at the corporate level, community clouds offer solutions and services for data collaboration between business partners, document exchange, or a complete business platform where joint processes are defined and executed in a collaborative environment (e.g., License2Share for North Sea joint venture partners).

- **Community clouds are usually designed and built by community members.** Community clouds are often initiated by the respective B2B partners that see the need and advantage for a more collaborative business environment. Members are working together with a trusted IT partner to jointly develop the solution to meet their needs. If the solution was developed by a third-party IT company on its own, the service provider needs to have an excellent understanding of the business process in order to be accepted by an industry community as an operator for business critical processes.

- **Community clouds are typically managed by third-party operators.** Although communities are often initiated by the respective B2B business partners, most of the time it is an independent third-party company that actually offers the collaboration services and operates the community platform. Users of such community environments usually don’t want any of the individual members to be the operator, thus giving that member some control over their business. On the other hand, neither of the members is typically an IT company and is usually not interested in operating the IT solution on behalf of the entire community. As such, the operation is either handed over to the involved IT partner that helped build the solution, or members spin off a separate legal entity to operate the solution on behalf of all the funding members.

- **B2B marketplaces are good examples of existing community platforms.** Most B2B marketplaces today focus on the sourcing process between suppliers and buyers of spare parts, equipment, or other products and services. Several of these procurement marketplaces date back to the time of the Internet boom in the early 2000s. Although no one was talking then about cloud computing, many B2B marketplaces actually fulfill the criteria of cloud services (standardized IT resources via the Internet in a pay-by-use, self-service business model) and are good examples of collaborative cloud computing solutions.

### Social Clouds Enable Collaboration In Open, Public Networks

Because public cloud services users don’t know who they are sharing the cloud service with, they typically don’t have full control over who they share data, documents, or processes. Such collaborative, public environments, are commonly used by consumers for private purposes: to connect with friends and exchange, e.g., contact details (e.g., via LinkedIn), share documents like holiday pictures (e.g., using Flickr), or to plan a party (e.g., via Facebook). Public cloud vendors
in the B2B market don’t usually offer any collaboration features between their customers; quite the opposite, these cloud providers are putting a lot of energy into separating their individual clients into siloed tenants for security and privacy reasons. However, public clouds also offer tremendous opportunities for business collaboration:

- **Social clouds provide high value for consumer-facing businesses.** For consumer-facing businesses, e.g., in consumer packaged goods (CPG), social clouds are an excellent platform to collect information and engage with their target market. Because individual participants in social clouds are sharing a lot of information with each other, a member company can get access to this data and analyze it for market insights. MicroStrategy, for example, offers a solution named MicroStrategy Wisdom that analyzes Facebook and provides consumer insights to target segments with personalized content, special offers, and recommendations based on who individual customers are, where they come from, and what they like.12

- **Public cloud providers need to offer social and community cloud solutions.** When opening up their tenants to allow for data, document, or process sharing between their customers, public cloud providers need to think of new, flexible security concepts. While some use cases will require collaboration between all their users (or at least all that are interested in the new feature), there will be other use cases where customers will want to collaborate with named business partners only, thus turning the solution into a community cloud for the respective peers.

### Recommendations

**Cloud Users and Providers Need to Adjust Their Cloud Strategies**

With growing market adoption and understanding of cloud computing benefits, expectations by cloud users and requirements of cloud service providers are changing dramatically. Both sides need to understand the dynamics of the changing cloud agenda and adjust their cloud strategies accordingly.

- **CIOs need to build their cloud strategy based on business agility and innovation.** While cost considerations remain to be an important element of any cloud business plan, CIOs need to build their strategy around existing assets and complement these assets with new, innovative business functions from cloud service providers that can be quickly implemented to increase business agility.

- **CIOs should discuss collaborative cloud opportunities with their peers.** Together with their business partners, CIOs should identify B2B processes that could benefit from cloud collaboration services and build an ecosystem of industry and IT partners that are able to build and operate such a collaborative business platform.
- **CIOs should challenge cloud providers to go beyond isolated multitenant architectures.** While data security and privacy remains an important topic for cloud services, new security concepts will allow companies to better communicate and collaborate with each other across isolated tenants.

- **Cloud service providers should modularize their cloud service portfolios.** With cloud users looking mainly to complement existing IT investments with cloud service capabilities, cloud providers need to offer a flexible portfolio to enable pointed innovation instead of an all-or-nothing solution that overlaps significantly with their clients’ existing on-premises solutions.

- **Cloud service providers need to identify collaboration opportunities in their portfolio.** Cloud vendors should review their existing solutions and identify data, documents, and business processes that their users might be interested in sharing with each other.

- **Cloud service providers need to investigate and invest in new security concepts.** Cloud vendors need to stay on top of new security concepts and introduce new security layers in their solutions to support cross-tenant collaboration for processes, business objects, and individual data elements.

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**SUPPLEMENTAL MATERIAL**

**Methodology**

Forrester’s Forrsights Software Survey, Q4 2011, was fielded to 2,438 IT executives and technology decision-makers located in Canada, France, Germany, the UK, and the US from small and medium-size business (SMB) and enterprise companies with two or more employees. This survey is part of Forrester’s Forrsights for Business Technology and was fielded during November 2011 and December 2011. LinkedIn Research Network fielded this survey online on behalf of Forrester. We have provided exact sample sizes in this report on a question-by-question basis.

Each calendar year, Forrester’s Forrsights for Business Technology fields business-to-business technology studies in 17 countries spanning North America, Latin America, Latin America, Europe, and developed and emerging Asia. For quality control, we carefully screen respondents according to job title and function. Forrester’s Forrsights for Business Technology ensures that the final survey population contains only those with significant involvement in the planning, funding, and purchasing of IT products and services. Additionally, we set quotas for company size (number of employees) and industry as a means of controlling the data distribution and establishing alignment with IT spend calculated by Forrester analysts. Forrsights uses only superior data sources and advanced data-cleaning techniques to ensure the highest data quality.
We have illustrated only a portion of survey results in this document. To inquire about receiving full data results for an additional fee, please contact Forrsights@forrester.com or your Forrester account manager.

**Companies Interviewed For This Report**

- Applango
- Atos
- Avangate
- Capgemini
- Cisco Systems
- CSC
- CSS
- Dell
- Fabasoft
- Fujitsu
- Host Analytics
- IBM
- Infosys
- Logica
- Microsoft
- Mvine
- RightScale
- salesforce.com
- SAP
- SecureSheet Technologies
- Softronic
- Symantec
- Syntel
- T-Systems
- Wipro

**ENDNOTES**


2. For more details on cloud adoption trends between SMBs and large enterprises, see the February 12, 2010, “The State Of SMB Software And Emerging Trends: 2010” report.


4. An example of advanced IT technology offered as a cloud service is IBM’s SPSS SaaS solution for predictive analytics. IBM offers this service in the form of a typical SaaS subscription application, a managed service provider (MSP) solution for clients that want to own the software, or in the form of an outsourced project consultation. Source: IBM SPSS Services (http://www-01.ibm.com/software/analytics/spss/services/online.html).

5. For more information about salesforce.com’s data.com solution, please visit its public web pages. Source: salesforce.com (http://www.salesforce.com/data/whatisdata/).
6 Another interesting example of transactional data collaboration was discussed in the early 2000s during the rise of Internet marketplaces. At the time, the North American oil industry considered a collaborative inventory hub for all major industry players in the country. With more than a hundred million downstream movements by pipeline, rail, and trucks, the industry spends millions of dollars for the reconciliation of mismatched shipping numbers between business partners. A central inventory hub would have streamlined the whole process but was not implemented at the time, due to technical and funding challenges and a much lower acceptance of the idea of sharing information outside the company — things that might change now given the rise of cloud computing.

7 For more information about SecureSheet’s collaborative spreadsheet solution, please visit its public web pages. Source: SecureSheet Technologies (www.securesheet.com).


9 For more information about Fabasoft’s Folio Cloud solution, please visit its respective web pages. Source: Folio Cloud (http://www.foliocloud.com).

10 More information on License2Share (L2S), a solution offered by Logica together with its partners EPIM (E&P Information Management Association) and OpenText, can be found on the L2S web page. Source: (http://www.license2share.com).

11 For more details on Forrester’s cloud computing taxonomy, see the July 6, 2010, “The Evolution Of Cloud Computing Markets” report.

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CAROL ITO, client persona representing CIOs