

The Next Wave of Enterprise IT Transformation

Focus on Optimization

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CIO Viewpoints from Türkiye

Challenges & Priorities Ahead



Enterprise IT Transformation

The New IT Reality



Summary & Guidance

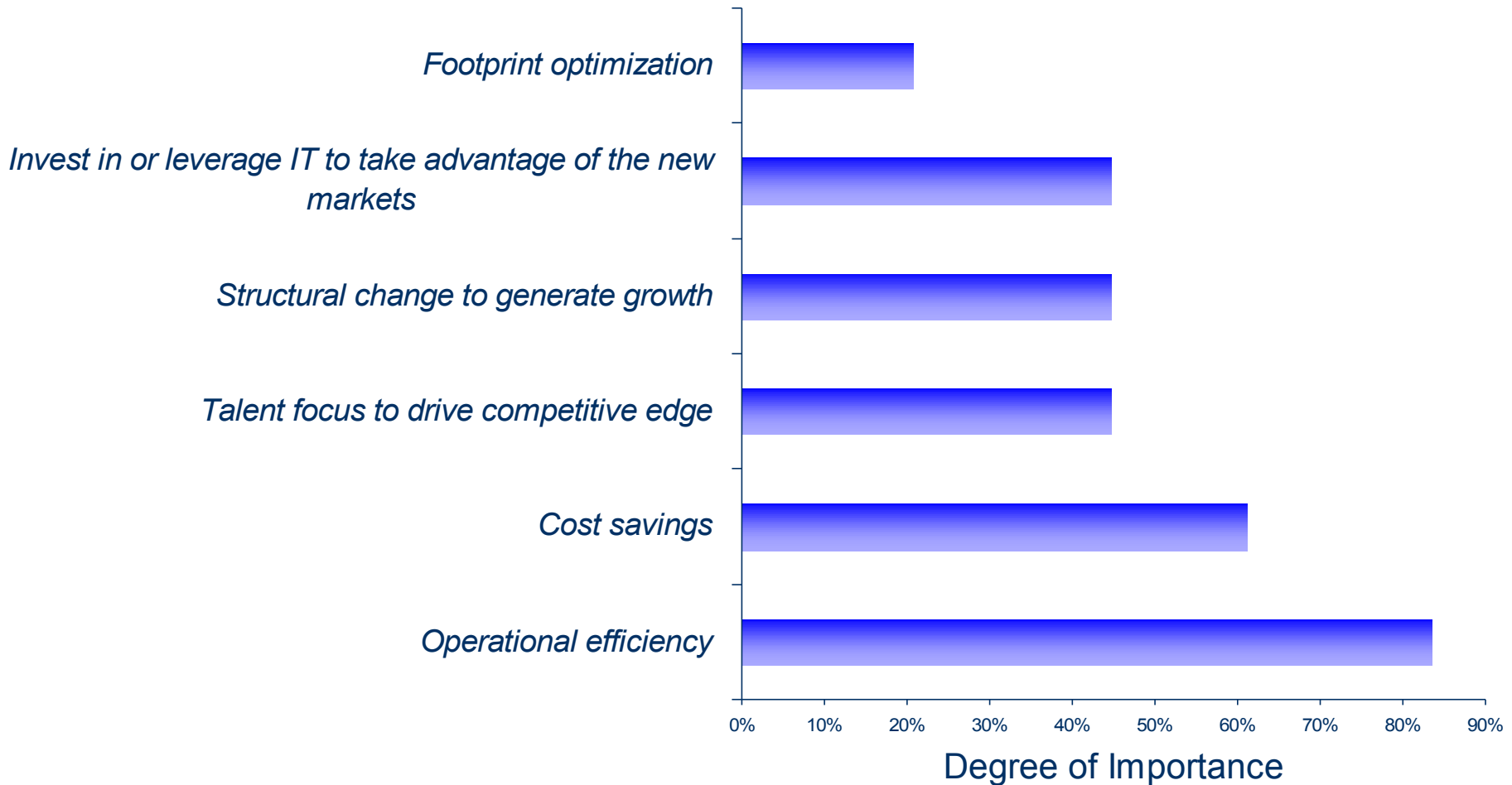
Implications for the CIO



CIO Viewpoints from Türkiye

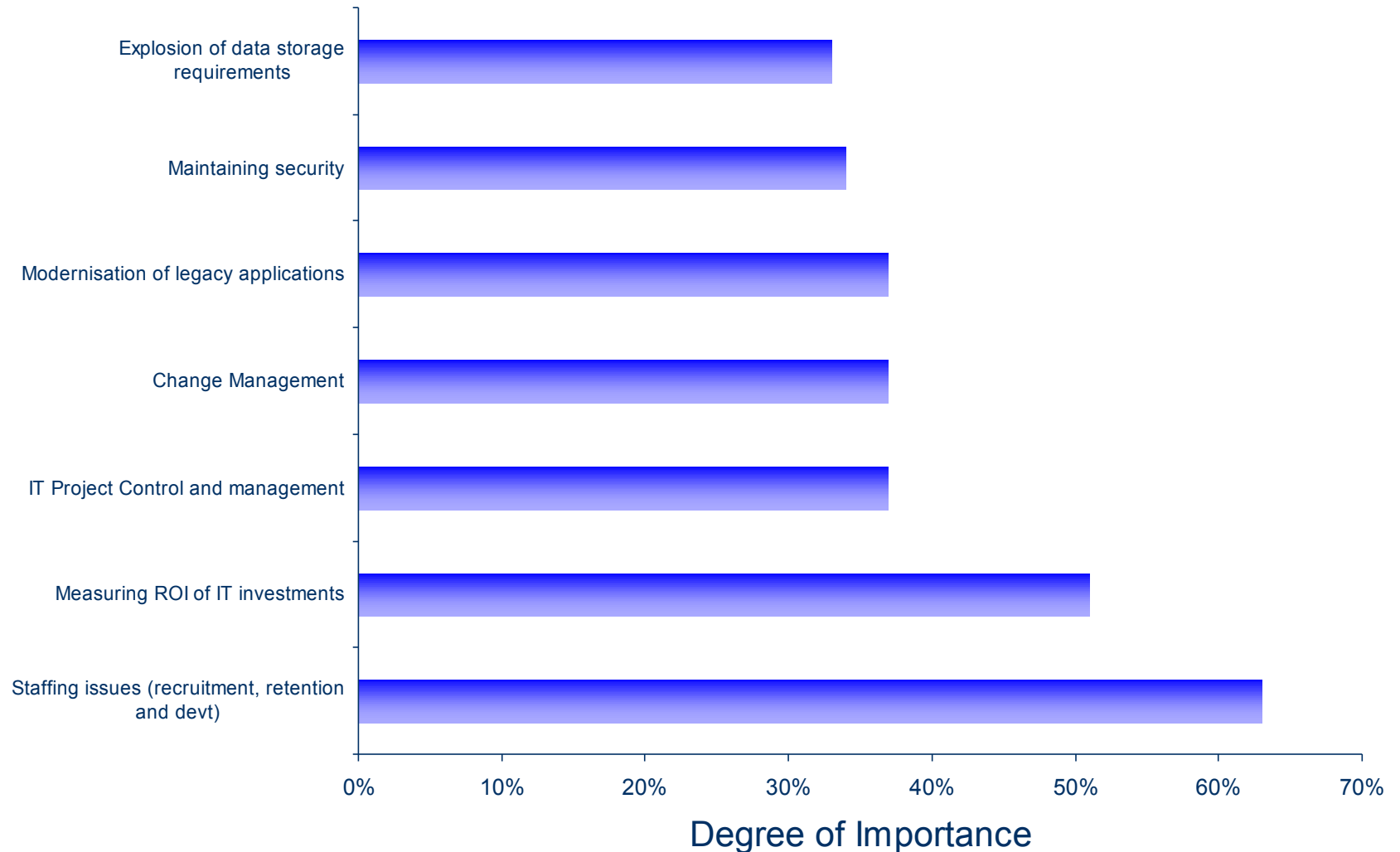
Focus on the “Efficient Enterprise”

Q. Looking out over the next 12 months, what do you think will be your organization's top strategic initiatives? (multiple responses)



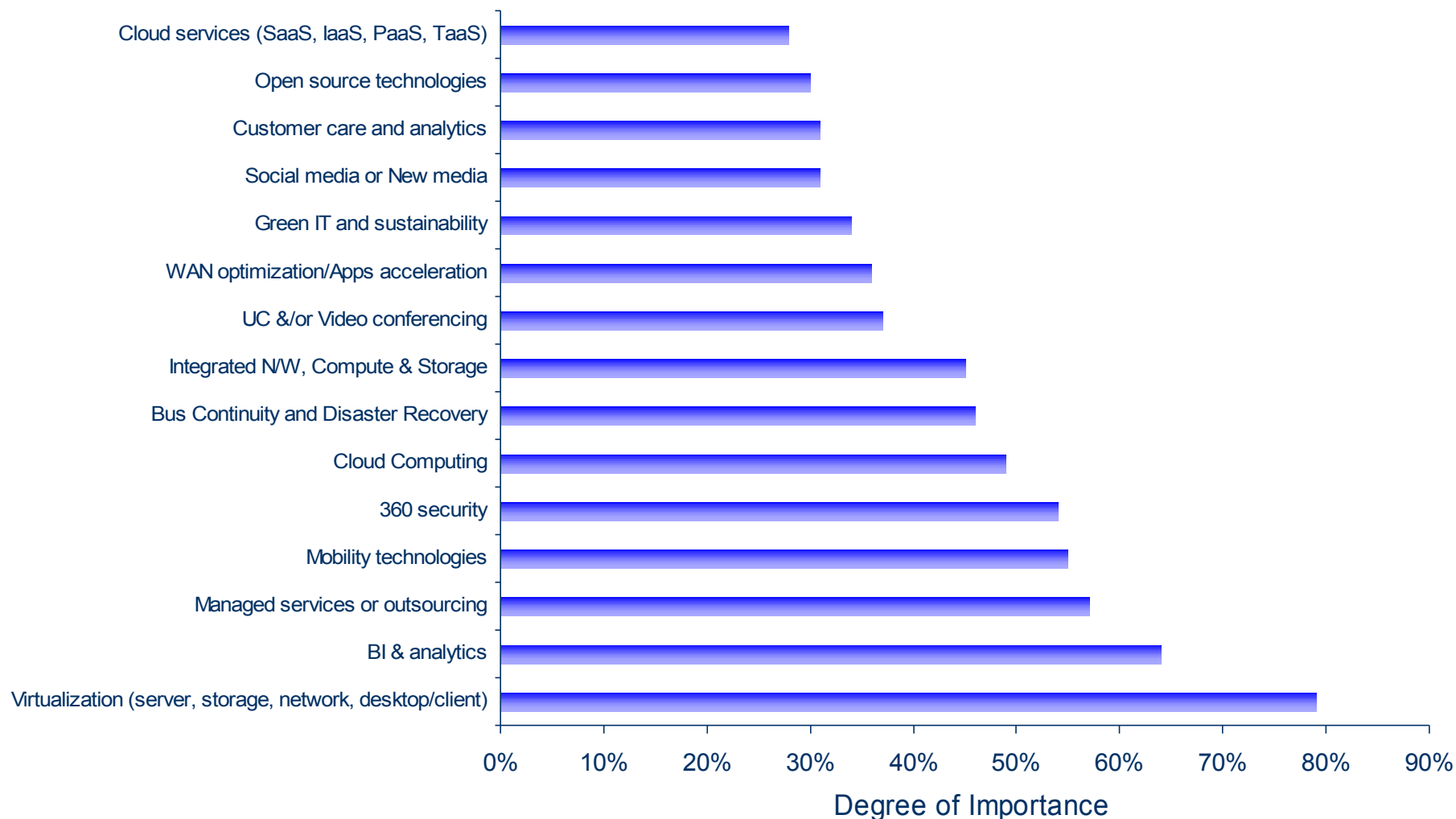
IT Management Complexities Increasing

Q. What are the biggest challenges you face as a CIO today? (Multiple responses)



IT Optimization & Business Agility Driving Technology Investments

Q. Which of the following technologies are you scoping for projects in 2011?



Evolving CIO Priorities

Efficiency

- Consolidation
- Standardization
- Optimization

Liquidity Management

- Business Alignment
- Role of the CFO
- CAPEX to OPEX

ROI-led Transformation

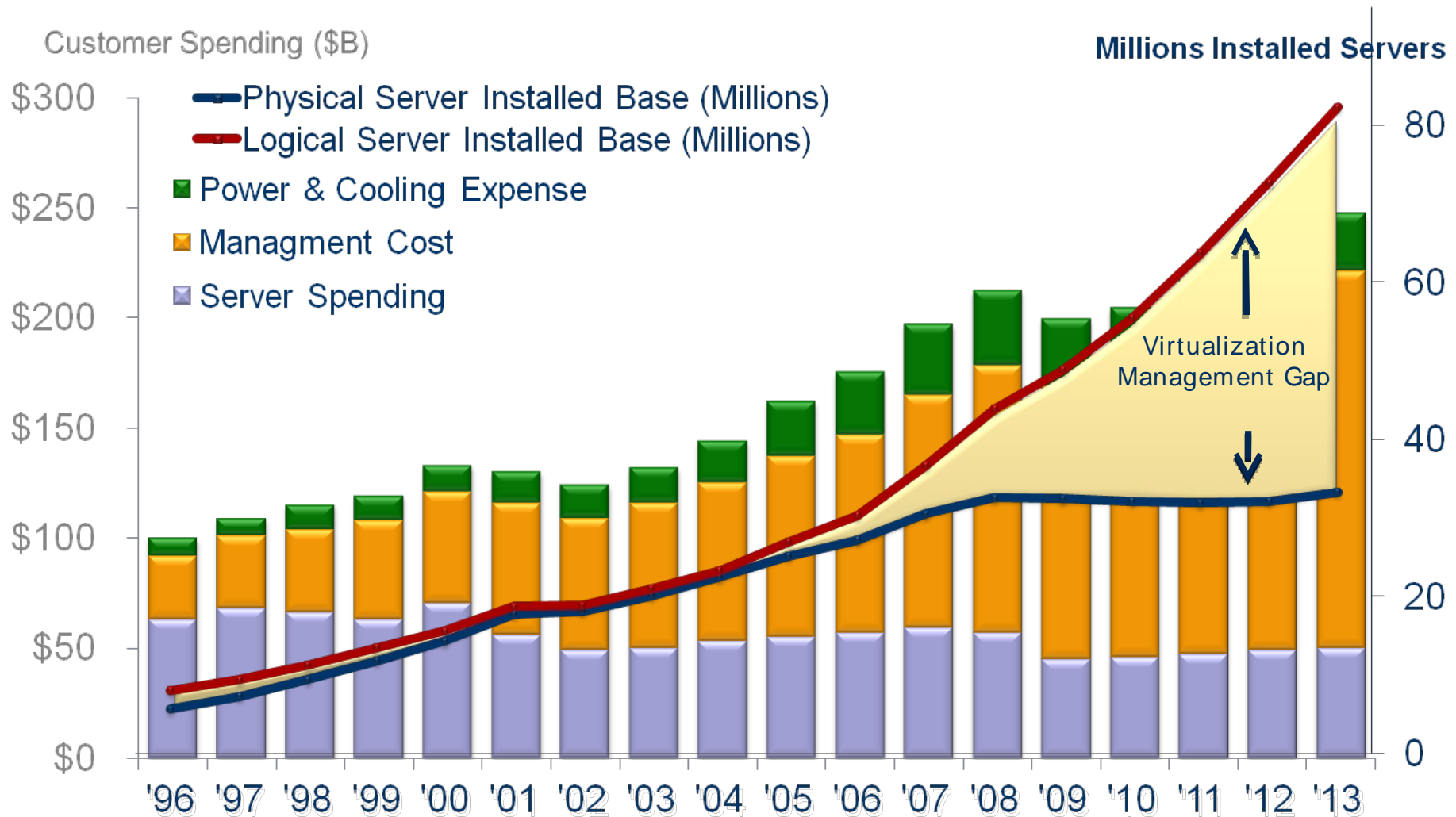
- Innovation
- Time to Value
- Intelligence



The Datacenter Optimization Drive

Virtualization - A Game Changer for Datacenter Efficiency

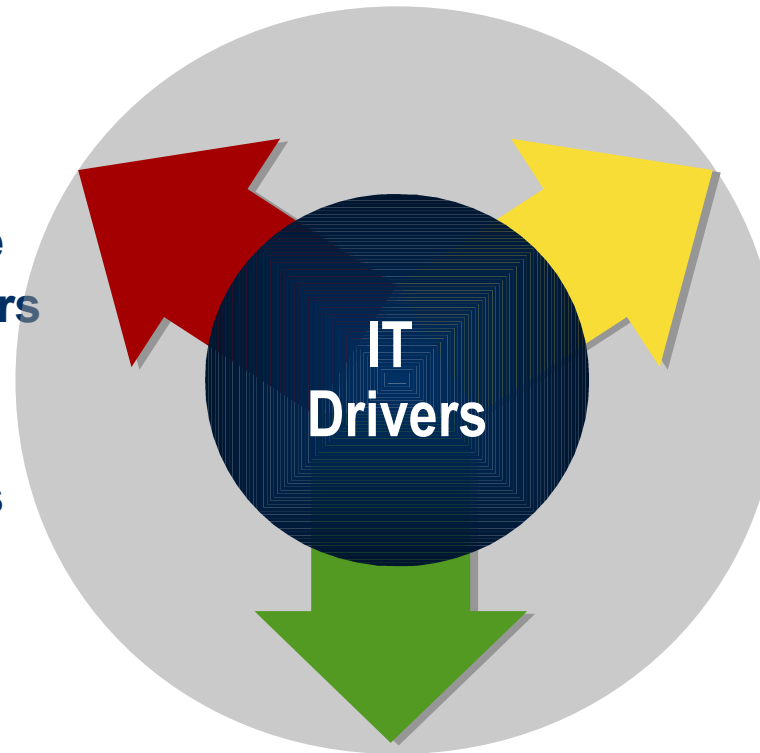
WW Spending on Servers, Power and Cooling, and Management/Administration



Virtualization's IT Optimization Goals

Availability

- Faster response
- Integrated response
- Number of customers
- Number of users
- Application value
- Resilient operations



Cost Reduction

- Staff utilization
- Asset utilization
- Lower Power & Cooling
- Lower CAPEX/OPEX
- Predictable ROI
- Reduce TCO

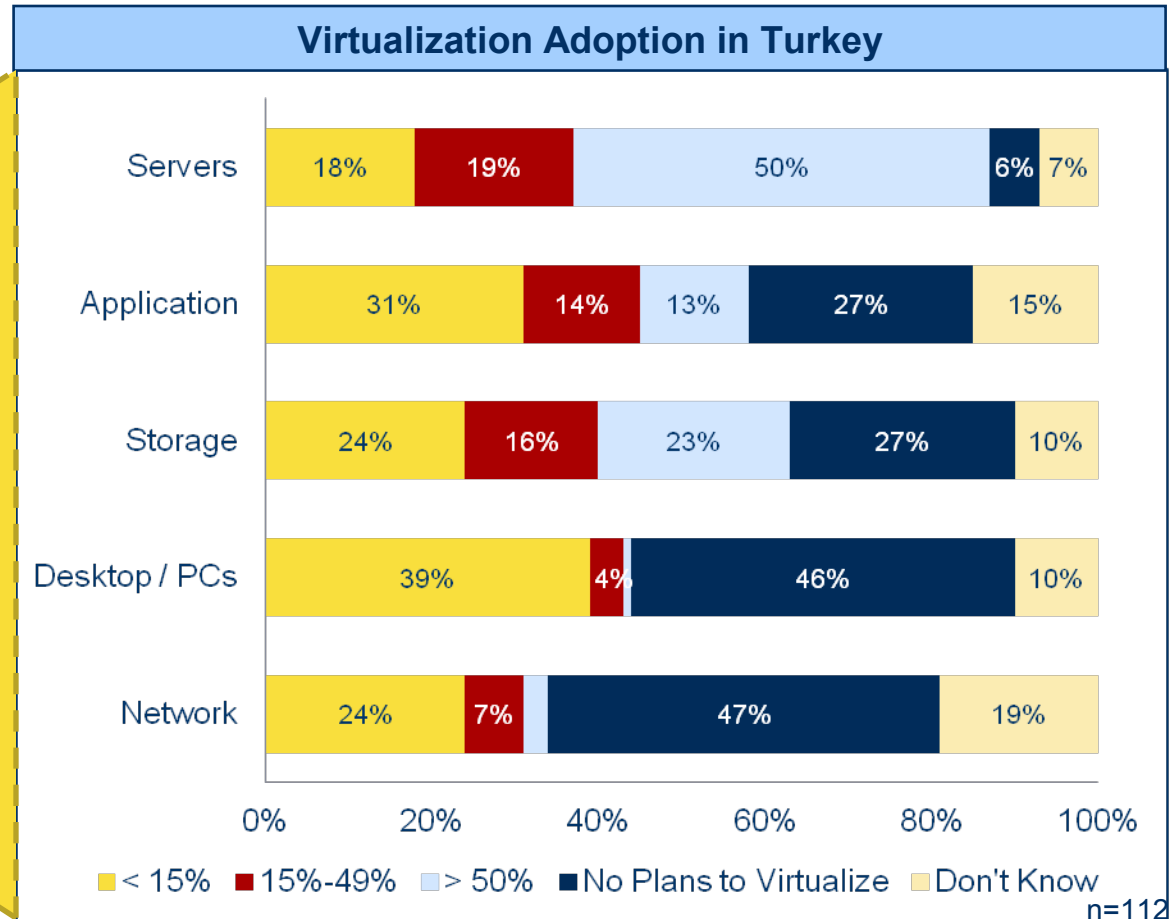
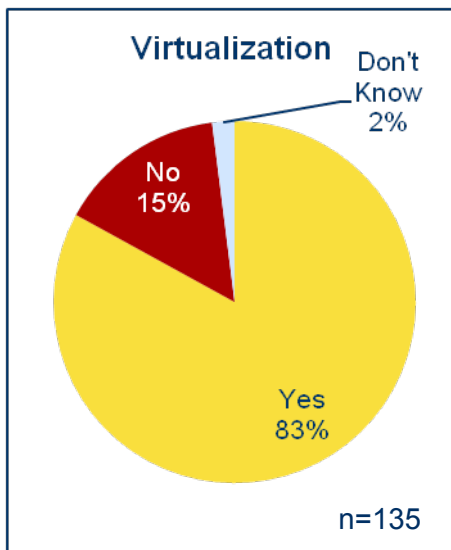
Business Flexibility/Responsiveness

- Flexible business models
- Competitive operations
- Improve Availability/DR
- Barriers to competition
- Simplify management
- Reduce deployment time

Virtualization Adoption by Technology in Türkiye

Q: Have you deployed any form of virtualization?

Q: If yes, please outline your current approach to virtualization is for each of the following:



Virtualization Adoption Reaching Tipping Point

A hand is visible on the left side of the slide, pointing its index finger towards the main text.

79% Scoping Virtualization
Projects in 2011

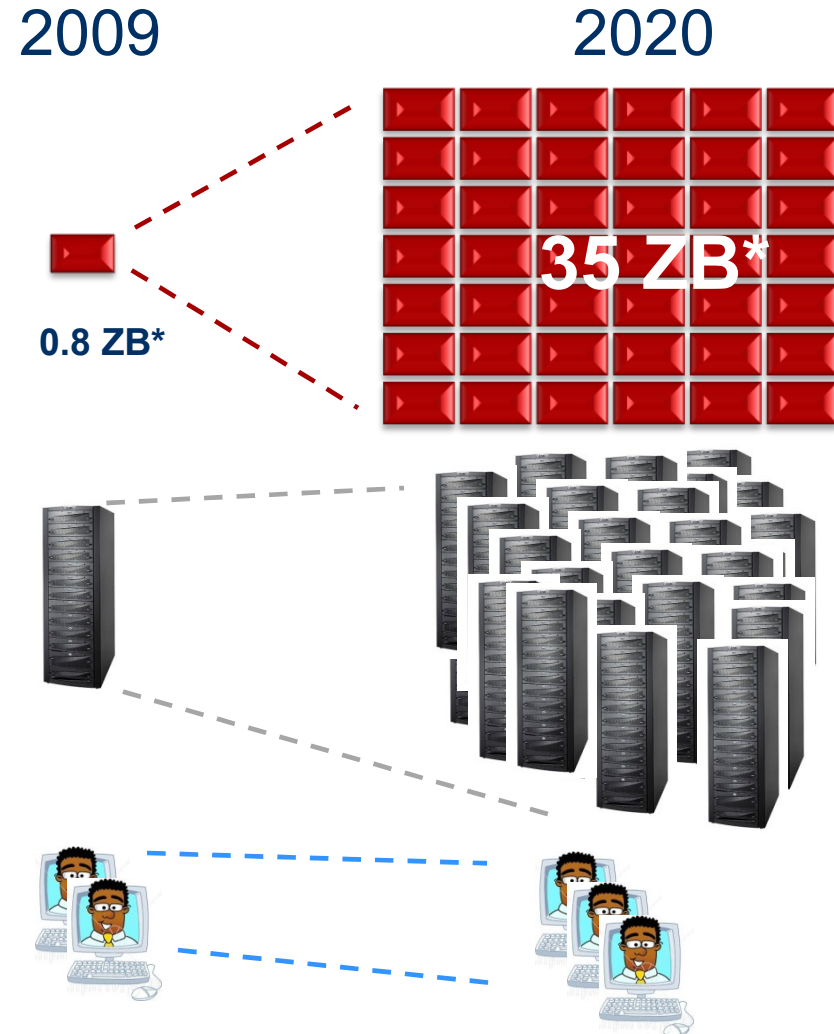
- CAPEX reduction, operational efficiencies & expanding capacity needs – key drivers
- Client virtualization likely to see more demand
- Integrated management of virtual & physical environments needed to address virtual server sprawls, security, & storage challenges



Managing Enterprise Data Explosion

Data Growing Unabated

- Information will grow by factor of 44 from 2009 to 2020
- Storage capacity will grow by factor 30
- Staffing will grow factor 1.4



*Zettabyte = 1 trillion gigabytes

Sources of Data Growth: *Living in an Ever More Connected World*

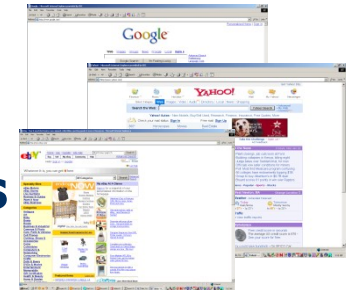
Office Apps



Enterprise Apps



Web Apps



Digital security

Connected media

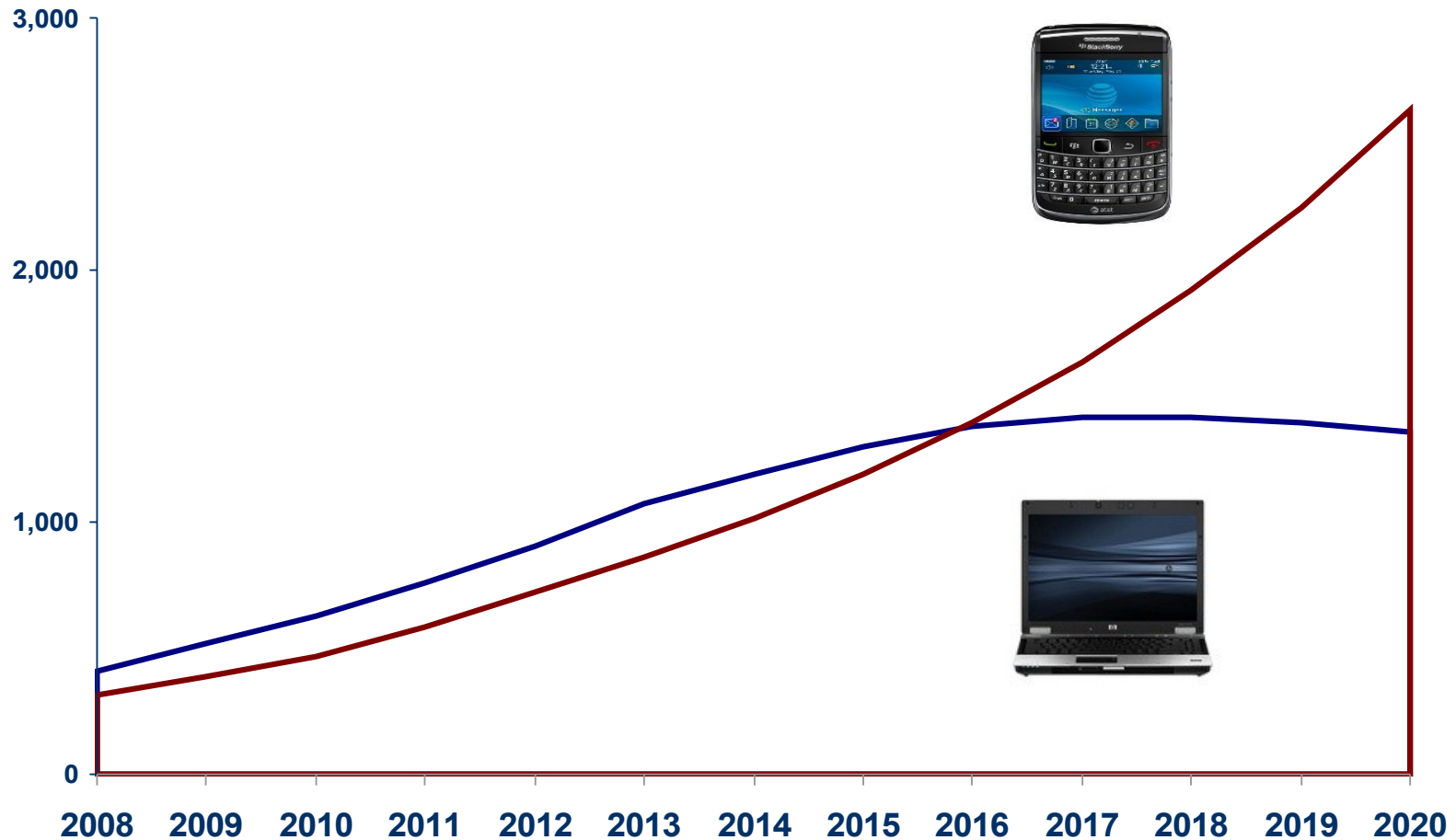


Web based community

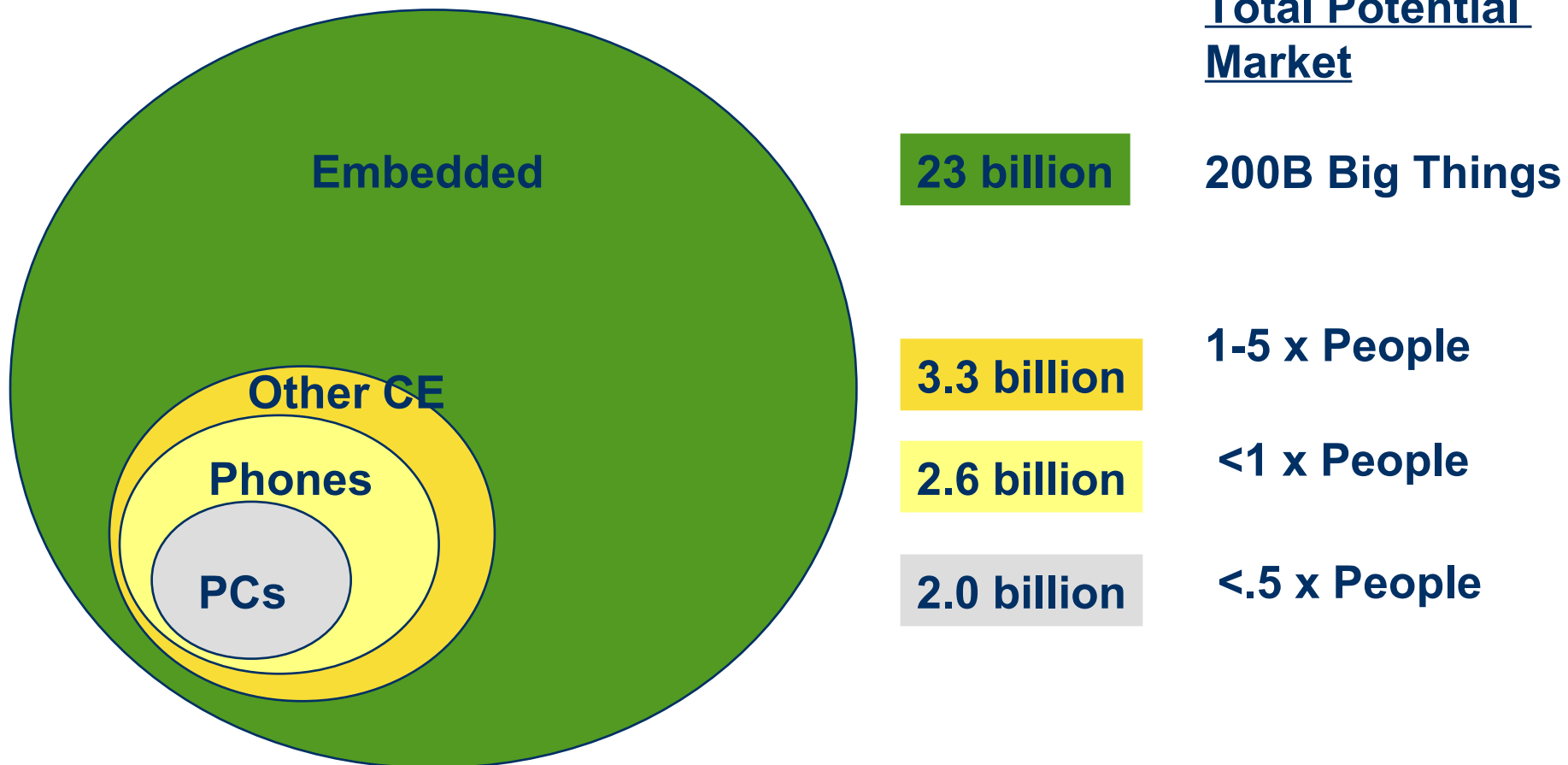


SaaS

Laptops and Smart Phones in Use Worldwide (M)



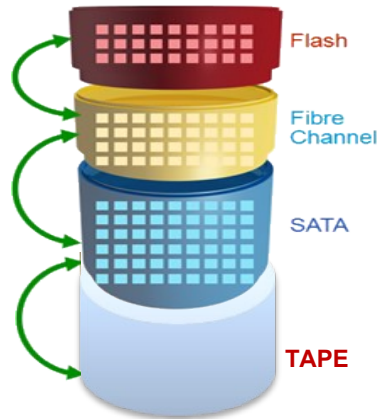
Billions of Connected Devices, 2020



Optimizing Data Storage

I: Intelligent Storage Tiers

Automated data movement between tiers of storage



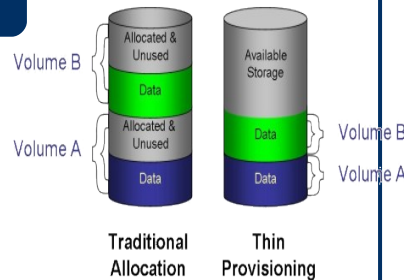
II: Resource Pooling

Virtualization

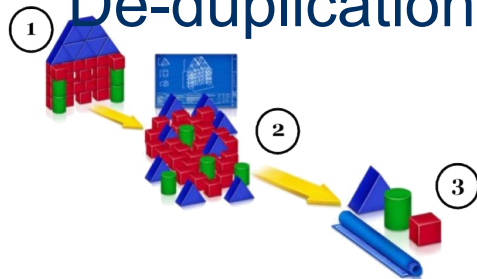
D.C. Density

III: Storage Optimization

Thin Provisioning



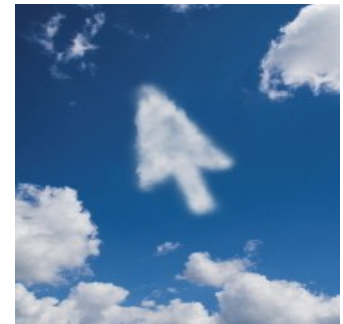
De-duplication



IV: Outsourcing

Cloud

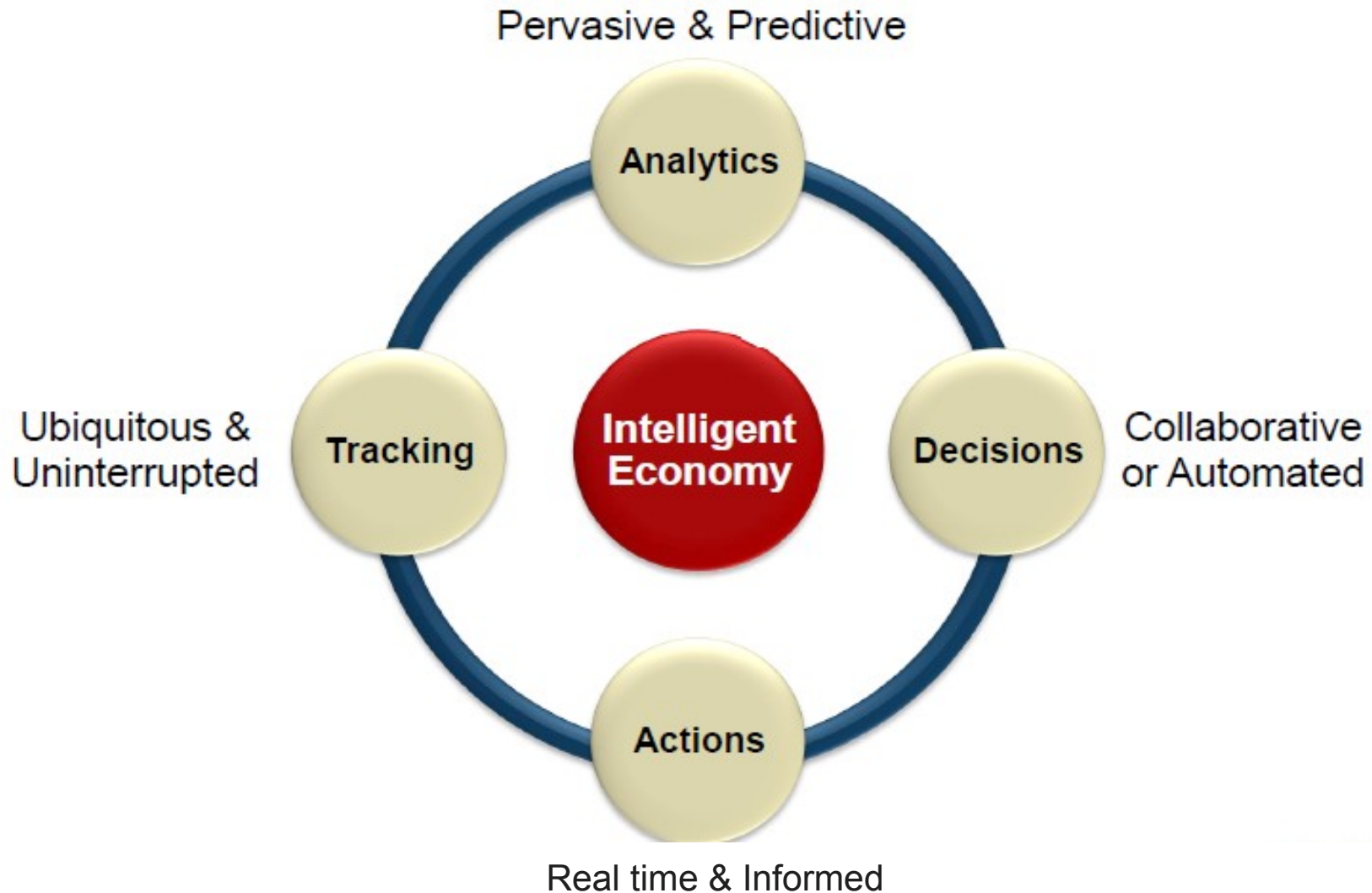
Infrastructure-as-a-Service (IaaS)





Focus on Intelligence

New Intelligence Demands on Decision Makers



Dealing with “Big Data”

- Large enterprises (BFSI, energy, telecoms, government, etc.) have to deal with Big Data
- Heterogeneous data from multiple sources, often structured and unstructured
- High volumes (size and/or rate) of data that are dynamic and changing, rather than static
- Unpredictable contents—no apparent schema or structure
- A requirement for real time or near real time collection, analysis, and access



Traditional RDMS, data warehouse & BI tools may not scale

Big Data needs a set of technologies designed to manage, mine, and analyze large collections of information to solve complex problems

The Power of Business Analytics Beginning to Be Realized

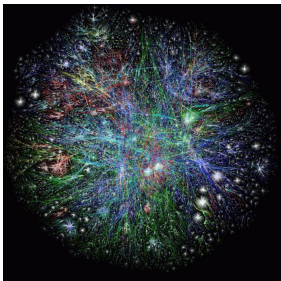
65%

Scoping *Business Intelligence*

Projects in 2011

- Improved BI for mgmt reporting (and strategy) becoming critical
- Banks & Telcos at the forefront of analytics usage, given compliance & regulations
- The manufacturing sector, which has traditionally lagged behind, will increase investment
- The ongoing privatization initiatives of the Govt will lead to greater BI investments

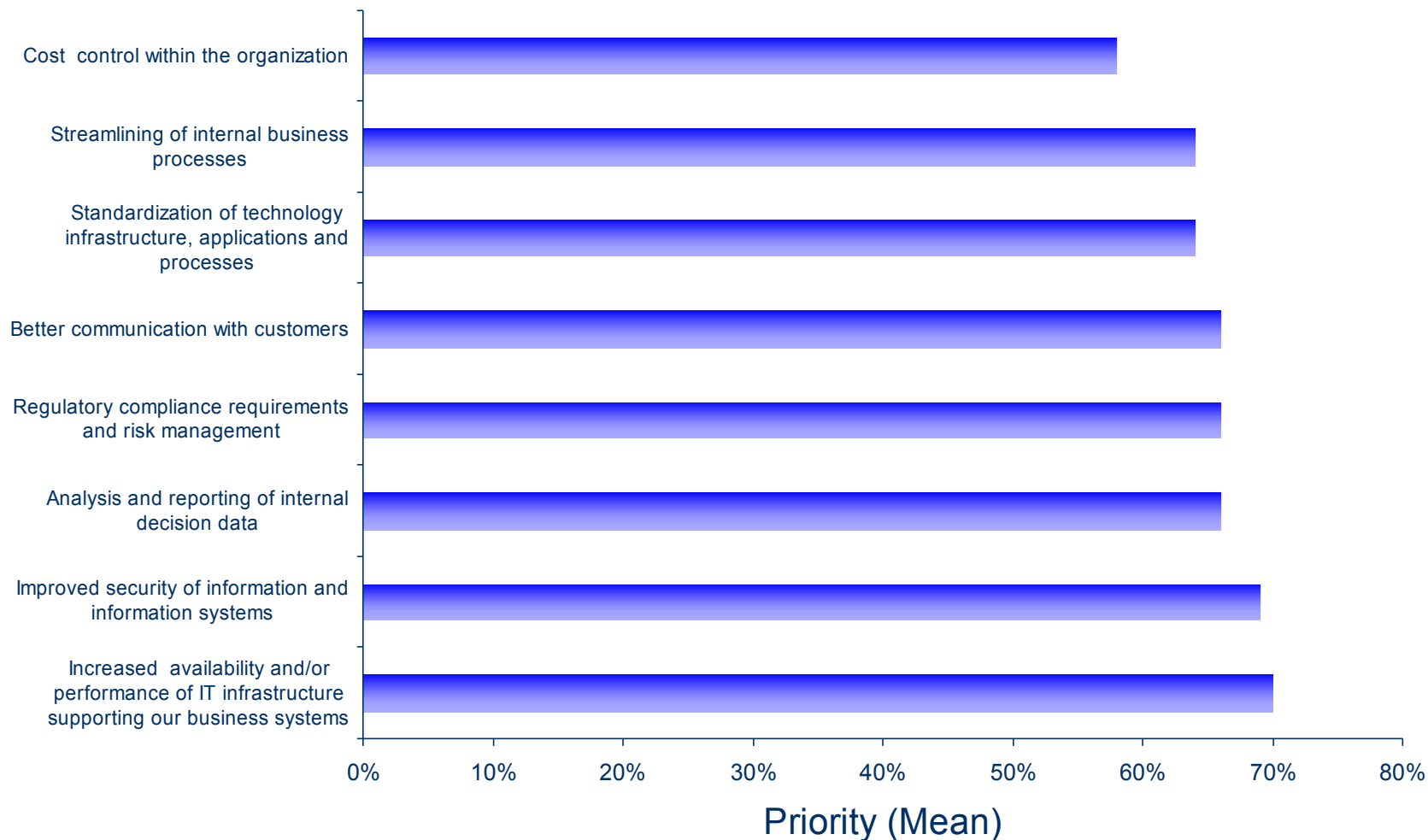




IT Complexity Continues to Increase

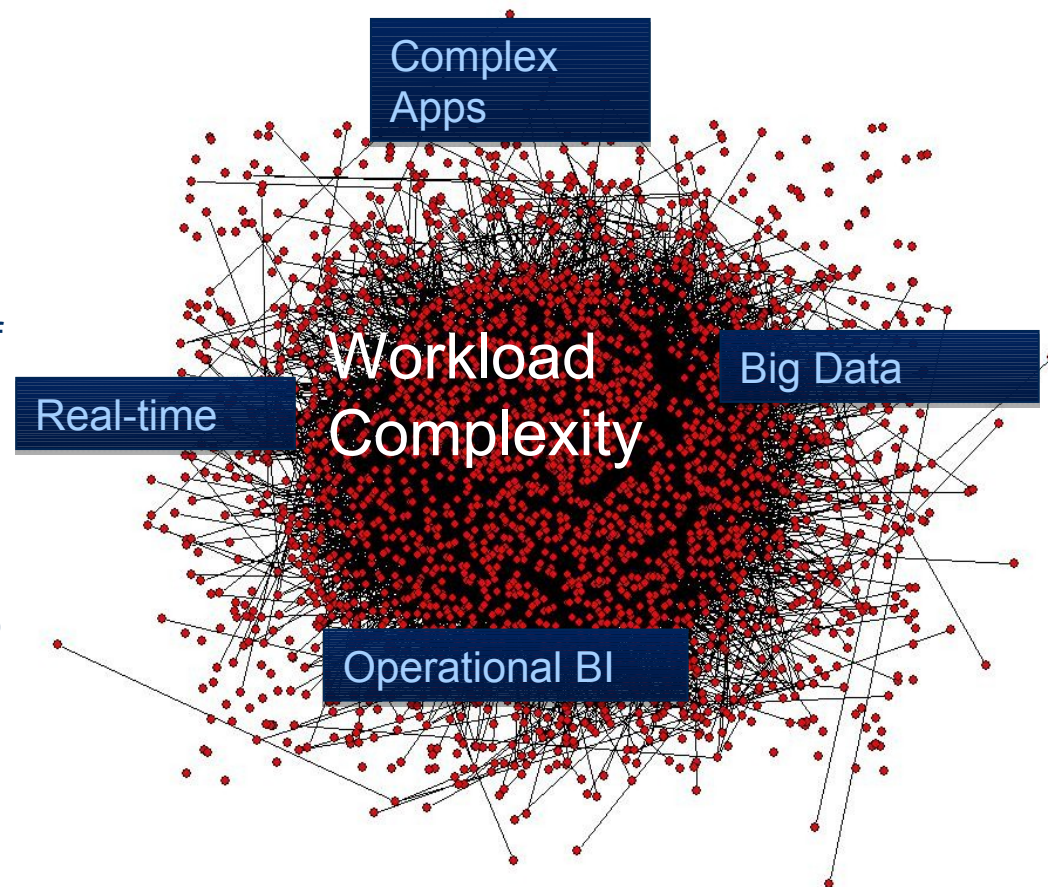
Availability, Performance & Security Challenging

Q. How will each of the following factors represent ICT expenditure at your organization over the next 12 months? Please indicate your answer using 5 points scale where 1 means lowest priority and 5 means highest priority.



Workload Complexity Increasing Rapidly

- Distinction between transactional, analytical, collaborative & other systems eroding
- Consolidation of servers, closer integration of diverse software components and pressures for “real-time” interaction
- More complex & diverse workloads; e.g. SCM, CRM; Widespread trend towards use of “operational BI”
- Accelerating business cycles - magnifies stresses on underlying system infrastructures
- No longer able to define performance in app or workload specific terms -> **key variable is the efficiency with which systems execute heterogeneous workloads**
- Effective workload mgmt need to improve the efficiency with which server resources are used



Optimized Systems Emerging

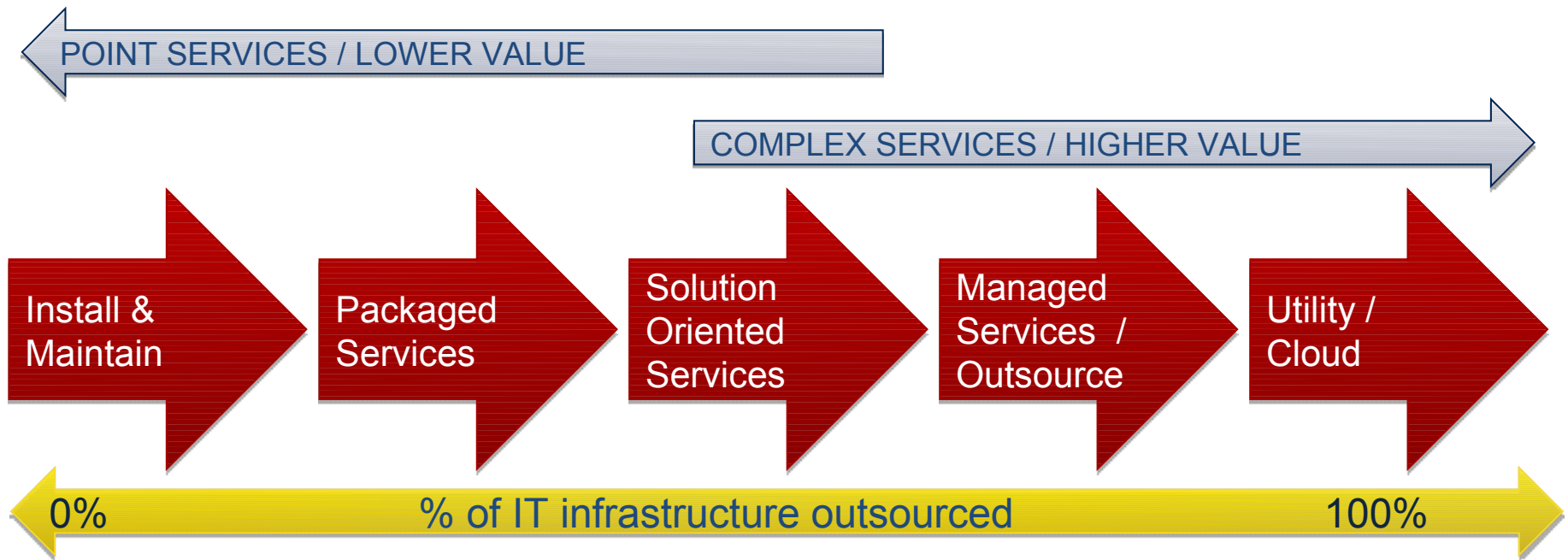
- Workload optimized systems designed for specific workloads emerging – e.g. data warehousing, complex analytics
- One particular high-performance workload gets dedicated, full-stack infrastructure
- Options for enterprises looking to simplify & quicken deployment of high-performance solutions – *Big Data needs*



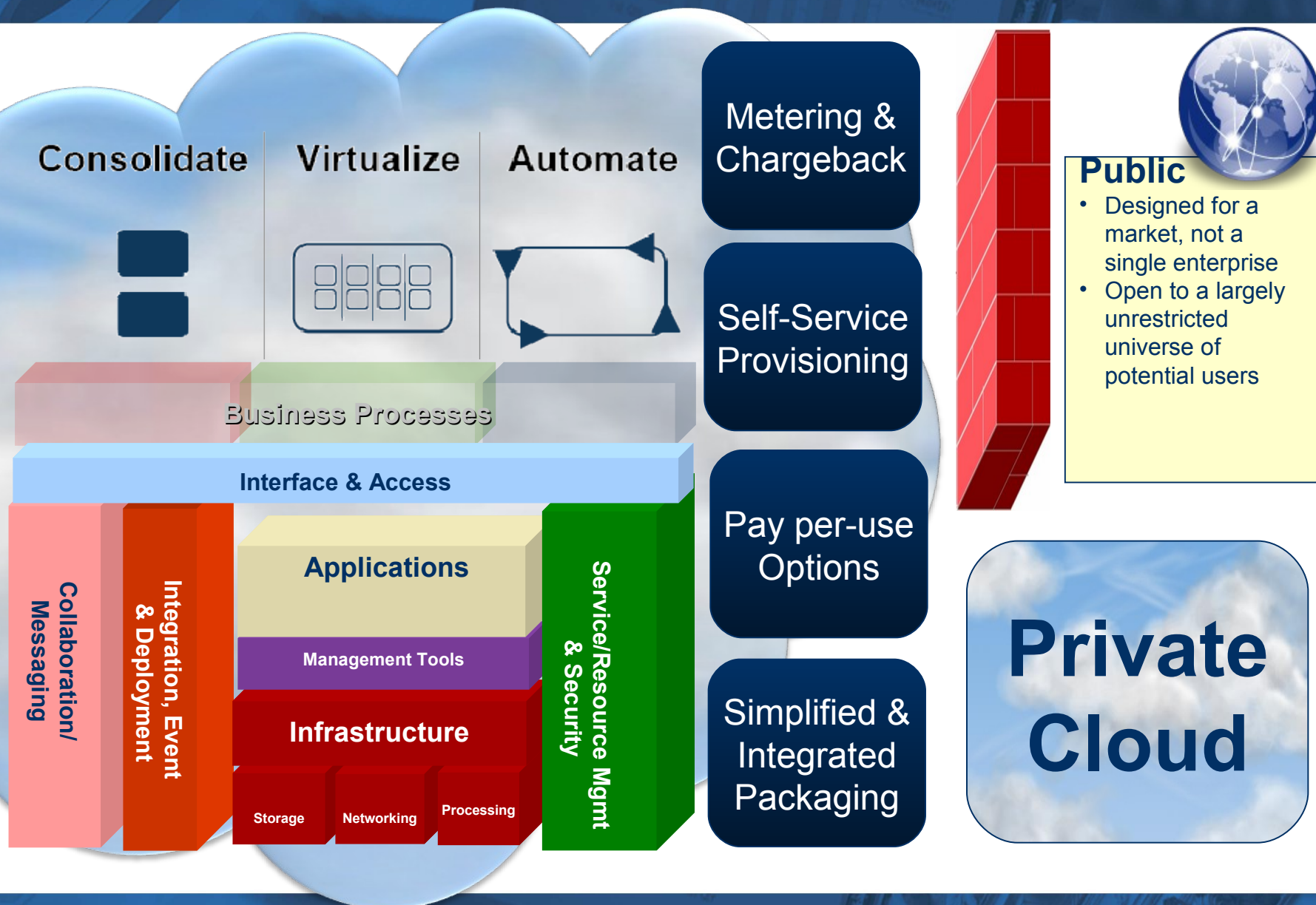


Optimizing Services Delivery

Evolution of Services Delivery



Virtualization as Foundation for the Cloud



Cloud Goes Beyond Virtualization to Focus on Services & Consumption

Virtualized Data Centers
Manage Components
and Images



Cloud Delivers
Services

Static &
Dedicated

Infrastructure

Dynamic &
Pooled

Component
Health

**Policies &
Governance**

Standardized
Service SLAs

Ad hoc and
Disconnected

Processes

Automated &
Integrated

Limited Usage
Visibility

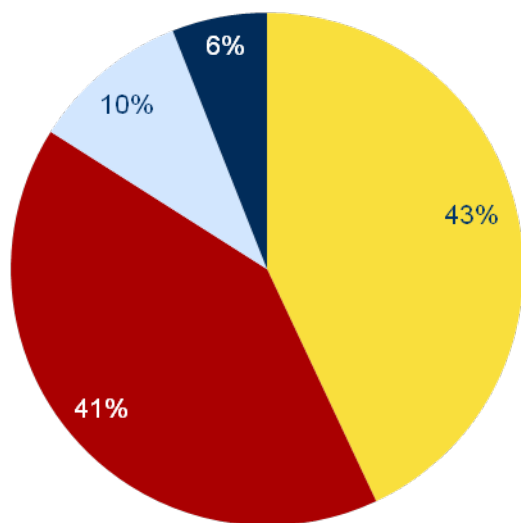
Metering

Consumption
Aware

Cloud Adoption Trends in Türkiye

Q: Which statement best reflects your current or future adoption of a cloud environment?

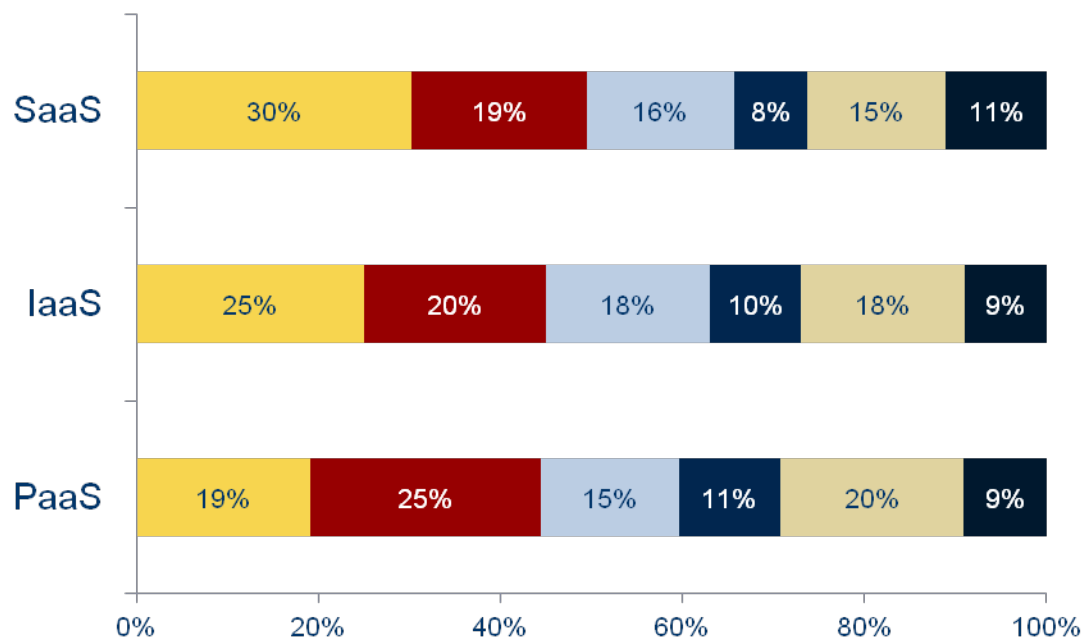
Cloud Adoption



- We are currently deploying / planning to deploy a Private Cloud
- We have no interest in deploying any kind of cloud environment
- We are currently deploying / planning to deploy a Hybrid Cloud
- We are currently utilizing / planning to utilize Public Cloud

n=135

Cloud Services Adoption and Timelines



- Currently Using/Deploying
- Planning to use in the next 12 months
- Planning to use in the next 12-24 months
- Planning to after 24 months
- No plans
- Don't Know

n=79

34% Scoping *Cloud*

Projects in 2011

- Türkiye still lags behind more mature markets in terms of willingness to use Cloud but trends similar to countries in Central & Eastern Europe
- Lack of understanding of cloud preventing greater adoption
- Increased adoption of virtualization is driving a shift in attitudes towards Cloud, but many are confusing virtualization initiatives with building out Private Cloud
- Low/non-critical, wide-impact & centrally managed workloads will see early adoption
- Finance & Telcos early adopters – primarily on private cloud

Summary & Guidance

- Focus on technologies & models that drive *optimization and efficiency*
- Equip your business with *intelligence* (visibly demonstrate the value of IT to business)
- As workload complexity increases, *workload prioritization & optimization* will become essential
- Cloud will see uptake as CIOs look to optimize *services delivery*
- *Integrated management* of physical & virtual resources across a hybrid environment (traditional / private cloud / hybrid cloud) becoming critical – *will affect performance, capacity utilization and availability*



Thank You!

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