

2015 London Finance Sector Private Cloud Vendor Market Update



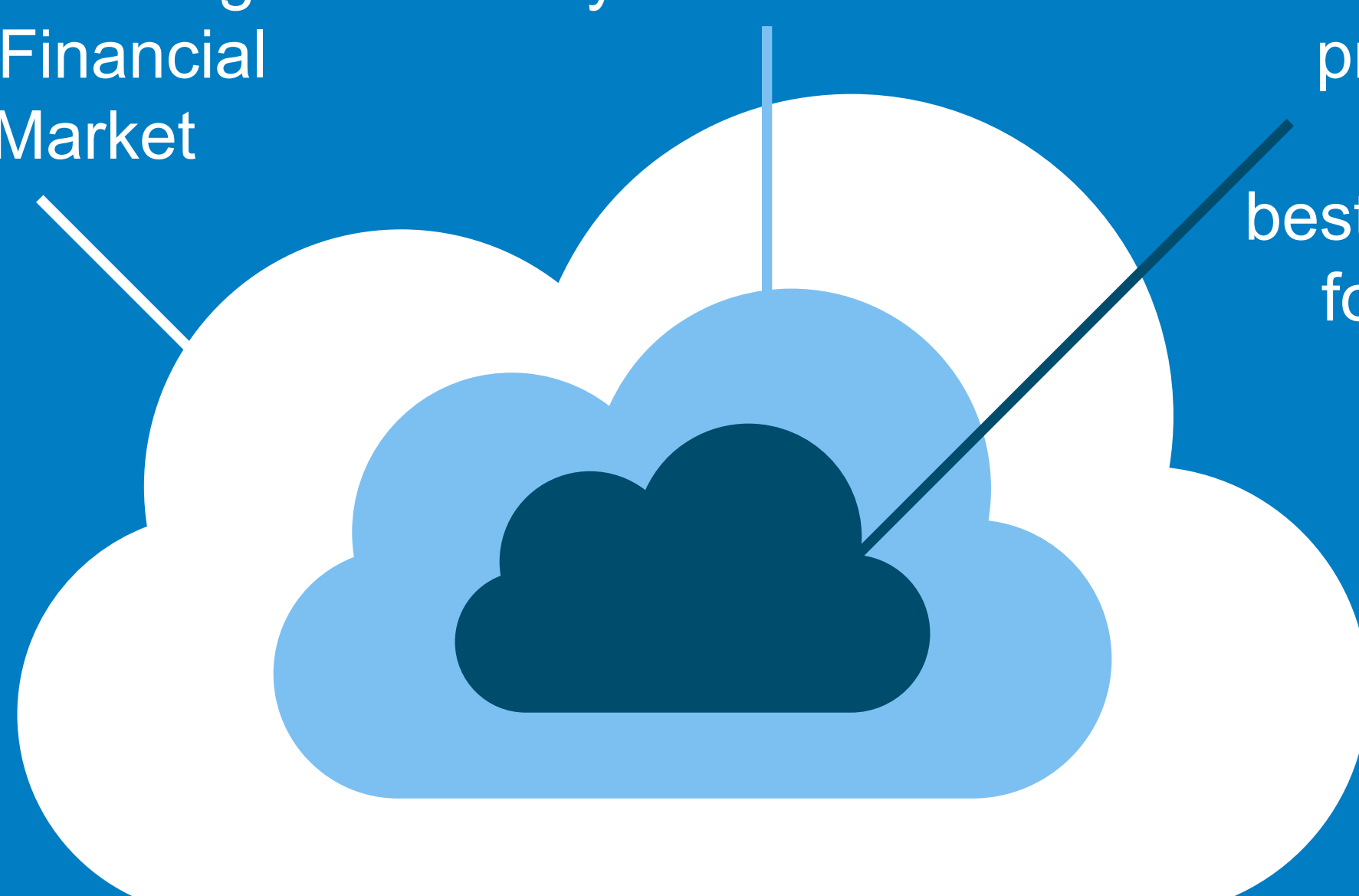
Data sourced from The Clover Engine™
The UK's No.1 Cloud Vendor Rating index

The IT MSP and Cloud Vendor Landscape in UK FS

146 Managed IT Services Vendors target the London Financial Services Market

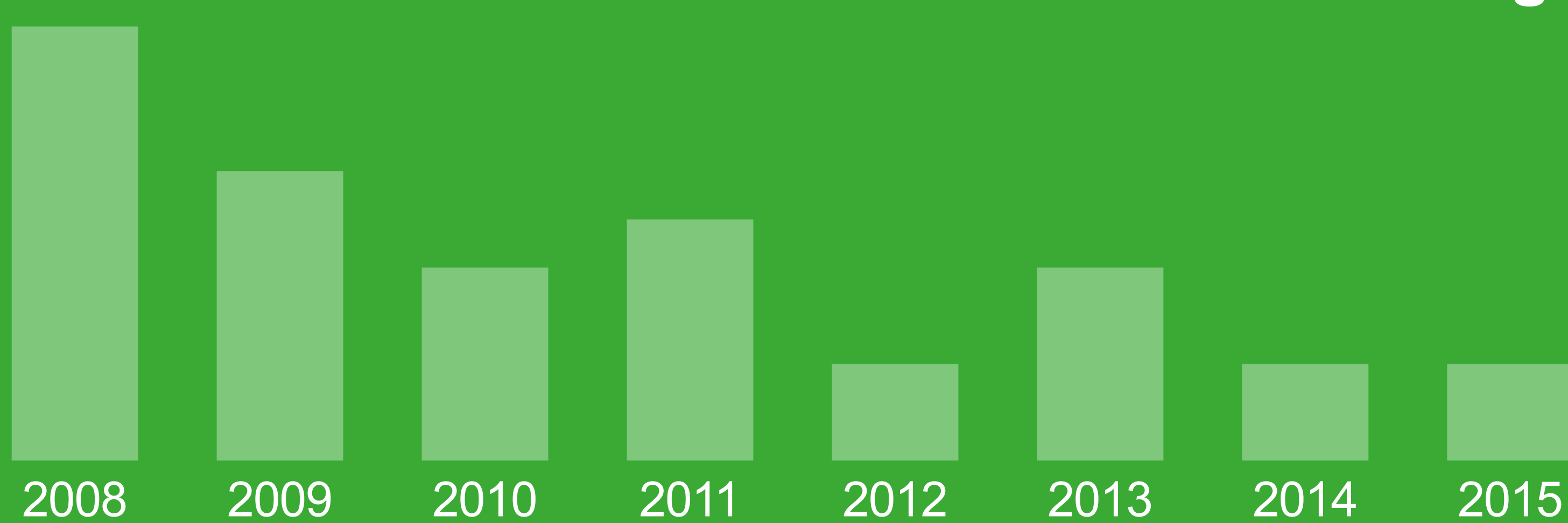
62 offer Private Cloud or Hybrid Cloud IaaS

Only **31** of these have been pre-qualified by BEC to meet best practice criteria for UK Finance

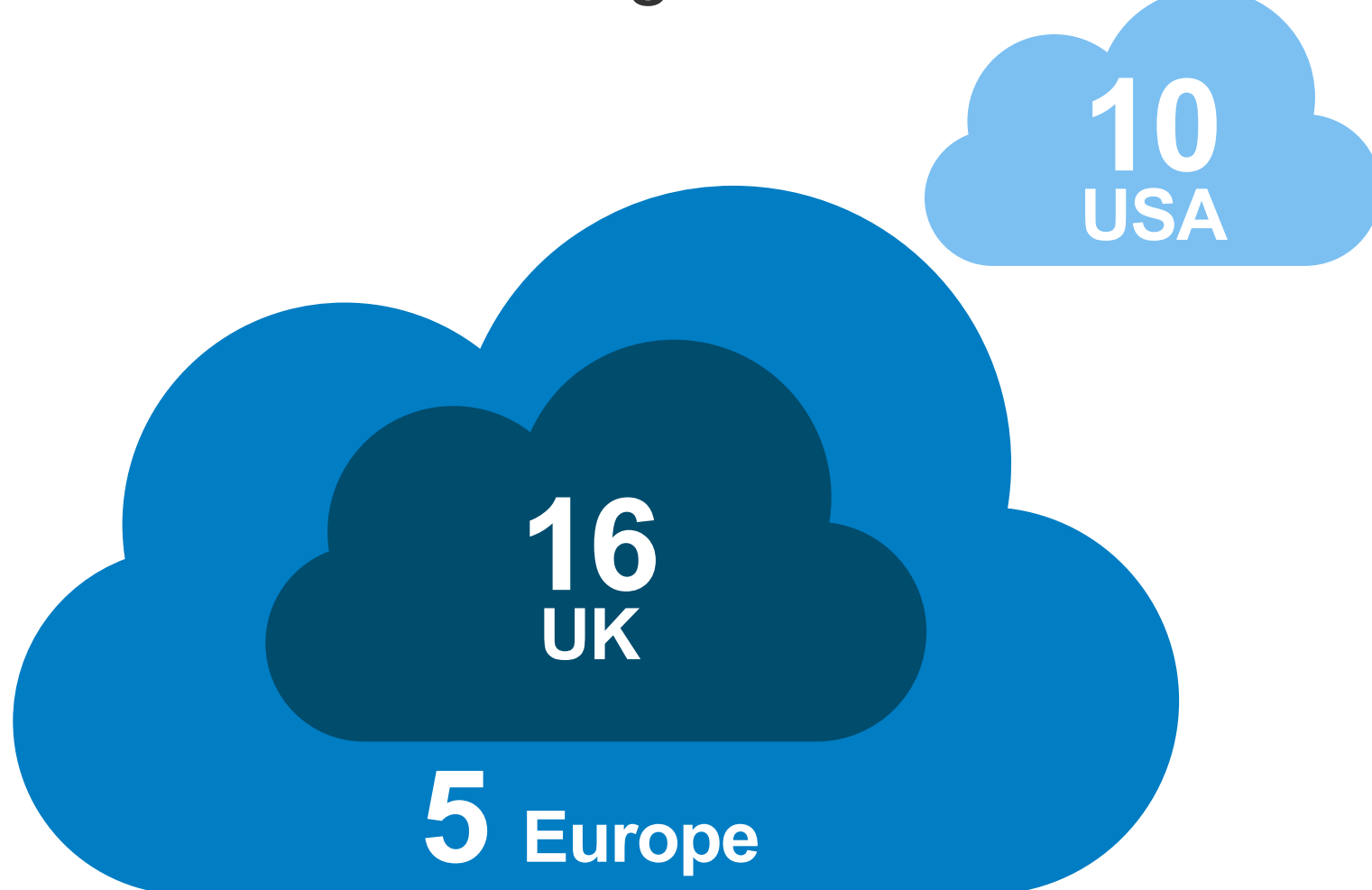


Only 21% of MSPs who target UK Financial Services offer fully compliant Private or Hybrid Cloud services

And new entries to UK Cloud Market are decreasing...



Where do these pre-qualified vendors originate from?

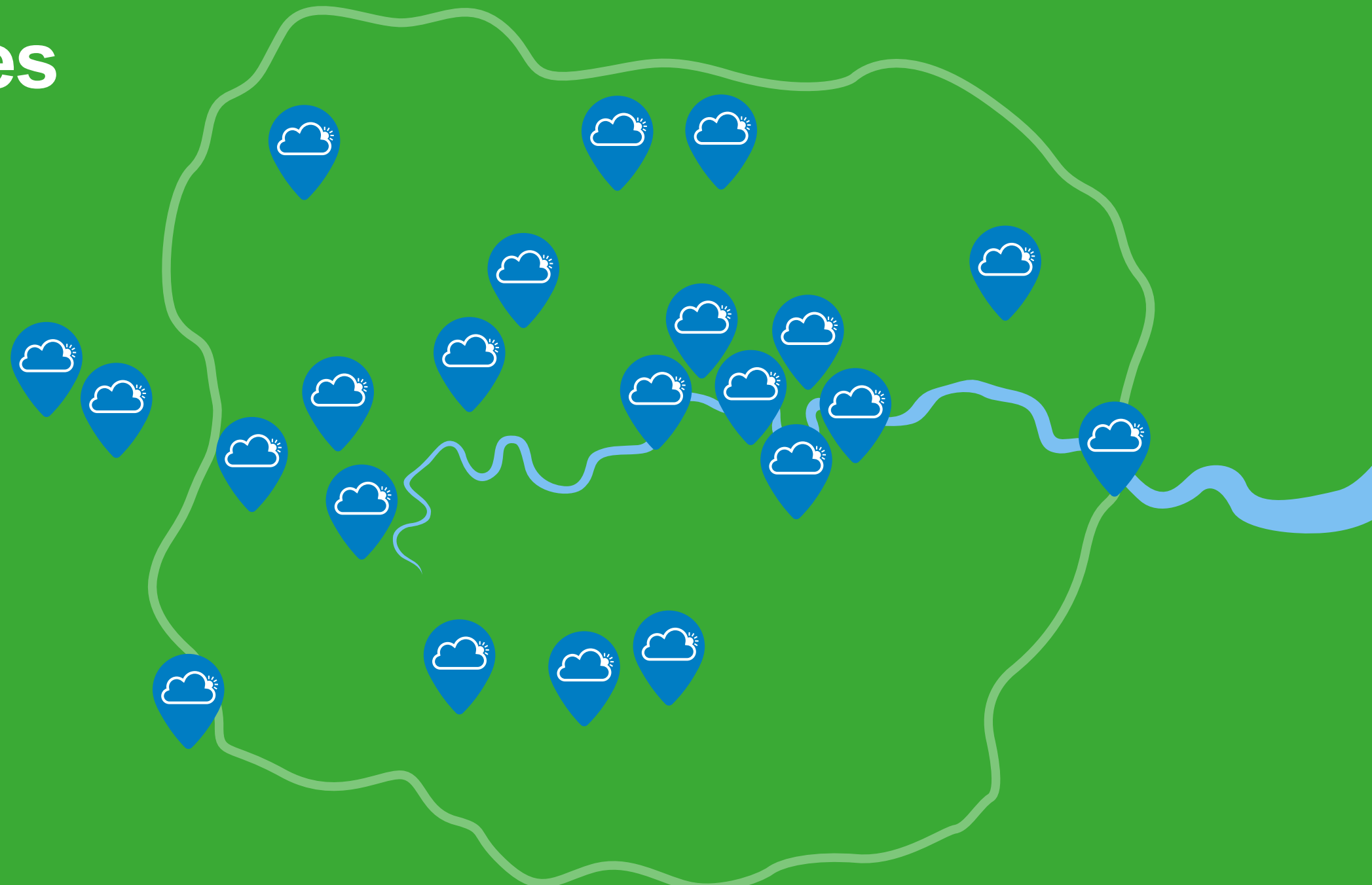


And where else do they offer their Cloud services?



Which Datacentres are UK FS MSP Vendors using?

The trend in recent years has been away from East London...



How big is the UK Cloud Market really?

Despite the hype, year-on-year Private Cloud revenue growth in the UK has actually been modest

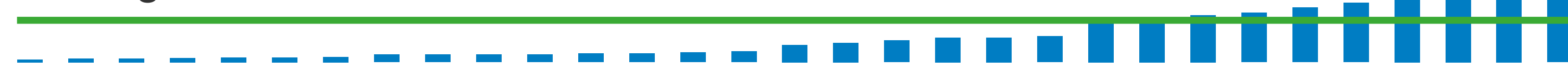
Average client sizes for these vendors are growing but are still really quite small

147% increase from 2011 to 2014

£400,000 in 2014

A handful of vendors are getting all of the larger clients

Average number of virtual servers = **48**



Where does the UK figure on a Global scale?

For the US centric and global cloud vendors who play in the UK market, we are a small contributor to their global revenues

11% in 2014

And even more so when we look at "Cloud Only" revenues derived in the UK – circa 1% of global revenues for these vendors in 2014!

1%

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