

THE JOURNEY TO CLOUD SOVEREIGNTY

ASSESSING CLOUD POTENTIAL TO
DRIVE TRANSFORMATION AND
BUILD TRUST

Elements of cloud sovereignty

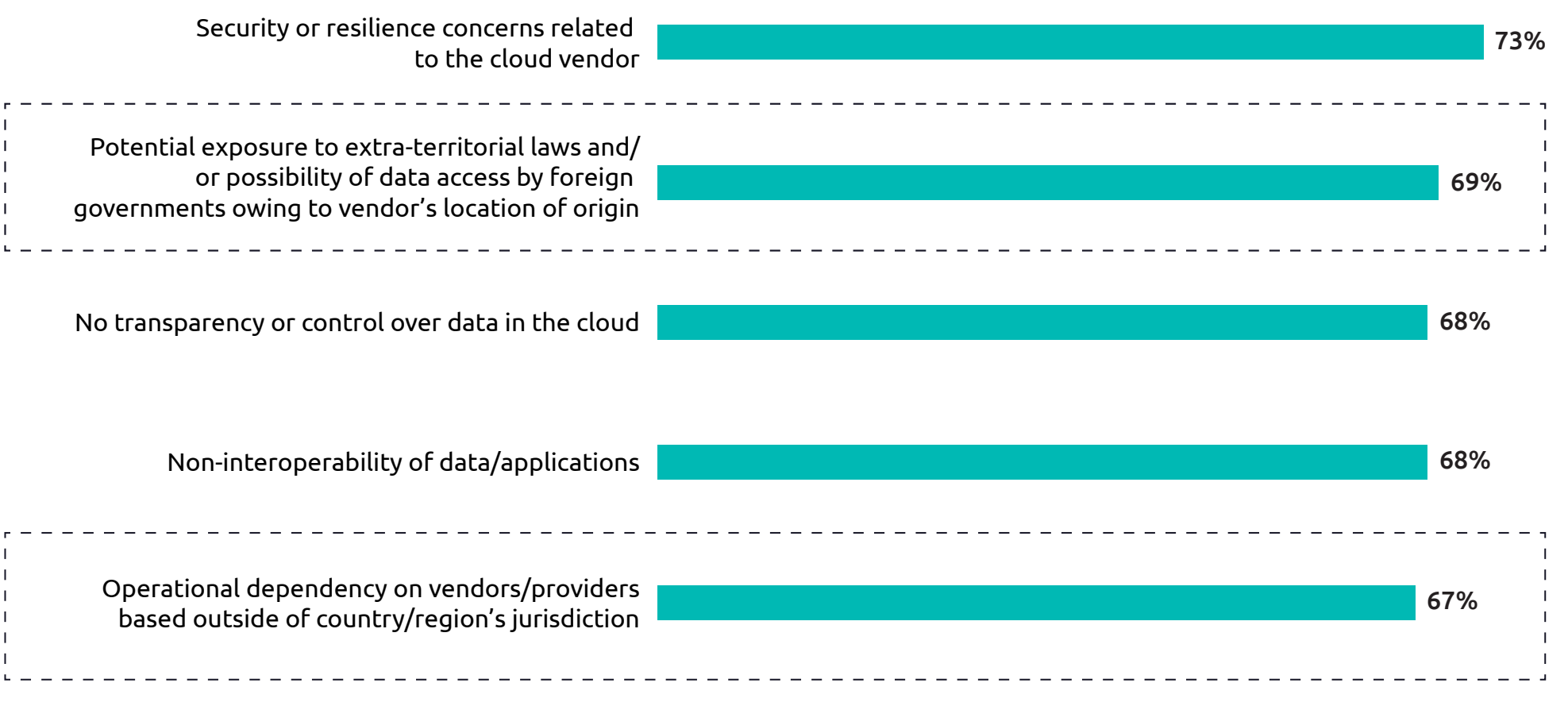
Data Sovereignty	Operational Sovereignty	Technical Sovereignty
<ul style="list-style-type: none"> Data Localization: Hosting, using, storing or processing of cloud data in preferred location or jurisdiction (usually home country/region/territory) Data Ownership: Data is at all times under the control and ownership of its originator/producer 	<ul style="list-style-type: none"> Data Traceability: Focus on management and transparency of data across the lifecycle Data Access Controls: It is about who can access the data, from where and for what purpose Operational Resilience: Ensuring continuity of cloud service in case of unplanned disruptions Regulatory Compliance: Focus on alignment with region/sector-specific regulations and laws 	<ul style="list-style-type: none"> Sovereignty of ecosystem of partners including telcos/ network provider or API calls Following the security objectives, controls, governance management; detection of and reaction to cyber attacks Portability and Reversibility: Ability to move applications and data from one cloud-computing environment to another with minimal disruption Interoperability: Solution follows integration standards and can be easily connected to existing and/or future solutions from other providers

Note: There is no single definition of cloud sovereignty; the report outlines key elements in Capgemini's views along with the priorities highlighted by organizations. Source: Capgemini Research Institute Analysis.

Cloud sovereignty is gaining prominence

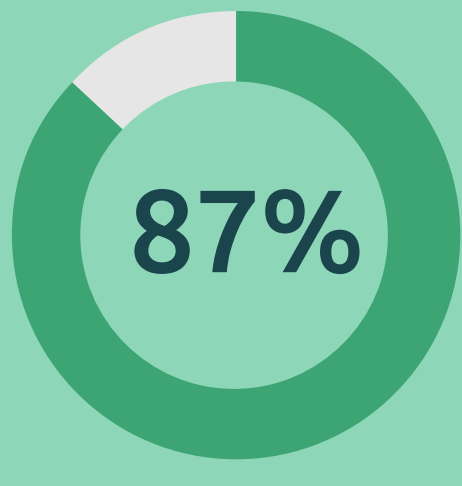
Organizations cite sovereignty-related concerns in the current cloud environment

Top 5 concerns with current cloud environment



Source: Capgemini Research Institute, Cloud Sovereignty Survey, May-June 2021, N = 1,000 organizations.

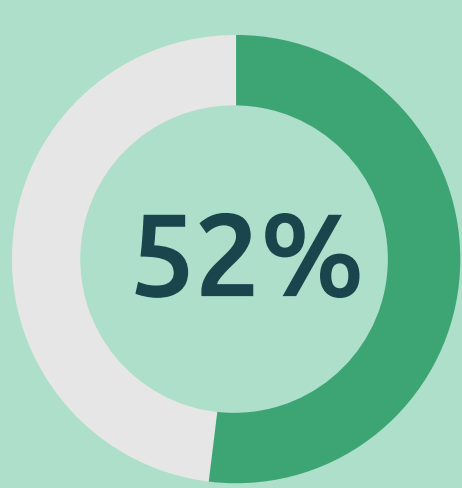
Organizations anticipate intensifying demand for cloud sovereignty



Organizations see cloud sovereignty gaining importance in the future, either as standalone solutions, or through hybrid models

Source: Capgemini Research Institute, Cloud Sovereignty Survey, May-June 2021, N = 1,000 organizations.

Organizations are progressing on cloud sovereignty with a focus on data localization



More than half of organizations will include sovereignty in their overall cloud strategies in the next 12 months; and 6% already have a well-defined strategy

Source: Capgemini Research Institute, Cloud Sovereignty Survey, May-June 2021, N = 1,000 organizations.

Organizations associate cloud sovereignty with data localization, irrespective of actual degree of sovereignty

	Public cloud with non-local origin vendors and without any restrictions of where cloud is being deployed, managed or governed	Public or hybrid cloud (including vendors of non-local origin); and data localization within national/regional borders at locally-approved data centers	Use of disconnected or open source software platforms or components from vendors of non-local origin	Operation of non-local solutions by a trusted local provider or a local legal entity	Exclusive use of cloud providers based in the same legal jurisdiction and storing data within national/regional borders	100% in-house private cloud
Expected Sovereignty Continuum*	Least sovereign					Most sovereign
What do organizations most associate with cloud sovereignty?*** (Top 1 ranked)	0%	43%	8%	12%	14%	22%
What solutions are expected to be used in next 1-3 years?***	16%	38%	16%	14%	11%	6%

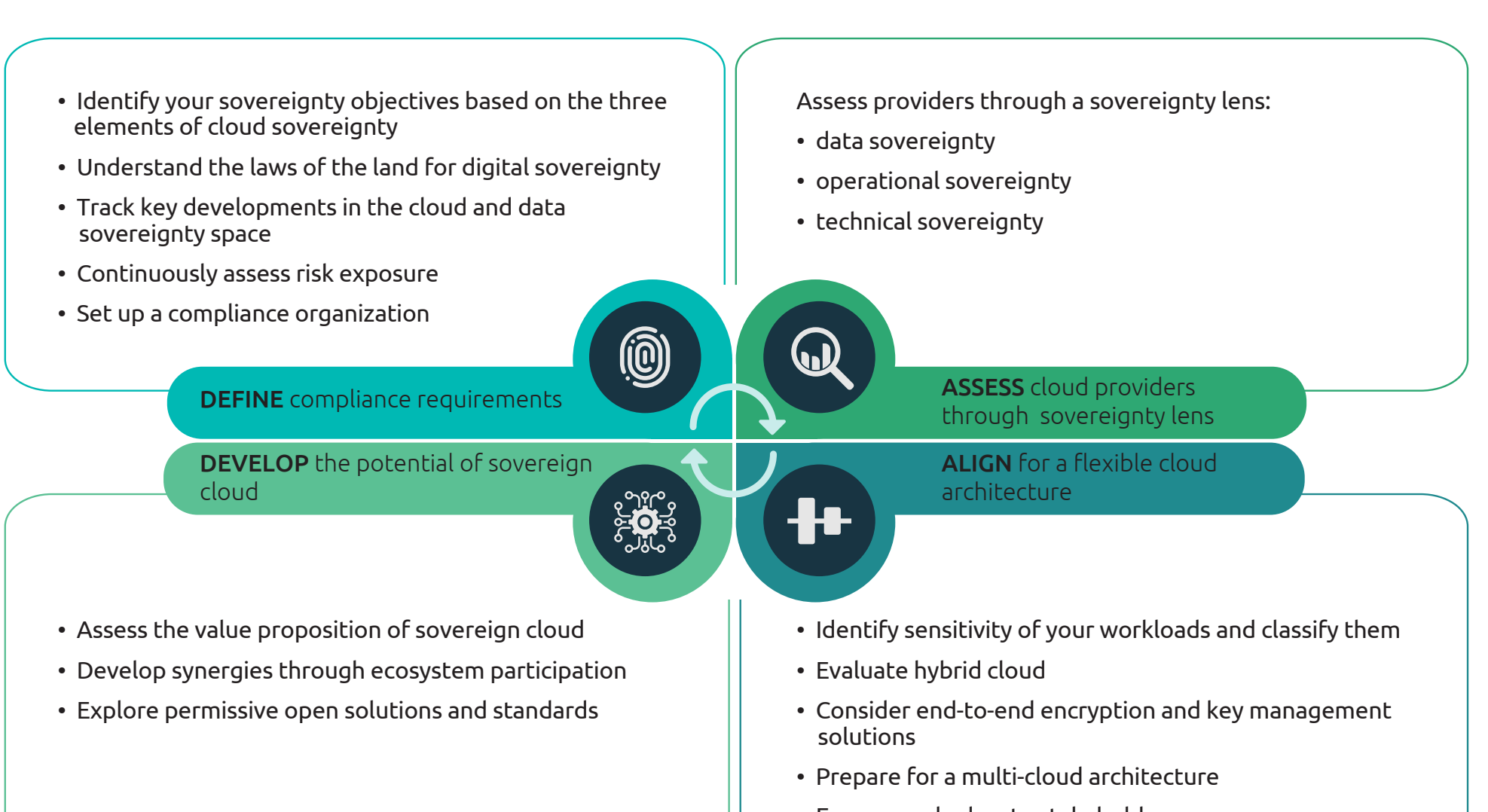
Note: *highlights continuum of cloud organizational definition of sovereignty; **highlights expected solutions in the next 1-3 years (representing greater degree of sovereignty); ***highlights organizational definition of sovereignty; ****highlights expected solutions in the next 1-3 years. Source: Capgemini Research Institute, Cloud Sovereignty Survey, May-June 2021, N = 1,000 organizations.

Organizations expect cloud sovereignty to build trust, foster collaboration, and accelerate the move to a data-sharing ecosystem

63% organizations believe that cloud sovereignty will provide them with a trusted and secure cloud environment for data

55% organizations believe that cloud sovereignty will create better opportunities for collaboration across different sectors in a safe and secure manner

Organizations are progressing on cloud sovereignty with a focus on data localization



Source: Capgemini Research Institute Analysis.

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