The Cloud Map 2011

Table of Contents

2011 Cloud Map

The Cloud is emerging at an incredible pace and keeping current on the key developments, influencers, trends and evolution is a must.

The Cloud Map project is designed to bring you a few uncommon insights into various Cloud debates. Insights into government regulatory initiatives and how they're being influenced, security and privacy concerns and cloud delivery models to name a few. We will be tapping into the pulse of the debate across the Internet, the Twittersphere and the Blogosphere. We will follow how the topic or issue is being discussed, who it involves, what is being said and who the main actors in the story are.

1. The Government Regulation Cloud Map

We put The Cloud Map to work on government regulation in the Cloud space. Many of the existing policy regimes across Asia governing matters such as privacy, data protection, cyber security and intellectual property rights, are or will be up for consideration in the near future by policy-makers, so vendor participation in the discussion is critical. Browse the map below and click on the pins to explore a selection of the online conversation patterns we unearthed. We have gathered a wealth of detail on various Cloud issues so if you would like to discuss the issue further, or have an issue you would like us to track for you, do get in touch. The Cloud Map Software is provided by **The Stakeholder Company**

http://www.topnews.ir
http://www.itwire.cor
http://www.whatech.com.au
http://green.enterpriseinnovation.ne
http://www.telecomseurope.ne
http://www.washingtonpost.cor
http://www.itnews.com.au
http://bx.businessweek.com
http://www.economist.com
http://www.networksasia.ne
http://www.theaustralian.com.au
http://www.zdnet.com.au

EDWARD TIAN
BRAD SMITH
VERENDA SMITH
PAUL GARVER
GAIL KELLY
SEAN KELLEY
DAN PITT
LAMAR SMITH
PETER DINHAM
PAUL SAFFO
RON WYDEN
DAN KUSNETZKY
PETER SILVA
CHRIS CALABRESE
DAVID THODEY
JIM MCGEEVER
JULIA GILLARD
http://www.smartplanet.com
MARK LOUGHRIDGE
STEVE JOBS
http://advancedtrading.com
DAVID CHOU
MICHAEL DELL
http://www.zdnet.com
CURT AUBLEY
KRISHNAN SUBRAMANIAN
VIVEK KUNDRA
http://www.advancedtrading.com
WILLIAM FORREST
BEN MCINTOSH
DAVID MEYER
http://www.zdnet.co.u
PHIL ALBINUS
GRADY BURKETT
DENISE AMRICH
http://www.cloudconnectevent.com
PETR JIROVSKY
SIDDHARTH CAVALE
WEB SERVICES
MANUFACTURING
http://www.computerworld.com
http://www.techweb.com
CHENXI WANG
SYSTEMS INTEGRAT
CLOUD COMPUTING ENVIRON
TECHNOLOGY INFRASTRUCTURE
FEDERAL TRADE COMMISSION
EUROPEAN UNION
MELANIE RODIER
MCKINSEY
LEGACY SYSTEMS
CLOUD COMPUTING INFRASTRUCTURE
DEPARTMENT OF DEFENSE
http://www.wallstreetandtech.com
KEVIN SULLIVAN
INTERNAL SYSTEM
CLOUD INFRASTRUCTURE
WHITE HOUSE
NATIONAL INSTITUTE OF STANDARDS AND TECHNOLOG
http://www.cio.com
STEVE ORRIN
DENNIS MOREAU
TELECOMMUNICATIONS
TECHNOLOGY
http://www.networkcomputing.com
ANDREW FEIC
FINANCIAL SERVICES
CLOUD COMPUTING MARKET
SOFTWARE PROVIDERS
CHINESE GOVERNMENT
US GOVERNMENT
http://cloudpundit.com
SHIN KUSUNOKI
ROHIT MEHRA
CLOUD SECURITY ALLIANCE
FEDERAL COMMUNICATIONS COMMISSION
http://www.internetevolution.com
ADAM HONORE
CLOUD SERVICES
HEALTHCARE
CLOUD SOLUTION
GENERAL SERVICES ADMINISTRATION
MARC BENIOFF
http://www.computerweekly.com
MICHAEL HARTE
CLOUD COMPUTING INDUSTRY
ASIA CLOUD COMPUTING ASSOCIATION
BRIAN MCCLENDON
KUTARAGI
LAURENT LACHAL
CLOUD COMPUTING MODEL
COMPUTING
ENERGY EFFICIENCY
TIM MINAHAN
http://www.itworld.com
PENNY CROSMAN
SOCIAL MEDIA
SOFTWARE
CARL BROOKS
DAVID CLARKE
BYRON DEETER
http://www.insurancetech.com
E - COMMERCE
CLOUD COMPUTING
KEVIN CASEY
DANIELASANTANCHE
PAUL MARITZ
ALEX WILHELM
http://www.banktech.com
IDENTITY MANAGEMENT
CLOUD COMPUTING VENDORS
BUSINESS
RAY OZZIE
http://cloudfeed.net
PAUL AYOUB
NATHAN GOLIA
CLOUD APPLICATIONS
CLOUD SOLUTIONS
JOHN WESALVATORE GENOVESE
KURT SALMON
LAUREN SELL
RYAN SAVAGE
SUPPLY CHAIN
BOBBY YAZDANI
BRUCE HOUGHTON
DANA GARDNER
MICHEAL MORGAN
MARK GORMAN
DAVID BOEHME
BUSINESS INTELLIGENCE
VIRTUAL MACHINE
ERIC CHABROW
FEISAL NANJI
AKAMAI MOSS
MIKE SAPIEN
http://www.lightreading.com
DAVID BOLAN
RACHEL DINES
VOIP
JAVA
MATTHEW SPEARE
http://www.pcworld.com
LENNY CHESAL
TOM PETTIBONE
BROADBAND
CLOUD TECHNOLOGIES
ERIC SCHMIDT
GERARD NUSSBAUM
HAROLD MOSS
CLAUDIO CASTELLI
IAN GEOGHEGAN
LARRY RYAN
CRM
MARK HURD
SUSAN MOORE
JOHN ORLANDO
CHRIS WITT
http://www.cio.com.au
JUDY HADDAD
MOBILE DEVICES
LINUX
BRIAN PATERSON
JONATHAN WYLIE
MICHAEL SMITH
EDWARD ANDERSON
RODNEY NELSESTUEN
MOBILE BANKING
SOA
ENCRYPTION
TRACY CHEUNG
LAURENCE GOASDUFF
SAHAR WALI
http://blogs.healthcareinfosecurity.com
SMARTPHONES
STEPHANIE LOI
TOM MCCALL
ROB LEE
http://www.govinfosecurity.com
RELATIONAL DATABASE
FIREWALL
MABEL CHIANG
BEN TUDOR
http://www.networkworld.com
STEPHEN ELOP
http://blogs.govinfosecurity.com
http://www.bankinfosecurity.asi
http://www.mspmentor.ne
http://www.ulitzer.com
http://www.gartner.com
http://careers.govinfosecurity.com
http://www.cio-asia.com
http://www.microsoft.com
http://www.salesforce.com

2. Cloud Map Highlights

1. The global nature of the cloud is appearing on the US regulator's radar, and Asia is taking active not - FCC Urged To Act On Net Neutrality[1]

2. Apple is influential in bringing consumer acceptance of the cloud - iCloud, cloud computing services promise to change the way we use computers[2]

3. Some voices are calling for global security and privacy standards for cloud computing
   a. Cloud Security Needs Global Standards[3] - Interestingly, Microsoft's 10K form outlining cloud risk factors shows up on the map. A guidance manual on risk factors perhaps?
   b. Cloud Computing: Just When You Thought It Was Safe[4]
   c. The Economist continues to make an impact - see 2008, but still influential pie on Computers without borders[5]

4. Risks And Uncertainties[6]
   a. Insurance: Sectors such as insurance are actively looking to the cloud but concerns over the privacy and security of sensitive customer data have made insurers cautious about adoption.
   b. Embracing the Cloud -- But Only to a Point[7]

5. Global Data Breach Regulation is a "When", not an "If"

---

[1] http://www.networkcomputing.com/next-gen-network/229501246
[2] http://www.washingtonpost.com/business/icloud-cloud-computing-services-promise-to-change-the-way-we-use-computers/2011/06/06/AGBdTgKH_story.html?wprss=rss_business
[3] http://www.bankinfosecurity.asia/articles.php?art_id=3620
[4] http://www.wallstreetandtech.com/data-management/cloud-computing-just-when-you-thought-it/231000513
[5] http://www.economist.com/node/12411854?story_id=12411854
[6] http://www.microsoft.com/investor/EarningsAndFinancials/Earnings/RisksAndUncertainities/FY11/Q1/RisksAndUncertainties.aspx
[7] http://www.insurancetech.com/architecture-infrastructure/embracing-the-cloud-but-only-to-a-poi/231300523

a. Data Breach Compliance Legislation is Coming: Are you ready?[8]

b. Majority of South Koreans' data exposed[9]

c. Senators Propose Data Privacy Law[10]

d. In Australia, Peter Kell, Dep Chairman of the Australian Competition and Consumer Commission (ACCC) on the importance for regulators to facilitate appropriate market conduct to ensure that these benefits are achieved

e. Implications of Cloud Computing for Consumers[11]

6. Cloud-Specific Legislation?

a. The Software and Information Industry Association intensifies efforts to avoid cloud-specific legislation/ No need for cloud-specific legislation, SIIA industry group says[12]

b. The Rise of Cloud Regulation[13]

7. China: In China the lack of a Telecommunications Act, and a new regulatory framework from the State Council governing converged services are the biggest challenges

a. China's converged services challenged by regulation: Ovum study[14]

---

[8] http://blogs.ixiacom.com/ixia-blog/data-breach-legislation-penalties/

[9] http://blogs.ft.com/tech-blog/category/asia/#axzz1WgjJodDs

[10] http://www.techweb.com/news/229401531/senators-propose-data-privacy-law.html

[11] http://www.openforum.com.au/content/implications-cloud-computing-consumers

[12] http://www.washingtonpost.com/blogs/post-tech/post/no-need-for-cloud-specific-legislation-siia-industry-group-says/2011/07/26/gIQAHaEaaI_blog.html?wprss=post-tech

[13] http://www.wallstreetandtech.com/data-management/the-rise-of-cloud-regulation/231000516

[14] http://www.cio-asia.com/tech/industries/chinas-converged-services-challenged-by-regulation-ovum-study/

3. The Web Debate

At first glance we were struck by the density of the Government Cloud Regulation map but perhaps no surprise given the current IDC estimate of the market in Asia growing by 40% year on year, with Japan alone reaching US$29bln in 2015.

Top 10 Debate Influencers (Week of June 13)

Site	
http://www.smartplanet.com	
http://www.zdnet.com	
http://www.cio.com	
http://www.wallstreetandtech.com	
http://www.computerworld.com	
http://www.cloudconnectevent.com	
http://www.networkcomputing.com	
http://www.salesforce.com	
http://www.informationweek.in	
http://www.internetevolution.com	

The relative density of nodes on this map indicates that the debate 'temperature' is hot. There is a high level of debate activity and even though the search parameters focused on Asia the debate is being driven from global sources as well as national and regional sources. The range of phrases (grey squares), their specialist nature and their size indicate that Cloud regulation is a complex issue. There are a range of sites of varying influence (green circles of differing sizes) and a good level of involvement from organizations (pink pentagons) and people (yellow squares). So what findings can we extract from these digital 'tea leaves'?

4. Governments in Waiting / Review Mode

Government Websites remain scarce and small indicating they aren't vocal in the debate – perhaps normal if they are in the process of formulating Cloud strategies.

Vendor influence underwhelming

Corporate websites do not feature highly within overall influence with the exception of Saleforce.com. This suggests that, apart from statements made by the CEO and the public relations team, vendors may lack compelling thought leadership content to encourage stakeholders to visit their sites to gain influence in the debate.

Industry portals and the tech press leading the debate

Industry portals are driving influence by various tactics including circle linking strategies. Note the clusters of Web sites on the left of the map (the UBM TechWeb properties such as InformationWeek), the top left (The ISMG group with their various security information portals) and the bottom mid-right cluster of sites (the Questex Asia publisher of Telecom titles and others such as CFO Innovation). Zdnet may have a smaller clustering but remains very influential in the debate. Mainstream portals such as the FT and The Economist also make an appearance (right side) though exert relatively less influence than the tech properties.

5. Key Terms and Phrases

Voip Federal Communications Commission Firewall Cell Phones Energy Bank Mobile Devices Cloud Computing Environment Wi-fi Australian Government Cloud Security Alliance National Institute Of Standards And Technology Cloud Computing Services Html Cloud Computing Vendors E - Business Mobile Phones E - Commerce Cloud Computing Infrastructure Cloud Computing Initiatives White House Cloud Computing Market Wan Cloud Computing Platform Internet Users Data Management Cloud Computing Solution Business Intelligence Enterprise Software Crm United Nations Financial Services International Organization Cloud Computing Systems Us Government Office Of Management And Budget Atm Federal Trade Commission Smartphones Soa Web Services Internal Infrastructure

Information Technology Operating Systems Ethernet Cloud Computing Cloud Solutions European Union Cloud Computing Solutions Cloud Services Oil Social Media Banking Technology Leaders Newsletter Software Java Standardization/international Electrotechnical Commission 3g Encryption Obama Administration Cloud Computing Model Web Hosting U.s. Congress Virtualization Technologies Computing Joint Infrastructure Broadband Technology Infrastructure Financial Management Federal Government Nhs Document Management

No common Cloud dialect for the moment.

Key words and terminology remains relatively fragmented. Apart from the central nodes of 'Cloud service', 'computing' and 'Cloud computing' the debate is spread across notions of 'environments', 'infrastructure', 'utility', 'platforms' and 'solutions' to name just a few.

Opportunity for the industry to establish a common dialect?

There also appears to be no content the most central to the Cloud regulation debate, the discussion rather being dispersed over many thought pieces and Web properties.

6. Key People

Many and senior.

There are a significant number of individuals (yellow squares) involved, and these individuals include senior executives of vendor companies (ex. Brad Smith of Microsoft, Steve Jobs of Apple and Jeff Campbell of Cisco) and leaders in their fields (Vint Cerf of Google). So the Cloud regulation debate is placed firmly in the boardroom.

Government individuals less prevalent.

Government individuals lack relative prominence in the debate. Those that appear include U.S. Federal CIO Vivek Kundra and in Asia Jeremy Godfrey and Stephen Mak (ex and current Government Chief Information Officer of Hong Kong) making waves with the concept of an internal Cloud app delivery focus or Hsang Chen Lee, director of Taiwan's National Police Agency from an online security focus.

About the 2011 Cloud Map

The Cloud is emerging at an incredible pace and keeping current on the key developments, influencers, trends and evolution is a must.

The Cloud Map project is designed to bring you a few uncommon insights into various Cloud debates. Insights into government regulatory initiatives and how they're being influenced, security and privacy concerns and cloud delivery models to name a few. We will be tapping into the pulse of the debate across the Internet, the Twittersphere and the Blogosphere. We will follow how the topic or issue is being discussed, who it involves, what is being said and who the main actors in the story are.

About the Asia Cloud Computing Association (ACCA)

The ACCA is a leading industry association comprising the stakeholders of the cloud computing ecosystem in Asia. The ACCA works to ensure that the interests of the cloud computing community are effectively represented in the public policy debate. Our primary mission is to accelerate the growth of the cloud market in Asia, where we promote the growth and development of cloud computing in Asia Pacific through dialogue, training, and public education. Through regular meetings, we also provide a platform for members to discuss implementation and growth strategies, share ideas, and establish policies and best practices relating to the cloud computing ecosystem. | Interested in membership? Contact us at secretariat@asiacloudcomputing.org, visit us online at http://www.asiacloudcomputing.org. You can also find us on LinkedIn at https://www.linkedin.com/groups/6586132 or on twitter@accacloud