MULTI-CLOUD MANAGEMENT

HOW TO EFFECTIVELY MANAGE MULTI-CLOUD ENVIRONMENTS

A White Paper from DoubleHorn
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# GLOSSARY

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<th>Acronym/Abbreviation</th>
<th>Definition</th>
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<tr>
<td>CSB</td>
<td>Cloud Services Brokerage</td>
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<td>CSP</td>
<td>Cloud Service Provider</td>
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<tr>
<td>ISV</td>
<td>Independent Software Vendor</td>
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<tr>
<td>IaaS</td>
<td>Infrastructure as a Service</td>
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<td>PaaS</td>
<td>Platform as a Service</td>
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<td>SaaS</td>
<td>Software as a Service</td>
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<tr>
<td>SME</td>
<td>Small and Medium Enterprise</td>
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<td>API</td>
<td>Application Programming Interface</td>
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<tr>
<td>TSP</td>
<td>Telecommunications Service Provider</td>
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<tr>
<td>MSP</td>
<td>Managed Service Provider</td>
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<tr>
<td>VAR</td>
<td>Value-Added Reseller</td>
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<tr>
<td>IT</td>
<td>Information Technology</td>
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<td>CAGR</td>
<td>Compound Annual Growth Rate</td>
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1. ABSTRACT

The digitization of businesses and the way that IT supports the needs of these businesses has changed significantly over time. Today, different IT workloads can be deployed on different types of cloud services, depending upon the business requirements. As a result, many IT departments are moving their infrastructure to cloud and multi-cloud virtual environments. The key factors attracting enterprises to this cloud-based model are reduced cost, faster deployment, enhanced scalability, improved agility, increased productivity, lower total cost of ownership, and lower capital & operating expenditure, among others. Furthermore, the pay as you go model has provided enterprises with a new degree of financial flexibility, as they pay only for what they use.

A multi-cloud management platform allows enterprises to manage workloads and applications across all cloud deployment models, including public, private, and hybrid. Using the right platform for this workload enables enterprises to drive favorable business results. The multi-cloud approach facilitates transition to the IT-as-a-Service (ITaaS) model, where IT departments act as service brokers and support organizations in optimizing their IT infrastructure consumption. Additionally, cloud computing benefits such as cost savings, faster time to market, flexibility, and performance will compel the adoption of multi-cloud management in the future.

The purpose of this whitepaper is to provide an understanding of the considerations surrounding multi-cloud management. They are given below:

- What are the key features, recent developments, and current trends in this market?
- What are the benefits, challenges, and opportunities existing in this market?
- How has the market evolved? What is the architectural framework of the multi-cloud management?
- How can DoubleHorn’s multi-cloud management platform impact business performance and drive results?
2. MULTI-CLOUD MANAGEMENT: AN OVERVIEW

MULTI-CLOUD MANAGEMENT

Multi-cloud management is an open cloud platform delivered “as-a-service” to provide flexibility to the enterprises and enable the management of multiple cloud services such as IaaS, PaaS, and SaaS. In the multi-cloud environment, enterprises can transfer their workload on multiple clouds, depending on the criticality of data and applications. Nevertheless, multi-cloud management is different from the hybrid cloud deployment model. Hybrid cloud is an integrated service, provided both in-house and externally. It is an amalgamation of private and public cloud, thereby offering the benefits of both the deployment models simultaneously.

Enterprises require multiple cloud deployments to cater to the demands of multiple applications, tools, departments, and others. Various departments face a different set of challenges. For example, the legal, procurement, and finance departments are concerned about security and compliance, so they prefer the private cloud deployment model. Similarly, developers are concerned about coding, and prefer the Platform as a Service (PaaS) cloud service model. The marketing and sales departments prefer a browser-based Customer Relationship Management (CRM), thus favor the Software as a Service (SaaS) model.

KEY FEATURES

The table given below highlights the key features of the multi-cloud management model.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Meaning</th>
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<tbody>
<tr>
<td>Self-Service Provisioning</td>
<td>The user can choose the cloud computing environment as per the requirement with minimal intervention from the cloud service provider (CSP)</td>
</tr>
<tr>
<td>Activity and Cost Information (Metering and Billing)</td>
<td>The users are informed about the cost and activity of each CSP</td>
</tr>
<tr>
<td>Advanced Backup</td>
<td>The users can schedule the backups by defining the retention period, whether daily, weekly, or monthly</td>
</tr>
<tr>
<td>Schedule Tasks</td>
<td>The users can plan their tasks to be performed at defined intervals</td>
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A multi-cloud management platform, such as DoubleHorn’s BetterClouds, provides control over all these features in a unified interface.

CLOUD SERVICES BROKERAGE (CSB)

End users in various industries have rapidly adopted cloud-based services owing to several benefits, such as scalability, flexibility, faster deployment, and reduced capital & operating expenditure. Although cloud services have enabled users to improve their productivity, efficiency, and accessibility over time, managing these varied cloud service models has become increasingly complex. As companies subscribe to services from different CSPs to save cost, it becomes increasingly difficult for organizations to manage their scattered IT services at regular intervals. Thus, the need for intermediaries to manage all the complexities related to cloud computing and service integration emerged. Today, CSBs have eliminated the burden on the IT administrators of a company to
manage cloud services from different vendors. CSBs provide a self-managed enablement platform to cloud service users. CSBs offer a proven one-stop solution for all companies adopting cloud computing and manage all their responsibilities ranging from advising for suitable cloud services to complexity management, thereby providing a unified and quality view to its users.

**FIGURE 1  CLOUD SERVICES BROKERAGE FRAMEWORK**

The figure given above highlights the framework of the CSB model. The framework comprises various CSPs providing Infrastructure as a Service (IaaS), SaaS, and PaaS through the different cloud deployment models (public, private, and hybrid). Businesses are demanding transparency in costs and better responsiveness to new opportunities. With the growing reliance of businesses on IT, the demand for outsourcing this IT burden to cloud vendors is increasing as organizations need to focus more on their core functions. Additionally, cloud services are very cost-effective compared to traditional on-premise IT solutions. Hence, it has become increasingly important for CSPs to deliver a unified experience for a wide variety of cloud services to their customers, channels, and employees.

The growing demand for cloud technology calls for effective cloud management capabilities. CSB providers are the enablers of efficient cloud service management. The CSB vendors, such as DoubleHorn, offer these cloud management capabilities through a software platform known as a ‘multi-cloud management platform’ for business operations. Multi-cloud management platforms enable different types of CSBs, such as internal and external brokerage. The internal brokerage model involves the consumption of the broker’s services in-house (among employees and stakeholders). For example, defense and government enterprises prefer internal brokerage enablement to transform their business models and improve employee efficiency and user quality. On the other hand, an external brokerage model enables TSPs (Telecommunications Service Providers), IT distributors, cloud computing vendors, ISVs (Independent Software Vendors), and hosting providers to expand their offerings by integrating their own offerings (applications, services, and others) into the CSB platform to increase their profitability and customer base.

*Source: MarketsandMarkets Analysis*
3. MULTI-CLOUD MANAGEMENT MARKET

MULTI-CLOUD MANAGEMENT MARKET ECOSYSTEM

The figure given below highlights the multi-cloud management platform ecosystem. This ecosystem comprises CSPs, the multi-cloud management platform, and the end users. The multi-cloud management platform includes dashboards, services, reporting, design, catalog, and marketplace. These capabilities are further integrated with the cloud services offered by the CSPs. Multi-cloud management platforms enable the end users to easily manage and deploy workloads on multiple clouds, avoid vendor lock-in, reduce cost, and increase overall productivity.

FIGURE 2 DOUBLEHORN’S MULTI-CLOUD MANAGEMENT PLATFORM ECOSYSTEM

Source: MarketsandMarkets Analysis

CURRENT DEVELOPMENTS AND TRENDS

Most CSPs are moving towards a multi-cloud environment to extend connection to cloud platforms for users. Currently, only a few companies have adopted a multi-cloud strategy for their businesses. However, many enterprises are expected to build their multi-cloud strategy by the end of 2016. The market size, growth, and key trends in the multi-cloud management market space are given below:

- It is expected that more than 65% of enterprises will utilize two or more cloud services from the major CSPs in the next two to three years.
- The cloud brokerage enablement market is expected to grow from USD 1.315 billion in 2016 to USD 3.162 billion by 2021 at a Compound Annual Growth Rate (CAGR) of 19.2% during the forecast period.
- It is predicted that more than 60% of enterprises will enter into business with smaller CSPs having innovative offerings. This shows that most of the enterprises will adopt the multi-cloud management platform from the key innovators in the cloud market.

- Around 80% of mid-sized businesses and large enterprises are expected to adopt multiple clouds for their requirements within five years.

- Organizations need access to additional cloud computing capabilities quickly, easily, and inexpensively. This ensures a rise in demand for cloud marketplaces, ultimately accelerating the cloud brokerage enablement market.

- Trends in growing cloud marketplaces around the world will be fueled by the rapidly increasing number of ISVs during the forecast period.

The figure given below highlights the global cloud brokerage enablement market size and growth. As mentioned above, the market is expected to grow from USD 1.315 billion in 2016 to USD 3.162 billion by 2021 at a CAGR of 19.2% during the forecast period.

**FIGURE 3** CLOUD BROKERAGE ENABLEMENT MARKET SIZE AND GROWTH, 2014–2021 (USD MILLION)

*Source: MarketsandMarkets Analysis*
USER TYPES

SMALL AND MEDIUM ENTERPRISES (SMEs)
SMEs are defined as entities with less than 1,000 employees. Many SMEs have adopted the SaaS model primarily due to its low cost and reduced complexity. As SMEs typically have limited IT expertise and/or resources, moving towards cloud services enables them to reduce infrastructure cost. However, the complexities involved in IaaS adoption have significantly hampered the growth of SMEs in the multi-cloud management market space, as many enterprises find it difficult to effectively utilize and manage multiple cloud service vendors. SMEs need to find the right cloud management platform to ensure successful cloud migration and eliminate vendor lock-in. DoubleHorn’s BetterClouds provides all the needed capabilities, allowing SMEs to easily choose and utilize the cloud services they need to drive business growth.

MID-MARKET ENTERPRISES
Mid-market enterprises are defined as entities with between 1,000 and 10,000 employees. Mid-market enterprises are expected to adopt multi-cloud management platforms at a high growth rate as they have the budget as well as the technical expertise to make such business decisions. The mid-market enterprises have realized that immediate response, quick business decisions, and customer satisfaction are the most important elements needed to expand their businesses and generate revenue. However, mid-market enterprises often have the following pressing questions when selecting a multi-cloud management platform.

- Which cloud platform is the best for the workload?
- Whom to trust to store business critical data?
- Where are vendors going to store critical data?
- What if vendors go out of business?

The BetterClouds platform provides solutions to all the above questions and the company will become a prominent vendor among mid-market enterprises in the near future.

LARGE ENTERPRISES
Large enterprises are defined as business entities with more than 10,000 employees. Large enterprises are capable of setting up their own infrastructure and are moving toward cloud-based solutions to manage their private, public, and hybrid cloud environments. Affordability and high economies of scale allow large enterprises to leverage the benefits of multiple clouds. These enterprises have the ability to invest in the latest technologies to run their businesses effectively. Companies spend a significant amount of money on adopting a suitable deployment model to save on infrastructure costs, improve security, and sustain their positions in the highly competitive market. BetterClouds enables large enterprises to significantly reduce cost in the multi-cloud environment, as workloads are migrated to multiple clouds with each cloud having its own pricing model.
4. BENEFITS, CHALLENGES, AND OPPORTUNITIES

BENEFITS

AVOIDANCE OF VENDOR LOCK-IN

The fear of vendor lock-in is often cited as a major impediment to cloud service adoption. Multi-cloud management has enabled end users to switch between different vendors and reduce dependency on a single vendor. This relative independency allows end users to negotiate with vendors for improved pricing, Service-Level Agreements (SLAs), or both. Additionally, multi-cloud management also offers flexibility in data deployment and allows end users to move their workloads to multiple clouds as per the requirement. For maximum independence, end users can adopt a multi-cloud management platform to manage complex applications over multiple heterogeneous cloud platforms. Hence, a multi-cloud management platform eliminates vendor lock-in and enables seamless migration from one vendor to another.

INCREASED AGILITY AND AUTOMATION

In this era of complex and diverse computing environments, end users are searching for smarter ways to ensure optimum utilization of resources. This search brings with it additional management complexities, thereby increasing the need for agility and automation. The implementation of a multi-cloud management platform allows organizations to achieve appropriate levels of automation with agility. In addition, the platform enables end users to gain operational and economic benefits of cloud computing through multiple automation tools, including automated backup & recovery, cross-cloud bursting, auto-scaling, auto-provisioning, and others. The automation tools provide numerous benefits such as managing multiple cloud deployment, allowing automatic recovery in case of crisis and improved disaster recovery/business continuity. Multi-cloud management enhances agility across multiple clouds, thereby improving service levels in the enterprises.

ACHIEVING THE RIGHT LEVEL OF GOVERNANCE

Policy-driven governance and regulations are critical for all organizations and must be in place to ensure efficient resource utilization as they effectively manage and protect the delivery of any IT service. The governance policies and regulations allow role-based allocation of IT resources governed by cost, capacity, and business rules. Moreover, compliance monitoring allows end users to protect the virtualized workload with the required compliance policies. There is an increasing need to define an effective governance process around the management of data while considering regulations related to the usage and storage of data. To achieve the right level of governance, end users can use the multi-cloud management platform as it enables direct access controls and resolves governance issues such as encryption, financial controls, logging & auditing, and Application Programming Interface (API) integration. Furthermore, the multi-cloud management platform also offers a seamless flow of information between cloud environments and a business-friendly IT landscape.
MULTI-CLOUD MANAGEMENT

CHALLENGES

LACK OF DATA SECURITY
Maintaining privacy and confidentiality of organizational data is one of the major challenges for organizations. Hence, some companies are reluctant to move their data to the cloud and are still using the on-premises deployment model. Even though cloud adoption has grown over time, achieving security, scalability, and interoperability have always been major challenges. These challenges are further affecting the potential of the cloud vendors. Moreover, natural or man-made disasters pose a threat for data centers, and the loss of internet connectivity may bring the entire process to a standstill. According to a research study, it was concluded that in 2015, around 45% of the data centers in the United Kingdom suffered from natural disasters. Thus, cloud processes need to be monitored continuously to minimize risks and improve security features.

COMPLEXITIES IN REDESIGNING THE NETWORK FOR CLOUD
The redesigning of networks from on-premises solutions to the cloud requires high initial investment, which is difficult, especially for SMEs who may have limited budgets and resources. Moreover, many enterprises have found the upgrade to cloud deployment complex and costly. Enterprises need to take care of a number of issues, along with network architecture, to accommodate their cloud infrastructure set-up. It is very difficult to achieve visibility, measure performance, and manage workloads across multiple cloud deployment models. Complexity is the biggest challenge in the multi-cloud environment due to the environment’s deployment structure and the strategies required for building and managing multi-cloud environments.

LACK OF EXPERTISE AND MANAGEMENT OVERHEAD
Multi-cloud management requires a high level of expertise to determine when, where, why, and what needs to be moved to cloud. Most enterprises lack the expertise to decide on the cloud-based environment as there are multiple clouds available for selection. This results in increased overall management overheads, investment in VPN connections, and monitoring. Moreover, many enterprises, especially SMEs, are not aware of the multi-cloud management concept and its benefits.
OPPORTUNITIES

TRANSITION FROM ISV TO SAAS PROVIDER

Most of the on-premises vendors are moving towards a cloud deployment model to reduce IT costs and offer cloud-based solutions and services. Virtualization and the cloud are the needs of the hour to sustain in this competitive market; hence, ISVs are transforming themselves from software developers to software providers. This provides tremendous opportunity for the end users to choose cloud services from different CSPs as per their requirement. Customization of service and flexibility is attracting more customers to adopt cloud services on a larger scale. The service providers are now trying to enter the multi-cloud management market space and are implementing, maintaining, and offering support for multiple cloud products, simultaneously.

SIGNIFICANT GROWTH IN HYBRID CLOUD ADOPTION

Hybrid cloud is projected to have the maximum market share among the deployment models as it provides the features of both cloud services and on-premises. The market size of the hybrid cloud segment is expected to grow from USD 33.28 billion in 2016 to USD 91.74 billion by 2021, at a CAGR of 22.5% during the forecast period. Key trends that are expected to manifest themselves in the hybrid cloud include demand for integrated DevOps, higher adoption of open source solutions, and increased emphasis on operational governance & security management. Additionally, the hybrid cloud deployment model helps organizations to efficiently transfer their workloads from on-premises and different cloud environments to a unified platform. It is important for companies to implement hybrid cloud to enjoy the flexibility of switching between clouds, and have the required economies of scale to gain a competitive edge over other companies. Due to the significant growth in the adoption of hybrid cloud, it is also expected that enterprises will soon adopt the multi-cloud management platform.

HIGH ADOPTION RATE IN THE SMEs

Today, there are more than 150 million SMEs across the globe that provide opportunities worth billions of dollars to the cloud industry. The SMEs are moving their business communication and applications to virtual IT and cloud-based solutions. This has enabled them to develop and deploy applications on cloud that a user can access in a “pay-per-usage” type of model. The pay-per-use model is a type of payment structure in which the customers have access to unlimited resources, and pay only for what they actually use. SMEs are inclined towards having maximum control over their data and infrastructure in the cloud, globally. For this, they are keen to utilize the benefits of multi-cloud management for greater security and access of their data.
5. BETTERCLOUDS PLATFORM

FEATURES

The figure given below highlights and provides detailed explanation on the features of BetterClouds, DoubleHorn’s multi-cloud management platform.

FIGURE 4 BETTERCLOUDS FEATURES

Source: Company Website

PLAN

The BetterClouds plan feature offers the following benefits:

- Complete design of use cases to enable easy and fast migration of existing applications on cloud
- Finding the most suitable configuration of various cloud services provided by different CSPs to offer the best possible solution
- Explains the best possible solution depending on the application requirement in the enterprises through a high-level architectural framework
- Addresses scalability, load, security standard, storage needs, authentication needs, and sensitivity needs of enterprise applications
- If an existing application is migrated to cloud, the plan feature offers enterprises the flexibility to change vendors and platforms, without incurring additional cost

COMPARE

The BetterClouds compare feature offers the following benefits:

- Provides an integrated user interface for comparison of available cloud services
- As different CSPs have their own sets of pricing models, DoubleHorn's compare feature lists out the features that would affect the pricing of various cloud services
MULTI-CLOUD MANAGEMENT

- Provides a consolidated catalog of numerous CSPs and organizes products and services offered in a very simple manner
- Outlines the specifications of each service along with estimated monthly expense

CASE STUDY: $A financial institution uses multiple cloud services from a single CSP. As the CSP offers reasonable pricing to its users using multiple cloud services, the financial institution is unable to compare the capabilities of the different cloud services. The financial institution mainly has concerns regarding data security and complexities involved in managing multiple vendors. DoubleHorn’s multi-cloud management platform provides the financial institution flexibility to avail the best cloud services from multiple CSPs. Furthermore, the company can also track the usage, optimize cost, eliminate vendor lock-in, and gain visibility of each cloud service from multiple cloud providers along with improved pricing and defined SLAs.

BUY

The BetterClouds buy feature offers the following benefits:

- A unified platform for comparing and provisioning services from multiple cloud providers
- Purchased and/or provisioned resources are displayed on the dashboard which includes technical information, monitoring alerts on systems, and overall finances of the user
- Immediate provisioning of resources after purchase

MANAGE AND CONTROL SERVICE

The BetterClouds manage and control service feature offers the following benefits:

- The monitoring dashboard provides a unified platform for users to view all the information related to all of their cloud products
- Provides a common platform to access all the critical and warning alerts on the system
- The users have an option to acknowledge the alert as well as escalate the alert
- Start, pause, terminate and schedule services
- Helps in tracking critical events through devices alert history

CASE STUDY: 🧑‍⚕️A large pharmaceutical company used multiple cloud services from different CSPs to speed up the time it takes to bring new pharmaceutical drugs to market. The applications were deployed on each of the cloud services as per the requirement for better control and usage. However, the company realized that a few of the cloud services are not being utilized efficiently while the cost remained fixed. With DoubleHorn’s multi-cloud management platform, the company was able to reduce its cost significantly by transferring the workload to multiple clouds from the underutilized cloud. In addition, the company was also able to gain the maximum utilization of other cloud services from different CSPs.
GOVERN AND CONTROL COST
The BetterClouds govern and control cost feature offers the following benefits:

- The dashboard gives a snapshot of the services that are purchased and provisioned by the user. The technical dashboard provides information about the actual activities going on in the cloud, such as CPU utilization, disk operations, network operations, and others. The monitoring dashboard acts as an alert notification board on the user's application system. The financial dashboard provides information about the current and forecast expenditure for the user-provisioned services.
- After purchase, BetterClouds' simplified billing and reporting capabilities enable the users to understand, govern, control, and optimize cost.

CASE STUDY:
A retail company chooses a CSP to collect and store data. The information is then moved to a private cloud, depending on the criticality of the data and remaining information is then moved to a public cloud. Now, the company has its workload on two or more clouds from a single CSP. Similarly, the company will be availing the services from multiple CSPs for different workloads, which further facilitate the retail company to manage multiple clouds simultaneously. With DoubleHorn's multi-cloud management platform, the company was able to reduce the provisioning time of managing multiple clouds, automate deployment, gain visibility into usage, and optimize costs.

REPORTING
The BetterClouds reporting feature offers the following benefits:

- The financial and technical reporting capabilities help in creating and monitoring built-in reports.
- The reporting feature provides the ability to monitor and forecast, through reporting aspects such as custom and built-in reports.

DIFFERENTIATORS
Following are the key differentiators of BetterClouds when compared with other multi-cloud management platform providers.

- BetterClouds provides visibility, availability, security, and assurance that organizations require.
- BetterClouds has enabled the enterprises to design, compare, implement, monitor, and manage various cloud services from multiple cloud providers.
- BetterClouds provides seamless integration, data security, and real-time monitoring capabilities.
- Multi-cloud management is still an untapped market and BetterClouds has already introduced its platform which is expected to gain a significant traction in the market.
- BetterClouds is the only company in the multi-cloud management market space offering more than 50 different types of reporting capabilities, along with customization.
6. CONCLUSION

Multi-cloud is a solution where multiple clouds from different providers are used for separate tasks. To automate the task and optimize cost, enterprises need a robust multi-cloud management platform. The rising need for different applications is driving the adoption of multi-cloud management platform among end users. With the availability of multi-cloud management platform, enterprises can significantly reduce their dependency on a single provider. Enterprises deploying multiple clouds can have better control on pricing and can better utilize the latest technology developments. In the past few months, companies have realized the importance of the multi-cloud management platform and are rapidly entering the market due to the huge potential for growth in the coming years.

DoubleHorn is one of the prominent vendors operating in the CSB and multi-cloud management space. The company offers a multi-cloud management platform and cloud brokerage services to enterprises, as well as to the government and education sectors. The company focuses on delivering better prices, better coverage, better performance, better service, and BetterClouds to enterprises through its multi-cloud management platform. In this day and age, organizations are expected to build their business models around cloud services and many seek the best cloud management platform to suit their particular business, technology requirements, and goals. DoubleHorn’s multi-cloud management platform, BetterClouds, makes the task easier for organizations as it provides features like reporting, real-time monitoring, best pricing, optimized cost, and cloud migration services.
ABOUT DOUBLEHORN:

Austin, Texas-based DoubleHorn is a leading cloud services broker founded in 2005. DoubleHorn's multi-cloud management platform has empowered organizations with the knowledge and technology required to design, compare, implement, monitor, and manage cloud solutions from multiple cloud providers. The company's solutions combine products from the leading cloud providers and are designed to meet the emerging technology requirements of enterprises. DoubleHorn is dedicated to one enduring idea: Improving the world-changing power of clouds and we'll continue to fight for organizations who demand better prices, better coverage, better performance, better service, and better clouds.

DoubleHorn signed contracts to provide CSB, cloud assessment, and cloud Infrastructure-as-a-Service (IaaS) to the State of Texas and the State of Oklahoma.

DoubleHorn Cloud Solutions

Cloud IT: Migrate IT infrastructure securely, achieving efficiency and cost savings

Backup & DR Solutions: Highly scalable and reliable data storage solutions that enable a dependable backup and recovery

Security & Compliance Solutions: Cloud data and applications that comply with the requirements such as HIPAA, CJIS, FedRAMP, FIPS, ITAR, and FERPA

Digital Evidence Management Systems: Fully secure and compliant solutions for law enforcement

Cloud Communications & Collaboration: Cloud communications applications along with collaboration software that increase productivity and reduce cost.

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