INTRICATELY'S 2021 CLOUD MARKET

SUSTAINABILITY IMPACT REPORT

INTRICATELY

ABOUT INTRICATELY MARKET REPORTS

Intricately's data platform provides an unparalleled view into the cloud. Our cloud market reports provide insights into every cloud vertical, region, and market, helping cloud sellers identify new opportunities and accelerate their go-to-market programs.

As the authoritative source of cloud product adoption, usage, and spend data, Intricately gives cloud sales and marketing teams an unfair advantage in finding and acquiring new customers, building advanced scoring models, getting proactive notification of sales cycles, and spotting churn before it happens.

Top Cloud Sellers Rely on Intricately Data

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The direct impact of hyperscale computing can have on CO2 emissions is getting increased notice from customers, regulators, and investors and it's starting to factor into buying decisions... For advanced cloud providers, matching workloads with renewable energy availability will further accelerate their sustainability goals.

CUSHING ANDERSON | *International Data Corp*

INTRODUCTION

In 2021, companies that sell to cloud buyers across the ecosystem are prioritizing sustainability initiatives. Shareholders, customers, partners, and other stakeholders have a vested interest in how cloud providers are taking steps to decrease their climate impact and improve efficiency and sustainability as a business imperative.

Go-to-market teams are tasked with driving revenue and doing what's best for the bottom line. Yet as brand awareness grows, so does the demand to make an impact. And consumers today aren't afraid to hold organizations accountable.

In this Intricately report on Sustainability In the Cloud, we'll cover:

- The growth of the cloud and its impact on sustainability in digital infrastructure
- The growing adoption of data centers and the environmental impact of leading providers
- The sustainability strategies and market share of leading cloud providers
- Businesses with growing cloud demand, sustainability commitments, and how to sell into them

Intricately's cloud footprint data helps cloud marketing teams better understand the market and how to meet sustainability goals while increasing revenue.

Cloud computing could prevent
1 BILLION
metric tons of CO_2 emissions over
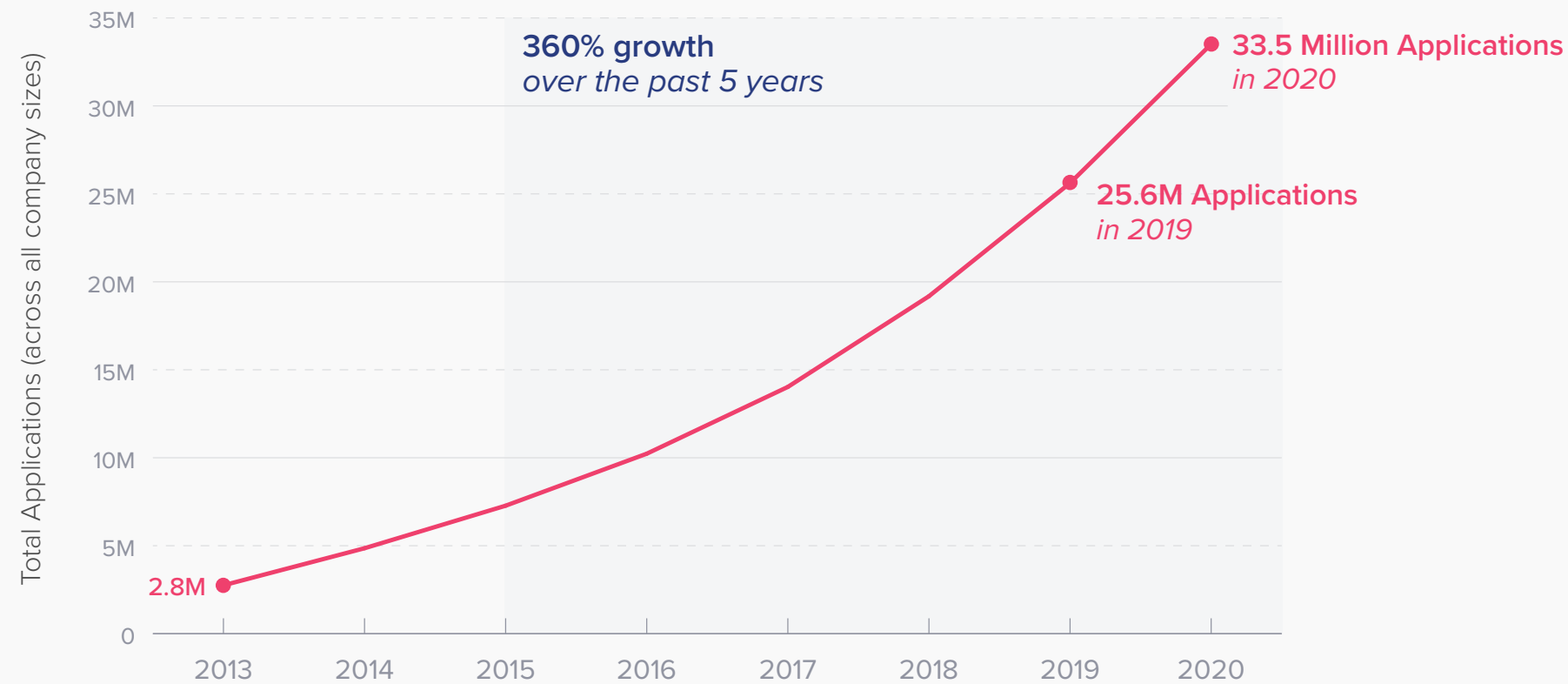## 4 YEARS

$692 BILLION
Cloud Market Size
by 2025

Source: International Data Corp
Source: Gartner Cloud Forecast, 1Q21

Global Growth of Cloud Infrastructure Market From 2013 to 2021
Cumulative Number of Applications Worldwide

360% growth
over the past 5 years

33.5 Million Applications
in 2020

25.6M Applications
in 2019

2.8M

Total Applications (across all company sizes)

35M
30M
25M
20M
15M
10M
5M
0

2013 2014 2015 2016 2017 2018 2019 2020

Source: Intricately data, April 2021

A recent study from **Lawrence Berkeley National Laboratory** projects that transitioning to the cloud would decrease the total energy consumption of standard software applications by **87%**. Another study found cloud-based operations at **Microsoft** led to average carbon emissions reductions of:

- **90%** or more for small operations
- **60%** to **90%** for medium operations
- **30%** to **60%** for large operations

Many recent studies like these prove the important role of the cloud as a catalyst for improving overall sustainability in organizations.
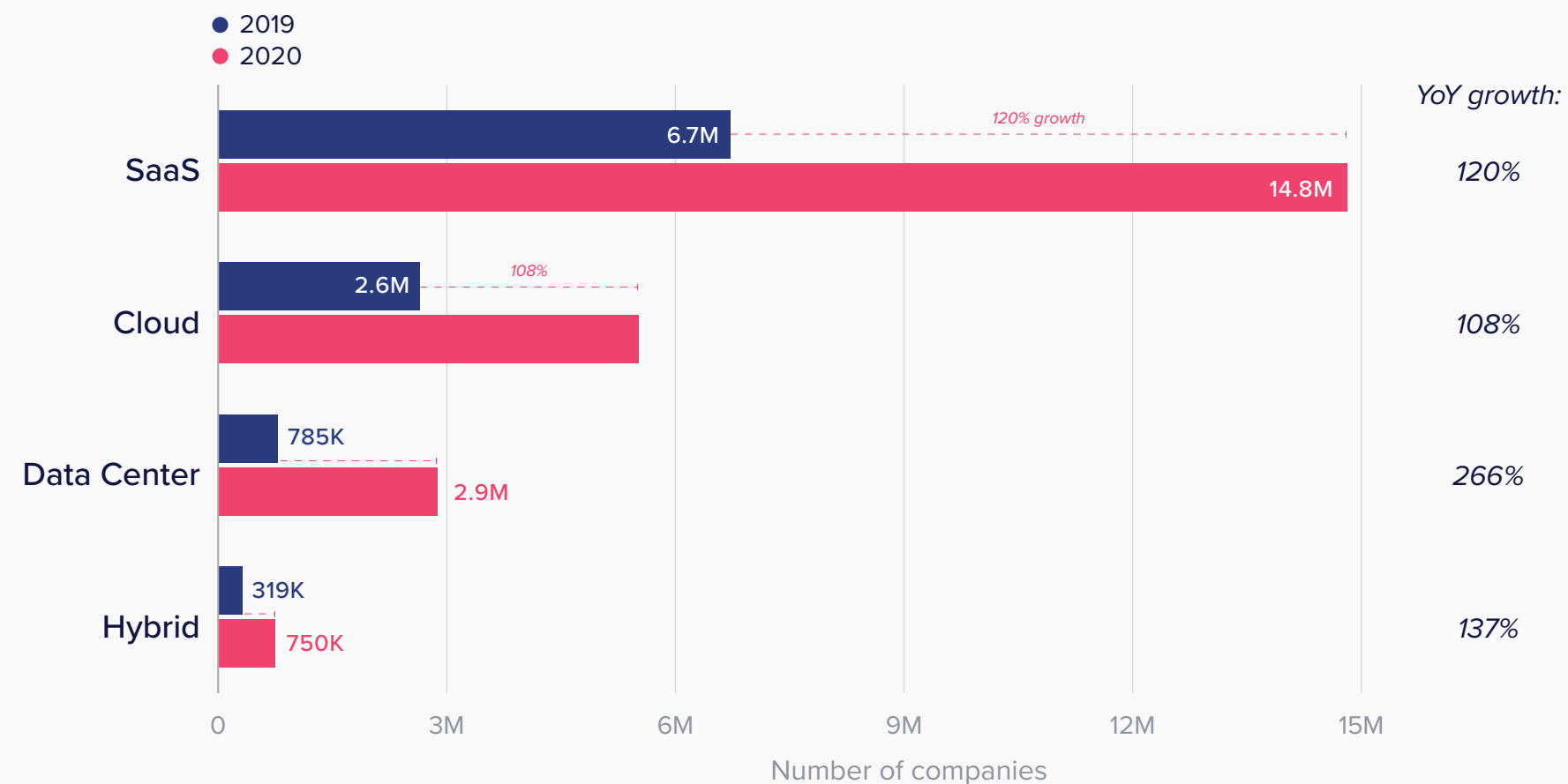
According to Intricately data, the number of cloud applications deployed worldwide grew from **25.6M** to **33.5M** from 2019 to 2020. In the past 5 years, the growth of applications deployed in the cloud was **360%.**

Intricately is the strategic partner for cloud providers looking to grow their customer base. **Contact us to learn more.**

GROWTH OF THE CLOUD IN COMPARISON TO DATA CENTERS

Hosting Environment by Company Size
Percentage of Applications by Environment Type

- 2019
- 2020

Environment	2019	2020	YoY growth:
SaaS	6.7M	14.8M	120%
Cloud	2.6M		108%
Data Center	785K	2.9M	266%
Hybrid	319K	750K	137%

120% growth

108%

Number of companies: 0, 3M, 6M, 9M, 12M, 15M

Source: Intricately data, April 2021

INTRICATELY INSIGHT

Intricately can see significant growth of the overall cloud computing market across all configuration types. While cloud and SaaS implementations led in quantity, Intricately data indicates that data center implementations saw the most significant growth (266%) YoY.
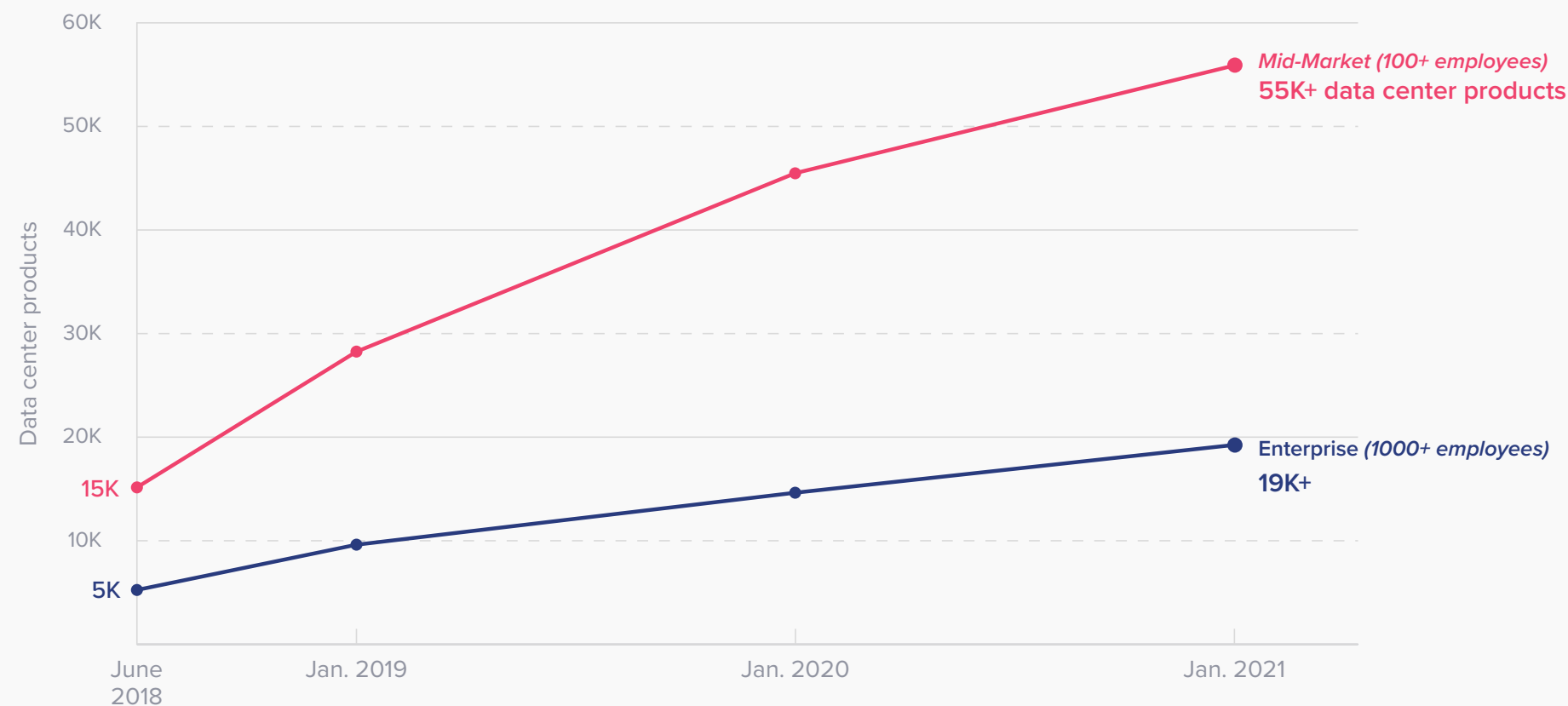
The continued growth of cloud and hybrid infrastructure models will improve the energy efficiency of these data centers over time.

Intricately can help you build a list of prospects based on their hosting environments. **Contact us.**

Adoption Rate of Data Centers, 2018 to Present

In mid-market and enterprise businesses

Mid-Market *(100+ employees)*
55K+ data center products

Enterprise *(1000+ employees)*
19K+

Source: Intricately data, April 2021

INTRICATELY INSIGHT

Intricately data indicates that mid-market and enterprise companies have adopted data center products at a growing rate since 2018. Interestingly, that growth has not led to a significant increase in energy consumption.

Recent figures estimate that the world's data centers have consumed steady levels of energy even as their adoption grew. Over 8 years, the electricity consumed by data centers worldwide remained at 1 percent.

The major force behind the improved efficiency of global data centers? Cloud computing. Large cloud data centers are outfitted with customized chips, high-density storage, customized airflow systems, and other advanced technology that increase computing power without increasing electricity.

Intricately can see the adoption, usage and spend data of cloud infrastructure, including data centers. **Learn More.**

LEADING DATA CENTER PROVIDERS' APPROACH TO SUSTAINABILITY

Data center providers who partner with Intricately have brought impressive sustainability goals to market.

DIGITAL REALTY

"

Sustainability is an integral part of our strategy to help our customers harness the power of data gravity.

It's a responsibility we take seriously — which, like with everything else at Digital Realty, includes metrics and accountability. Accordingly, I am proud to announce that we have set new, ambitious climate impact reduction targets with a goal of bringing our carbon emissions in line with a 1.5-degree climate change scenario by 2030.

"

BILL STEIN
CEO | Digital Realty

® EQUINIX

"
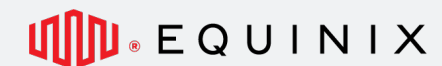
In the past year, we also continued to advance our bold sustainability agenda, again achieving more than 90% renewable coverage for our global data center energy consumption, as well as pursuing Science-based Targets and applying innovative techniques to push sustainability forward in all three regions...

Equinix recently joined the EU Climate Neutral Data Centre Operator Pact, an industry initiative to commit to EU data center carbon neutrality by 2030, to continue our momentum in climate change mitigation.

"

CHARLES MEYERS
President and CEO | Equinix

PUBLIC SUSTAINABILITY COMMITMENTS FROM CLOUD LEADERS

Several leading cloud providers have made public commitments to sustainability targets.

"AWS is committed to running our business in the most environmentally friendly way possible and achieving 100% renewable energy usage for our global infrastructure.

AWS has multiple initiatives to improve our water use efficiency and reduce the use of potable water for cooling data centers. AWS develops our water use strategy by evaluating climate patterns for each AWS Region, local water management and availability, and the opportunity to conserve drinking water sources."

CLOUD HOSTING MARKET SHARE: 44.4%

View In Intricately

"Azure has committed to focus on four key areas of environmental impact to local communities—carbon, water, waste, and ecosystems.

- **100%** renewable energy by 2025
- **Water positive** by 2030
- **Zero-waste** certification by 2030
- **Net-zero** deforestation from new construction."

CLOUD HOSTING MARKET SHARE: 10.0%

View In Intricately

"In our founding decade, Google became the first major company to be carbon neutral. In our second decade, we were the first company to achieve 100% renewable energy. By 2030, we aim to be the first major company to operate carbon free."

CLOUD HOSTING MARKET SHARE: 9.3%

View In Intricately

Intricately can help you find the right customers to further your sustainability initiatives. **Contact us to learn more.**

SELECTED COMPANIES LEADING THE WAY IN SUSTAINABILITY AND CLOUD ADOPTION

Large enterprise companies that have been leading adopters of cloud infrastructure in recent years have made tangible impacts on sustainability. Considering the rate of cloud adoption seen by Intricately data and the aforementioned studies, these companies likely saw between 30 - 60% reductions in the carbon footprint of their infrastructure.

salesforce

5-year Cloud Growth:

117%

Total est. monthly cloud spend: **$15M**
Primary cloud provider: **VIEW IN INTRICATELY**

Panasonic

5-year Cloud Growth:

75%

Total est. monthly cloud spend: **$2M**
Primary cloud provider: **VIEW IN INTRICATELY**

accenture

5-year Cloud Growth:

65%

Total est. monthly cloud spend: **$4M**
Primary cloud provider: **VIEW IN INTRICATELY**

Goldman Sachs

5-year Cloud Growth:

53%

Total est. monthly cloud spend: **$9M**
Primary cloud provider: **VIEW IN INTRICATELY**

As large enterprises like these continue to increase their spend in the cloud - as seen in Intricately - their environmental impact will grow.

Intricately can see the cloud adoption, usage and spend of any global company. **Contact us to view the cloud footprint of your prospects.**

SUSTAINABILITY AS A STRATEGY

Opportunities for cloud sellers to contribute to their customers' initiatives

Many cloud infrastructure buyers are tasked with improving sustainability from the executive level, but may not realize the impact cloud adoption can have on their initiatives. Cloud sellers who are aiming to help buyers on their path to sustainable operations could see these companies as an opportunity to partner on sustainability together.

THE NORTH FACE

- Total number of applications: **1,515**
- Est. monthly cloud spend: **$429K**
- Primary cloud provider: **VIEW IN INTRICATELY**

STATEMENT:

"

We're committed to creating the best products on earth, while working to leave the earth better for future generations.

"

_____

PayPal

- Total number of applications: **955**
- Est. monthly cloud spend: **$14M**
- Primary cloud provider: **VIEW IN INTRICATELY**

STATEMENT:

"

Paypal pledges net-zero carbon emissions by 2040" and to power all data centers with 100% renewable energy by 2023.

"

_____

spirit

- Total number of applications: 85
- Est. monthly cloud spend: **$475K**
- Primary cloud provider: **VIEW IN INTRICATELY**

STATEMENT:

"

We seek to pursue commercially viable options to improve the long-term sustainability of our business.

"

_____

GROW YOUR REVENUE BY ALIGNING WITH YOUR PROSPECTS AND CUSTOMERS' SUSTAINABILITY GOALS

Many cloud infrastructure buyers are tasked with improving sustainability from the executive level but are not aware of the impact cloud adoption can have on their initiatives. Developing and sharing sustainability commitments is critical to the trajectory of any growing cloud business. Intricately's cloud adoption, usage and spend data of cloud buyers and sellers with significant sustainability impact can be leveraged to grow your own customer base.

EVALUATE YOUR CLOUD ADOPTION STRATEGY

Understand the environmental impact of partnering with leading cloud providers
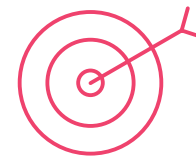
PRIORITIZE LEADS WITH THE HIGHEST PROPENSITY TO BUY

Position the cloud's sustainability benefits to leads with the highest cloud spend potential

CUSTOMIZE MARKETING MESSAGING

Leverage Intricately's cloud footprint data to craft unique offers

Intricately partners with cloud sales and marketing teams to develop the most impactful go-to-market strategies for their business. **Contact us** to schedule a demo and discover your best opportunities for revenue growth.

GET CUSTOMIZED CLOUD MARKET INSIGHTS

Intricately gives cloud sales and marketing teams an unfair advantage in finding and acquiring new customers, building advanced scoring models, getting pro-active notification of sales cycles, and spotting churn before it happens.

Our customers use the Intricately data platform to:

- Identify their ideal customer profile
- Define their total addressable market
- Implement territories and account plans for global sales teams
- Execute sophisticated marketing programs to drive growth
- Assess performance against competitors
- Prioritize account-based marketing and sales efforts

Schedule a demo to learn how to use Intricately's detailed product adoption, usage, and spend data to focus your prospecting and prioritization efforts.

CONTACT US AT:

650-600-1834

learnmore@intricately.com
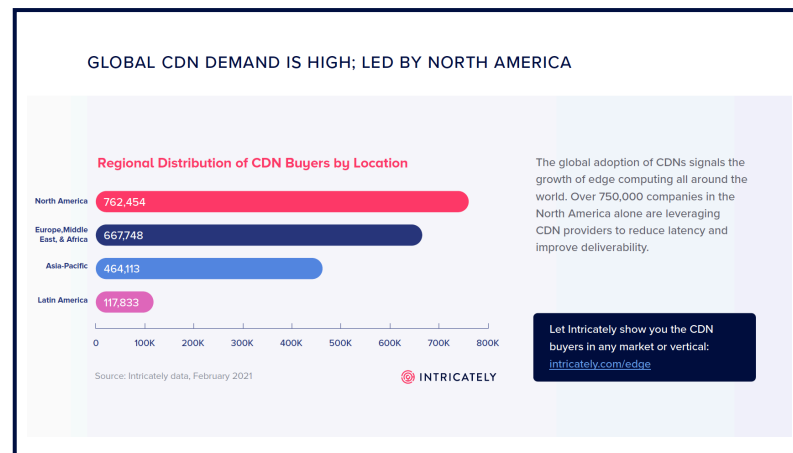
TOP CLOUD SELLERS RELY ON INTRICATELY DATA

aws   CLOUDFLARE

EQUINIX   fastly

HashiCorp   Limelight NETWORKS
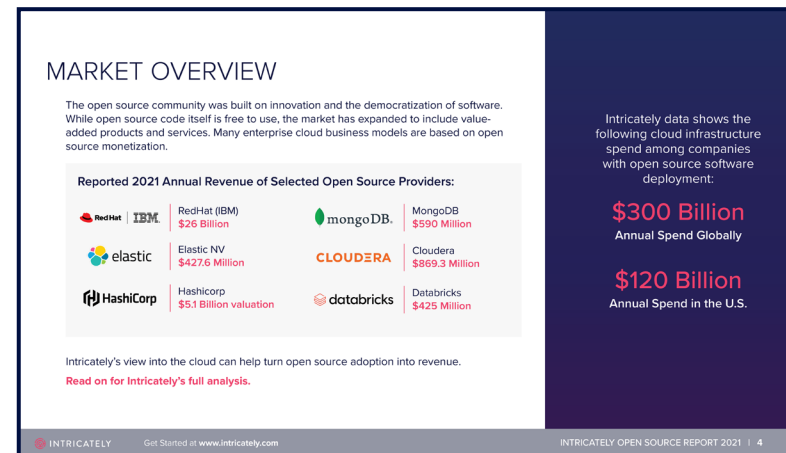
verizon✓   snowflake

LOOKING FOR MORE DATA?

Read Intricately's Full Library of Cloud Market Reports, Including:

2021 INTRICATELY CLOUD MARKET REPORTS:

State of the Edge Computing Market

Insights to Drive Revenue in an Open Source Business Model

State Of The Cloud Hosting Market