State of Application Services

2019 REPORT / FOCUS ON EMEA

Key Findings

Public cloud still most significant strategic trend as other regions turn toward big data

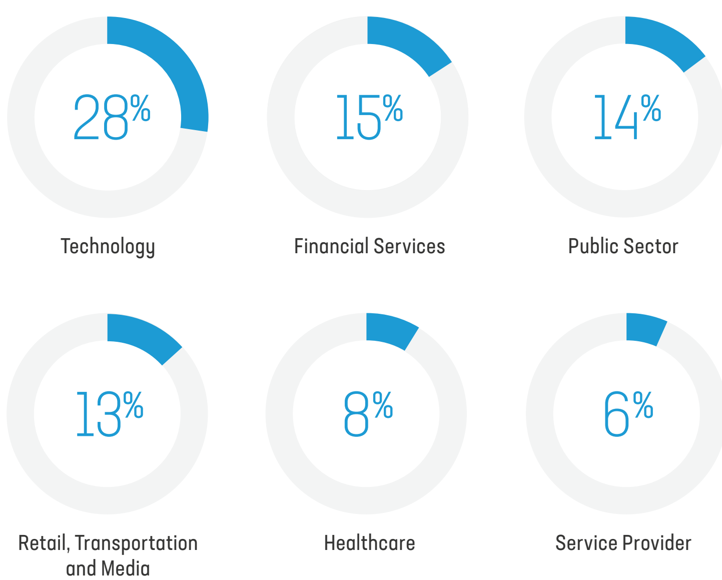
EMEA aggressively embracing modern methods and technologies to realize IT optimization but eschew self-service outside IT

Respondents in EMEA far more cynical about their ability to protect apps off-premises

Use of OpenStack and open source for automation and orchestration strong in EMEA; Ansible preference skyrockets

Global agreement on plans to deploy application services except for API gateway; EMEA is going with service mesh

FIGURE 1: EMEA RESPONDENTS BY TECHNOLOGY SECTOR *(Demographics: 220 Respondents across 54 countries)*



SOURCE: F5 STATE OF APPLICATION SERVICES 2019

TRENDS AND TECHNOLOGIES

While digital transformation continues to be a significant strategic driver globally, organizations in EMEA are aggressively embracing the shift. Three-fourths (75%) of organizations in EMEA are working on digital transformation compared to 68% of companies in other regions.

FIGURE 2: ADOPTION OF DIGITAL TRANSFORMATION STRATEGY BY REGION

SOURCE: F5 STATE OF APPLICATION SERVICES 2019

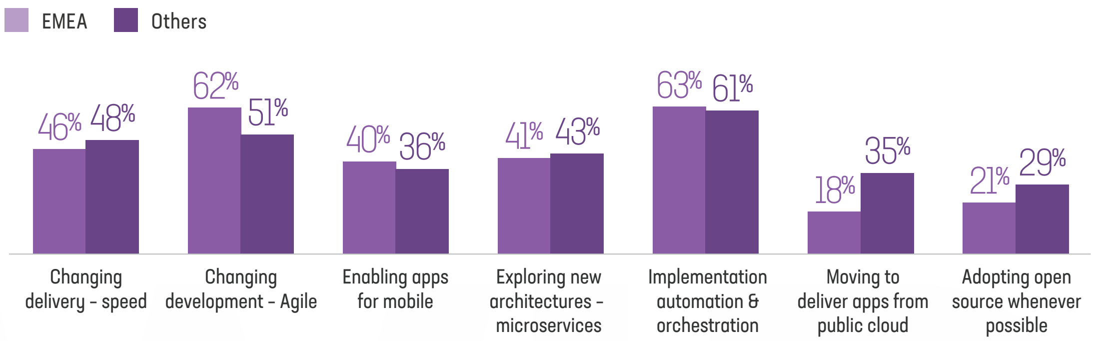
Common to all geographies is the same desire to optimize IT and business processes and enjoy employee productivity improvements from digital transformation. EMEA shows greater focus on IT optimization than other regions, with nearly three in four organizations (72%) looking to realize this benefit compared to 69% in other regions. But unlike their counterparts across the globe, companies in EMEA are not looking to offer self-service outside of IT as part of their digital transformation efforts. Nearly half (45%) say they have no plans to open up IT with self-service. Less than a third (32%) of organizations in other regions agree with this sentiment.

DIGITAL TRANSFORMATION PROJECT IN PLACE

The focus on IT optimization shows in other ways, such as how EMEA is enthusiastically embracing change to its technological underpinnings. While just over half (51%) of respondents from other regions are changing how they develop applications as a result of digital transformation, that percentage jumps to 62% in EMEA. Organizations in EMEA are also more likely than their worldwide counterparts to be enabling applications for mobile clients (40% versus 36% in other regions), but are similarly disposed toward the use of automation and orchestration.

OpenStack and open source tools for automation and orchestration remain popular—and made gains year after year. For network automation, Cisco and VMware continue to top the list. While there is universal agreement identifying Ansible as a good choice for overall automation and orchestration, more than half (52%) of EMEA respondents choose Ansible—nearly matching the worldwide adoption of the most popular choice—Python scripts.

FIGURE 3: STRATEGY AND SECURITY PRIORITIES BY REGION



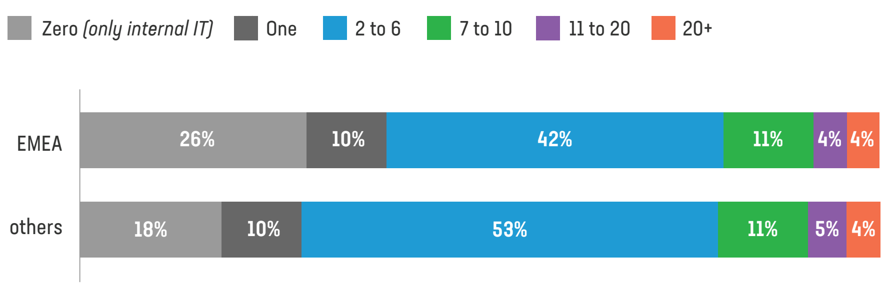
SOURCE: F5 STATE OF APPLICATION SERVICES 2019

STRATEGY AND SECURITY CONCERNS

Geographic similarities end when we look at the strategic trends driving decisions for the next two to five years.

EMEA continues its strategic focus on cloud, with public cloud (48%) capturing first place. SDN continues to be important in EMEA with 47% of the respondents identifying this as a strategic priority. Private cloud (42%) rounds out the top three. While all regions view these trends in the top five, EMEA differs from Americas and Asia Pacific in that neither big data analytics nor real-time threat analytics made it to the top three. This could potentially be a result of GDPR and a resulting hesitancy to mine customer data.

FIGURE 4: EMEA LESS LIKELY TO CHOOSE MULTI-CLOUD STRATEGY



SOURCE: F5 STATE OF APPLICATION SERVICES 2019

Firms in EMEA are less likely to have adopted a multi-cloud strategy, and more likely to maintain a zero cloud environment than their worldwide counterparts. Only 42% of EMEA respondents report a 2 to 6 cloud strategy, compared to 53% in other geographical regions. More than one-quarter (28%) of all organizations in EMEA avoid cloud in any form but SaaS, compared to 18% in other regions.

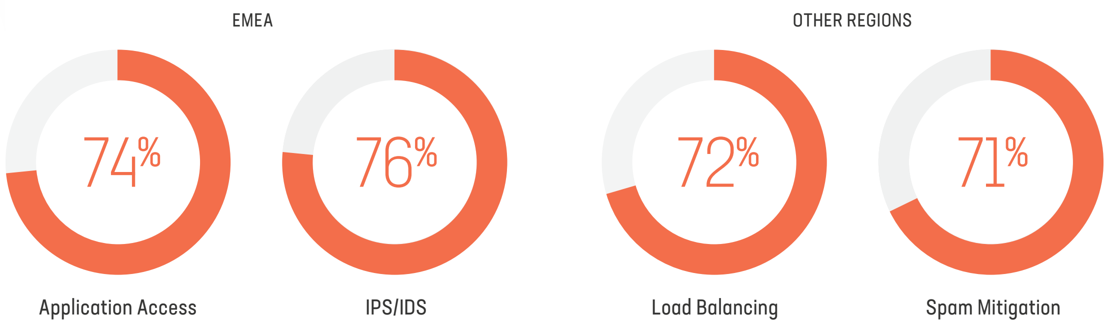
The less-than-enthusiastic adoption of—and lack of plans to deliver apps from—the public cloud by organizations in EMEA may be due to security concerns, as reflected by their confidence in protecting applications. Respondents in EMEA are far more cynical about their ability to protect applications off-premises than counterparts in other localities. More than one-third (35%) of EMEA respondents were less confident in withstanding an application layer attack in all three off-premises domains: SaaS applications, public cloud, and colocation data centers. Conversely, their confidence peaked for on-premises security, with 58% more confident when it comes to protecting apps in on-premises, private cloud. Stricter regulation and attention to consumer privacy in EMEA is certainly a factor in the region's caution with respect to public cloud.

APPLICATION SERVICES

Organizations in EMEA are executing strategically with respect to their application service deployments and plans.

There is general agreement across all localities on the top five application services deployed today. Network firewall, anti-virus, and SSL VPN dominate the top five both worldwide and within EMEA. In EMEA, application access (74%) and IPS/IDS (76%) round out the list while in other geographies, load balancing (72%) and spam mitigation (71%) win top spots.

FIGURE 5: TOP-RANKED APPLICATION SERVICES BY REGION *(Application service priorities differ by region)*



SOURCE: F5 STATE OF APPLICATION SERVICES 2019

Across the globe, organizations plan to deploy DNSSEC, HTTP/2 Gateway, IoT gateway, and SDN gateways. In EMEA, the top five to-be-deployed list is filled out with service mesh (28%) while other localities are planning to deploy API gateways (27%). These technology choices are being driven by movement toward modern application architectures, cloud environments, and containers.

As one might expect with its less enthusiastic embrace of cloud, firms in EMEA were far more likely not to use any application services in the public cloud than their contemporaries. Across all application services we track, more than half of EMEA respondents indicated they did not deploy them in public cloud. Those who do choose to deploy security-related application services more often than others. Unlike other regions, the top five application services used for "most production apps in public cloud" by orgs in EMEA included web application firewall (30%) and SSL VPN (30%).

While EMEA responses align with the global results on the criticality of security services (rating it the worst thing you could deploy an app without), EMEA remains more concerned with availability (25%) than other regions (20%), and less concerned about performance and mobility.