

To: Juniper SDN & NFV

Re: Country Memo – Germany

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Below, we have compiled data from our IT Decision Makers and Business Decision Makers in Germany in the same order as the Pitch Guide. For easy reference, we've included the survey question number and **bolded** interesting instances where the stats differ from the overall story.

**Need for Speed: Global Study Finds IT Can Be a Barrier to Innovation**

- 35% of ITDMs and 22% of BDMs expect a new disruptive technology, product or service to be introduced into their industry within two years or less. **That's significantly fewer ITDMs compared to global ITDMs overall (55%). Additionally, significantly fewer BDMs expect this compared to BDMs overall (50%).** Q1
- 82% of ITDMs and 87% of BDMs believe their primary products and services currently have a significant competitive advantage. Q2
- 60% of BDMs and 42% of ITDMs admit it would take them a year or more to respond with a better product or service. Q3
- 66% of ITDMs, compared to 69% of BDMs, believe their IT infrastructure would be an obstacle if faced with a competitor with a product or service drastically superior to theirs. Q4
- 20% of BDMs and 13% of ITDMs believe that more than half of their company's IT workforce doesn't have the skills they'll need for their role five years from now. Q7
- 83% of BDMs and 76% of ITDMs admit their organizations would perform better if their current C-Suite were more tech savvy. Q8
- 65% of BDMs admit they circumvented IT staff in 2015 because they could not offer the capabilities or responsiveness they needed for a company initiative. Q6
- 75% of BDMs and 68% of ITDMs are excited about the opportunities network and IT automation creates for their companies. Q18
- SPOTLIGHT: 98% of ITDMs and BDMs believe there are forces holding IT back. And they agree that the top 3 issues include budget, legacy network technology and security and compliance. Q5

**The IT Decision Maker's Perspective on Network and IT Automation**

- 99% of ITDMs report enterprise capabilities gained by SDN. These include cloud interconnect capabilities (52%), virtual data center capabilities (48%), security automation capabilities (38%) and network visibility (38%). Q11
- SPOTLIGHT: 92% of BDMs and 86% of ITDMs agree that network and IT automation is essential for their company to be competitive in the future. Q19
- 99% of ITDMs at companies with NFV report that capabilities have increased. This is led by gains in virtual security (45%), network analytics (41%) and virtual routing (41%). Q15
- SPOTLIGHT: 66% of ITDMs believe, in general, that the C-Suite at their company does not view the network as vital to company success. Q17