# Your response

| Question | Your response |
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| **Question 2.1: How do you see developments in the international context impacting the provision of cloud services in the UK?** | *Is this response confidential? N*<br>*Three dimensions:*<br>***Supply***: *Market leaders offering on-platform databases and other platform ecosystem components seek to lock in customers & lock out competitors by raising switching costs*<br>***Demand***: *The need to adhere to international regulations (e.g., GDPR) limits customers to suppliers capable, alone or with partners, of supporting solutions to meet these requirements.*<br>***Regulation/business pressure:*** *concentration risk, not just in financial services, places a requirement on suppliers to 'play nicely', which is at odds with competitive pressure where there are very large players owning the full stack.* |
| **Question 4.1: Do you agree with the scope of the market study?** | *Is this response confidential? N*<br>*Yes, broadly, but see caveats* |
| **Question 4.2: Are there other ways to those listed in paragraphs 4.11 to 4.14 in which customers use cloud services, and factors which determine their cloud usage, that we should examine?** | *Is this response confidential? N*<br><br>*Large enterprises are already pursuing multi-cloud strategies to avoid concentration risk (mandatory in Financial Services).*<br>*So, anything that makes switching or cross-cloud operation difficult is to the detriment of such consumers.* |
| **Question 4.3: Do you agree that the features set out in paragraph 4.15 are the most important features for customers when choosing cloud services?** | *Is this response confidential?  N*<br><br>*As noted, what is not considered here are the barriers to switching and multi-cloud operation* |
| **Question 4.4: Is our characterisation of how cloud services are sold and buying patterns correct at paragraphs 4.16 to 4.18? Are there other methods?** | *Is this response confidential? N*<br><br>*Looks reasonable* |
| **Question 4.5: Do you agree with our characterisation of competition for different types of services and customers? Are there any other aspects where competition may vary?** | *Is this response confidential? N*<br><br>*Agree. Specifically, there are concerns where hyperscalers compete with ISVs (delivering into Platform as well as Applications layers)* |
| **Question 4.6: What are your views on our characterisation of cloud ecosystems?** | *Is this response confidential? N* |

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| | *We regard this as a very important part of your study. There is in Cloud services, as in any comparable industry, the opportunity for major players to leverage their stack (ecosystem) to compete unfairly with ISVs who deliver only part of that stack* |
| **Question 4.7: Do you agree with our proposed approach for considering the dynamics in cloud infrastructure services competition, and what do you think are the most important issues to examine?** | *Is this response confidential? N*<br><br>*Agree* |
| **Question 4.8: Do you agree we should examine cloud ecosystem competition? How do you see cloud ecosystems currently developing, including around core areas set out in paragraphs 4.40 and 4.45?** | *Is this response confidential? N*<br><br>*As a data management innovator in the platform layer, we see the ecosystem market not just as a way hyperscalers and other very large platform vendors compete with each other, but as something they weaponise to unfairly compete with best-of-breed innovators within the ecosystem. They pay only lip service to open APIs (e.g. PostgreSQL) and service definitions (e.g. Distributed SQL), which can result in consumer lock-in/inflated switching cost* |
| **Question 4.9: Do you have any concerns regarding any conduct or activities of any provider(s) that may adversely affect market dynamics now or in the future?** | *Is this response confidential? N*<br><br>*Yes, see previous answer (Q 4.8)* |
| **Question 4.10: Are there any remedies that you believe we should investigate further to mitigate some of the potential risks we've identified in this document or concerns you have with the market?** | *Is this response confidential? N*<br><br>*If you were to take a strong stance on the implications of vendor activities for switching costs (expressed in monetary terms, risk, and effort), we believe this would highlight the degree to which current practices harm consumer choice.*<br>*We believe this implies a degree of drill down into ecosystem components and interoperability relating to such subjects as open-source software and public APIs.* |