Hybrid at Hyperspeed: Cloud Strategy for the New Reality of Government

Underwritten by

NetApp®

Introduction

In light of the pandemic, government agencies adopted **hybrid cloud environments at unprecedented speeds**. But now, agencies must build a strategic foundation for long-term success.

So, what challenges are government leaders facing as they reexamine their hybrid cloud strategies? What steps are they taking to successfully optimize performance, secure systems, control costs, and manage data?

MeriTalk surveyed **300 Federal, state, and local IT leaders** to explore the challenges and opportunities of hybrid cloud environments within the new reality of government.

Executive Summary

Federal, state, and local governments are adopting hybrid cloud at unprecedented speeds:

85% of Federal and SLG IT managers say the COVID-19 pandemic amplified the importance of migrating to a hybrid cloud environment

67% say the pandemic accelerated their organization's hybrid cloud adoption by a year or more

But, strategies are struggling to keep up:

Only **30%** say their organization's hybrid cloud strategy has been able to keep pace with accelerated adoption due to the COVID-19 pandemic

Biggest challenge? **Managing/securing data** across environments; **75%** wish their organization would have constructed a more thoughtful data strategy before migrating

IT leaders are taking steps to improve data strategies and optimize performance, but more work is needed:

Initial steps include **prioritizing sensitive data**, **improving continuous monitoring capabilities,** and **balancing workloads** for private and public cloud
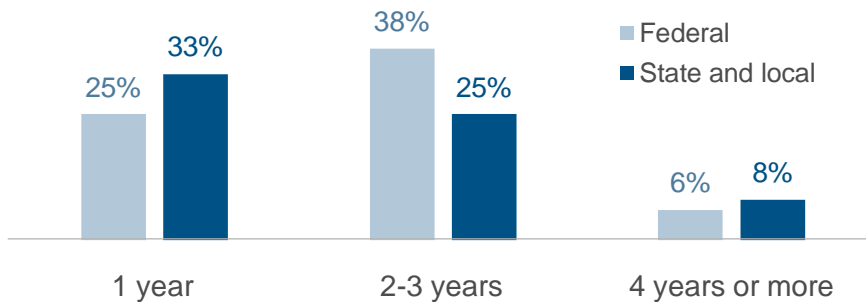
Going forward, IT leaders recommend more comprehensive **strategies**, **training**, and **collaboration** to get the most out of hybrid cloud environments

Hybrid Accelerates

85% say the COVID-19 pandemic *amplified the importance* of migrating to a hybrid cloud environment

67% say the pandemic *accelerated* their organization's hybrid cloud adoption by a year or more

By how much, if at all, has the COVID-19 pandemic accelerated your organization's hybrid cloud adoption?

- Federal
- State and local

	1 year	2-3 years	4 years or more
Federal	25%	38%	6%
State and local	33%	25%	8%

TAKEAWAY
Time Warp

Strategies Fall Behind

Stagnant hybrid strategies struggle to keep pace with the new reality of government

While **77%** of public sector organizations have a **formal hybrid cloud strategy**

Only 30% feel their strategy has **kept pace** with accelerated hybrid adoption due to the COVID-19 pandemic

T A K E A W A Y
Back to the Drawing Board

ROI Challenges

61% of Federal and **57%** of state and local IT managers feel their organization is ***not getting the most*** out of its hybrid cloud investments
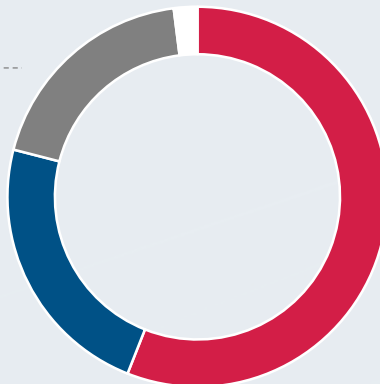
What is the **single biggest challenge** of hybrid cloud?*

19%
Justifying the investment

23%
Migrating to cloud

56%
Managing and securing data across environments

T A K E A W A Y : Focus on Empowering Data

*Remaining respondents selected unsure

Tactical Gaps

75% wish their organization would have constructed a **more thoughtful data strategy** before migrating to hybrid cloud

When designing a hybrid cloud strategy, few IT managers considered:*

- *How to make policies cohesive between the cloud, edge, and core (31%)*

- *How frequently teams need to access their data (34%)*

- *How clearly teams can see and use their data (35%)*

- *What shared responsibilities should look like (35%)*

- *What the acceptable risk is (38%)*

- *What the best environment for each individual workload is (39%)*

*Respondents asked to select all that apply

Top high-level considerations:*

Security **(86%)**

Optimization and performance **(82%)**

Data stewardship and management **(79%)**

Cost-control **(72%)**

*Percentage who rated each very or extremely important

TAKEAWAY
Ask Hard Questions

Securing Systems

Despite gaps in strategy, organizations are making progress. What steps has your organization taken to **secure systems** in hybrid cloud environments?*

Federal:

#1 Improved continuous monitoring capabilities **(48%)**

#2 Improved consistency between on-premises and cloud security **(41%)**

#3 Increased information sharing **(35%)**

State and Local:

#1 Improved continuous monitoring capabilities **(39%)**

#2 Implemented modern Identity, Credential, and Access Management (ICAM) **(38%)**

#3 Improved consistency between on-premises and cloud security **(35%)**

T A K E A W A Y
CDM and Consistency

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*Respondents asked to select all that apply

Optimizing Performance

What steps has your organization taken to **optimize performance** in hybrid cloud environments?*

Federal:

#1 Implemented cloud monitoring tools **(44%)**

#2 Balanced workloads for private and public cloud **(39%)**

#3 Partnered with a hybrid cloud specialist **(37%)**

State and Local:

#1 Balanced workloads for private and public cloud **(41%)**

#2 Avoided unnecessary data transfers **(38%)**

#3 Partnered with a hybrid cloud specialist **(35%)**

TAKEAWAY
Monitor and Balance

*Respondents asked to select all that apply

Managing Data

What steps has your organization taken to **manage data** in hybrid cloud environments?*

Federal:

#1   Maintained in-house data storage for sensitive data **(48%)**

#2   Implemented data redundancy across multiple cloud providers or data centers **(43%)**

#3   Invested in a robust data management architecture **(41%)**

State and Local:

#1   Maintained in-house data storage for sensitive data **(46%)**

#2   Evaluated data and applications assets **(39%)**

#3   Implemented data redundancy across multiple cloud providers or data centers **(38%)**

TAKEAWAY
Reduce Risk with Redundancy

*Respondents asked to select all that apply

Controlling Costs

What steps has your organization taken to **control costs** in hybrid cloud environments?*

Federal:

#1   Optimized existing use of cloud **(40%)**

#2   Used automation to monitor and optimize spending **(35%)**

#2   Migrated more workloads to the cloud **(35%)**

#2   Partnered with a hybrid cloud specialist **(35%)**

State and Local:

#1   Used automation to monitor and optimize spending **(35%)**

#2   Rightsized cloud infrastructure **(33%)**
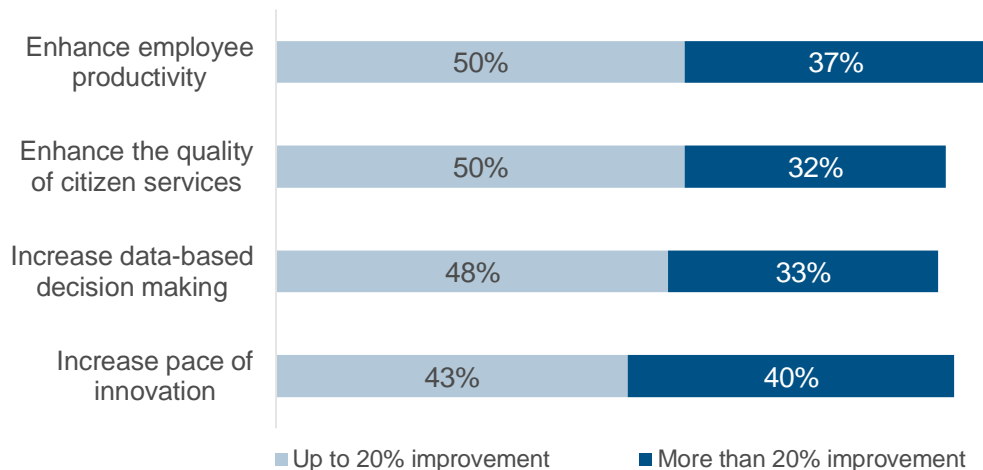
#2   Optimized existing use of cloud **(33%)**

TAKEAWAY
Optimize and Automate

*Respondents asked to select all that apply

Mission Impacts

84%

of public sector hybrid cloud users report improvements in their ability to meet the mission

To what extent, if at all, has hybrid cloud enabled your **ability to improve** the following?

Category	Up to 20% improvement	More than 20% improvement
Enhance employee productivity	50%	37%
Enhance the quality of citizen services	50%	32%
Increase data-based decision making	48%	33%
Increase pace of innovation	43%	40%

■ Up to 20% improvement   ■ More than 20% improvement

T A K E A W A Y: Hybrid Accelerates Productivity, Enhances Citizen Service

Best Practices

What practices would you recommend to government leaders working to expand hybrid adoption?

Federal recommendations

" *Build a **comprehensive** cloud strategy"*

" *Develop **consistency** between on-premises and cloud security"*

" *Invest in **training** your staff to stay up to date with changes in technology"*

State and local recommendations

" ***Collaborate** with a trusted partner"*

" *Improve **data security** and availability such that users should have **access** to the only data that they require"*

" *Focus more on **applications** than the infrastructure"*

T A K E A W A Y : Approach Thoughtfully and Trade Notes

Look Ahead

Overall, how do you see hybrid cloud environments benefiting your organization in the new reality of government?*

#1 Increasing flexibility/agility (41%)

#2 Improving cybersecurity (40%)

#3 Improving data availability and interoperability (38%)

*Respondents asked to select all that apply

While both in the majority, **Fed** IT managers are significantly more likely than **SLG** managers to see hybrid cloud as the **ideal** operating system for a **resilient government**:

92% to **79%**

TAKEAWAY
Hybrid Underpins Resilience

Power of Partnership

How can cloud specialists help you achieve your hybrid cloud goals?

*"Connect cloud services/ policies between **edge** and **core**, reduce long-term data costs, and promote the development of cloud"*

*"Establish and monitor **key performance indicators** (deployment frequency and speed, failure rate, and recovery time)"*

*"Improve **agility**, accelerate results, and provide a strong network of partners"*

*"Expand **distribution channels;** optimize existing inventory and performance"*

*"Help manage our cloud effectively… for a better, **more resilient** cloud overall"*

*"[Enable us to] invest more in **strategy** and less in putting out fires"*

T A K E A W A Y : Cloud Specialists Amplify Agility and Efficiency

Recommendations

Design a Comprehensive Data Strategy

Public sector IT managers agree managing and securing data across environments is the single biggest challenge of hybrid cloud. Before migrating, construct a future-focused strategy that allows you to see your data, make decisions based on it, and understand how much it costs.

Emphasize Security

According to public sector IT managers, security is the number one priority when moving to hybrid cloud environments. Secure systems by expanding continuous monitoring capabilities and improving consistency between on-premises and cloud security.

Partner with Cloud Specialists

Federal, state, and local IT managers say partnering with a hybrid cloud specialist can help control costs and optimize performance. Maximize your investments by collaborating with trusted partners and working with peers who have gone through the process.

Methodology

Respondent job titles

CIO/CTO or other executive-level IT decision-maker	**18%**
IT director/supervisor	**38%**
IT systems engineer or administrator	**14%**
Software/applications manager or engineer	**12%**
Cloud manager, specialist, or architect	**4%**
Data center manager or administrator	**3%**
Other IT manager	**11%**

Employer

Federal government: Civilian organization	**19%**
Federal government: DoD or Intel organization	**31%**
State government	**23%**
Local government	**27%**

Expertise

100% of qualifying government IT managers are familiar with their organization's hybrid cloud plans

MeriTalk, in partnership with NetApp, conducted an online survey of 300 Federal, state, and local IT managers familiar with their organization's hybrid cloud plans in December 2020. The report has a margin of error of ±5.62% at a 95% confidence level.

Thank You

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MeriTalk
Improving the Outcomes
of Government IT

86% of Federal IT managers say the COVID-19 pandemic amplified the importance of migrating to a hybrid cloud environment

69% say the pandemic accelerated adoption by a year or more

But,

Only **31%** say their agency's hybrid cloud strategy has been able to keep pace with accelerated adoption
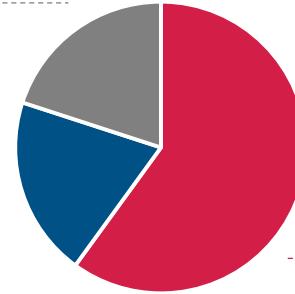
Biggest challenge of hybrid cloud?

20%
Justifying the investment

60%
Managing and securing data across environments

20%
Migrating to cloud

Additionally, **79%** wish their agency would have constructed a more thoughtful data strategy before migrating

92% of Federal IT managers agree a hybrid cloud is the ideal operating system for a resilient government

85% report improvements in their ability to meet the mission

Hybrid cloud benefits:*

#1 Increased flexibility/agility (45%)

#2 Improved cybersecurity (44%)

#3 Improved citizen services (40%)

While **86%** of Feds say their agency has a formal hybrid cloud strategy,

61% feel their agency is not getting the most out of its hybrid cloud investments

Top high-level strategy considerations:**

Security (87%)

Optimization and performance (81%)

Data stewardship and management (81%)

Cost-control (73%)
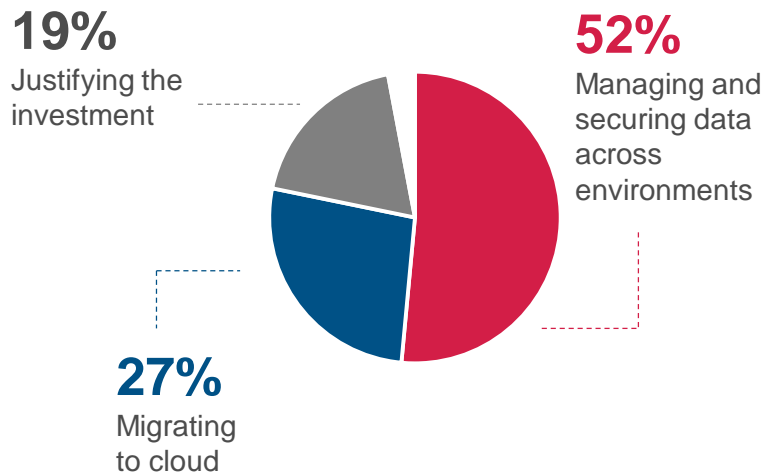
*Percentage who rated each very or extremely important

**Percentage who rated each very or extremely important

Appendix: State and Local Results

83% of SLG IT managers say the COVID-19 pandemic amplified the importance of migrating to a hybrid cloud environment

66% say the pandemic accelerated adoption by a year or more

But,

Only **29%** say their organization's hybrid cloud strategy has been able to keep pace with accelerated adoption

Biggest challenge of hybrid cloud?*

19%
Justifying the investment

52%
Managing and securing data across environments

27%
Migrating to cloud

Additionally, **72%** wish their organization would have constructed a more thoughtful data strategy before migrating

79% of SLG IT managers agree a hybrid cloud is the ideal operating system for a resilient government

83% report improvements in their ability to meet the mission

Hybrid cloud benefits:*

#1 Improved data availability and interoperability (37%)

#1 Improved flexibility/agility (37%)

#3 Improved cybersecurity (36%)

While **69%** of SLG IT managers say their organization has a formal hybrid cloud strategy,

57% feel their organization is not getting the most out of its hybrid cloud investments

Top high-level strategy considerations:**

Security (86%)

Optimization and performance (83%)

Data stewardship and management (77%)

Cost-control (72%)

*Percentage who rated each very or extremely important

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