Juggling the Clouds:
What Are Agencies Learning?

Underwritten by:

Affigent | D∕ELL Technologies
AN AKIMA COMPANY

Introduction

Just like there's rarely a single cloud in the sky, Federal agencies are experiencing the same with the growth of **cloud computing**. What challenges do they face as they keep more clouds in the air?

Is **Hyper Converged Infrastructure** (HCI) – consolidated compute, network, and storage in a software-defined solution – helping to bridge the gap between legacy and cloud environments (public, private, and edge)?

For the "**Juggling the Clouds: What Are Agencies Learning?**" study, MeriTalk surveyed 150 Federal IT decision makers to catalog multi-cloud experiences and challenges. The report explores perceptions of HCI as agencies juggle more clouds, scale their environments, and work to keep Federal data secure.

Executive Summary

- Multi-cloud environments are the new normal for Federal agencies
  - **81%** of Federal IT decision makers say their agency uses multiple cloud platforms

- But, few are confident in their ability to keep all the clouds in the air
  - **75%** say managing a multi-cloud environment will be one of their agency's top challenges over the next five years
  - Just **one in five** rate the consistency of their multi-cloud environment's operations and infrastructure as "very good"

- Feds are looking for tools to help simplify and secure modern environments
  - While just **28%** have invested in HCI today, those who have feel **significantly better prepared** for their agency's multi-cloud future
  - Agencies using HCI report improved backup and recovery capabilities (**48%**) and improved data sharing (**45%**)

Spotlight on Multi-Cloud

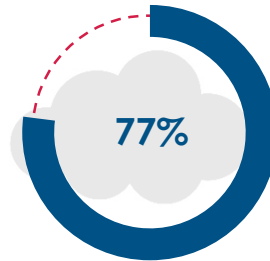- **81%** of Feds are working in a multi-cloud environment today; Most have a defined multi-cloud strategy
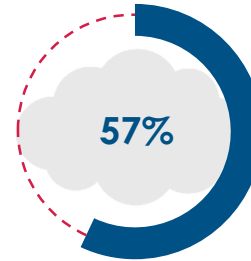
59%
have a defined multi-cloud strategy
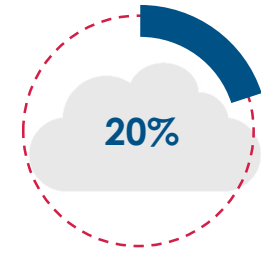
29%
say they will within the next 2-5 years

Which of the following are (or will be) part of your agency's multi-cloud strategy?*

77%
Private

57%
Public

20%
Edge

Take away: Already Showtime

Come One, Come All

- Performance, reliability, and cost savings top the list of multi-cloud drivers

What's driving Feds to adopt multi-cloud?*

49%
Increased performance

48%
Increased reliability

48%
Reduced costs

45%
Reduced risk

45%
Efforts to combat compliances/security issues

45%
Increased flexibility

Take away: Benefits, Step Right Up

*Respondents asked to select all that apply

The Catch

- Agencies are not prepared to manage multi-cloud

75%

say managing a multi-cloud environment will be **one of their agency's top challenges** over the next five years

45%

say their agency is **not adequately preparing** for their multi-cloud future
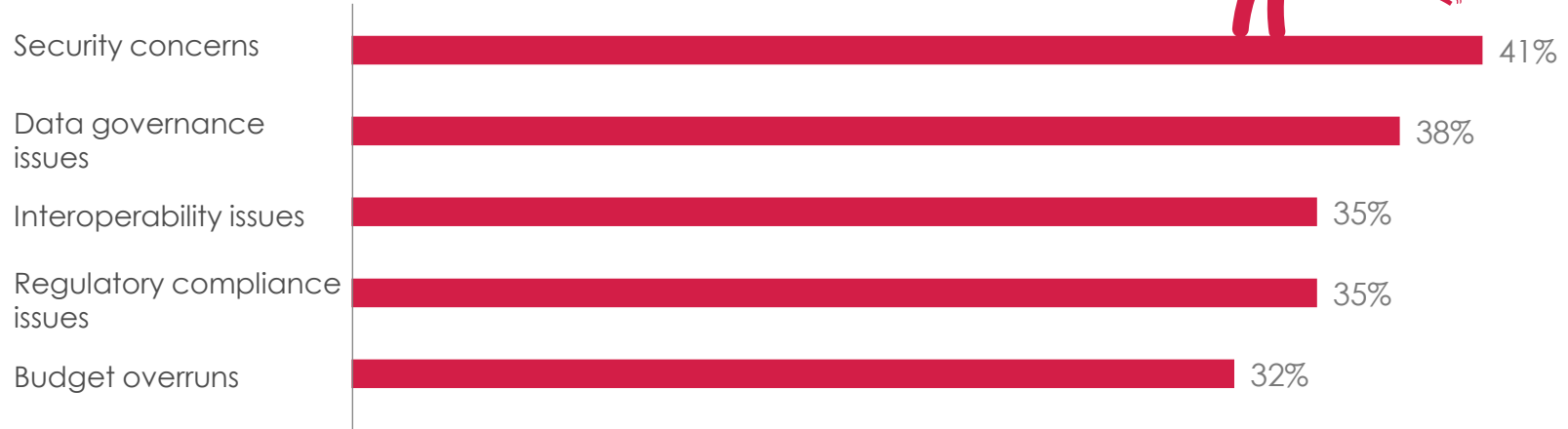
Take away: Identify the Gaps

Balancing Act

- Feds say the biggest challenges with multi-cloud management are security concerns, data governance, and interoperability issues

Top challenges with juggling multiple clouds:*

Security concerns	41%
Data governance issues	38%
Interoperability issues	35%
Regulatory compliance issues	35%
Budget overruns	32%

Take away: No Surprise Appearances

*Respondents asked to select all that apply

Team Mentality

- Feds identify "greater consistency across platforms" as one of the top opportunities to move multi-cloud forward

89% say consistency is critical to connecting teams and processes across cloud platforms

But today, few rate the consistency between their clouds' services, operations, and infrastructure as very good:

Services Just 37% say "very good"

Operations Just 21% say "very good"

Infrastructure Just 20% say "very good"
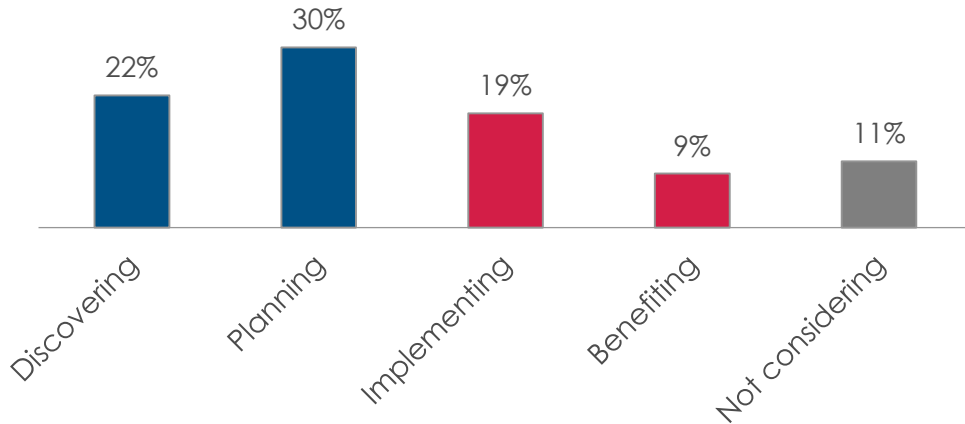
Take away: Integration and Interoperability are Key

*Respondents asked to select all that apply

Gaining a Following

- **28%** of Feds say their agency has invested in Hyper Converged Infrastructure (HCI); those who have feel more prepared for their multi-cloud future than their peers

Where does your agency stand regarding HCI solutions?*

Chart data:
- Discovering: 22%
- Planning: 30%
- Implementing: 19%
- Benefiting: 9%
- Not considering: 11%

Those implementing or benefiting from HCI are more likely to say their agency is adequately preparing for their multi-cloud future (**62%** to **44%**)

Take away: HCI Helps Bridge the Gap

*The remaining 9% are unsure

Show Stoppers

- Feds also say HCI improves security and interoperability

Feds using HCI report:**

Improved backup and recovery capabilities (48%)

Improved data sharing (45%)

Lessons Learned

★ "HCI offers **fast access** between applications and databases"

★ "[The importance of] software usability and **backwards compatibility** (i.e., interoperability with legacy systems)"

Take away: Crowd Pleaser

**According to those implementing or benefiting from HCI

Work in Progress

- In addition to HCI adoption, agencies are starting to train their IT workforce, implement access controls, and identify multi-cloud leaders to get the most from their multi-cloud environments

What steps have you taken to ensure cloud platforms integrate with each other and legacy infrastructures?*

42% Trained IT workforce for multi-cloud

35% Implemented access controls

32% Established a multi-cloud leadership team

31% Architected for integration and flexibility

31% Created user groups to discuss best practices

Take away: More Work Ahead

*Respondents asked to select all that apply

How to Juggle Multi-Cloud

- Feds suggest additional training, proof of concept systems, and stakeholder communication for successful multi-cloud management

What advice do you have for others managing a multi-cloud environment?

"Make sure you have a large enough and **well-trained team** to handle it. They can easily get overwhelmed learning one cloud environment, much less multiple ones "

"Be deliberate in implementing **proof of concept systems** and **architecture** before moving mission-critical applications to the cloud "

"I would say **be prepared.** Leverage existing platform tools, **don't reinvent the wheel** "

"Ensure the end users truly understand that the **mission is the focus**, and the clouds will help that mission. This is not being done simply as a trend "

Take away: Manage Multi-Cloud with Confidence

Recommendations

Prepare Your Performers: Federal IT managers view employee training and good communication as two of the most important steps to successfully integrating cloud platforms and legacy infrastructures. Invest in proof of concept projects.

Emphasize Teamwork: With multi-cloud environments spanning private, public, and edge platforms, interoperability is key. IT leaders need connective, adaptable technologies to avoid data silos.

Review HCI Impact: Feds with HCI say they are better prepared to manage multi-cloud environments, reporting security and interoperability benefits.

Methodology & Demographics

MeriTalk, on behalf of Affigent, an Akima Company, and Dell Technologies, conducted an online survey of 150 Federal IT decision makers familiar with their organization's cloud computing plans in October 2019. The report has a margin of error of ±7.97% at a 95% confidence level.

Respondent job titles

CIO/CTO	12%
Deputy CIO/CTO	7%
IT Director/Supervisor	29%
IT Systems Engineer or Administrator	16%
Data Center Manager or Administrator	4%
Network Manager or Administrator	5%
Software Applications Manager or Administrator	9%
Cloud Architect	2%
Other IT manager	16%

Agency

Federal government: Civilian organization	61%
Federal government: DoD or Intel organization	39%

Expertise

100% of qualifying Federal IT decision makers are familiar with their organization's use of or plans for cloud computing

Thank You

www.meritalk.com

research@meritalk.com

703-883-9000 ext. 122