

CLOUD INDUSTRY FORUM

Adapt, Innovate, Advance!
Digital Transformation
in the COVID era

Executive summary

We've been talking digital since Nicholas Negreonte's Being Digital was published in 1995. We've been explaining cloud since the term went mainstream in 2007. The Cloud Industry Forum came into being the following year and we've spent the last 12 years monitoring cloud's progress and evangelising its use as an enabler of change. From 2014 we started thinking and planning digital transformation in our organisations.

The rate of technological and operational change has steadily increased in the first two decades of the 21st century, but nothing prepared us for what happened in 2020. We've moved on from a complicated to a complex world, where a small change can have dramatic consequences. The small change was a virus.

For many of us, the resultant shift to working from home had to happen in a matter of days. Suddenly work wasn't a place you went, but something you did. The future of work became the present of work. To support us, what would normally have been a change project weeks and months in planning, and months or longer in implementation, had to be completed by the end of the week.

Our business and operating models have been stress-tested in ways we didn't plan for. Our approach to security has needed a rethink. We've needed to innovate, lead and manage differently. The employee experience has come to the fore, and our teams' health and wellbeing are being discussed. Cloud technology has been a key enabler in supporting all the necessary changes. The infrastructure has held up remarkably well, considering the dramatic shifts we've all experienced. In April, Microsoft's CEO Satya Nadella said, "We've seen two years' worth of digital transformation in two months."

This white paper moves beyond cloud adoption to explore Covid-19's impact on the IT landscape. What has blocked progress? What skills do we need? How do we tackle what happens next? In today's complex world it's difficult to plan, but you can prepare. 2020 has triggered permanent change, but we need to get ready for the next disruption too – another pandemic, climate change, or something else. We believe the data points, insights and conclusions from our survey will inform your thinking and your strategy.

David Terrar – Chair – Cloud Industry Forum

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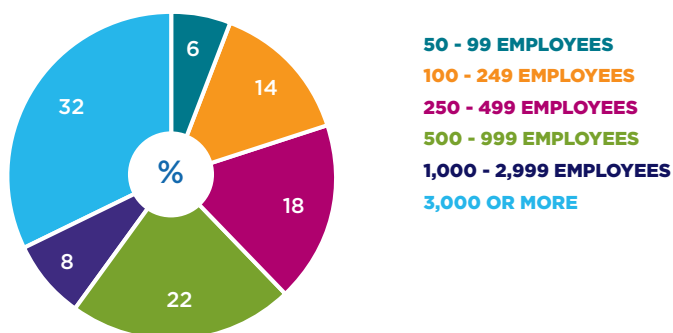
Methodology and definitions

Methodology and sampling

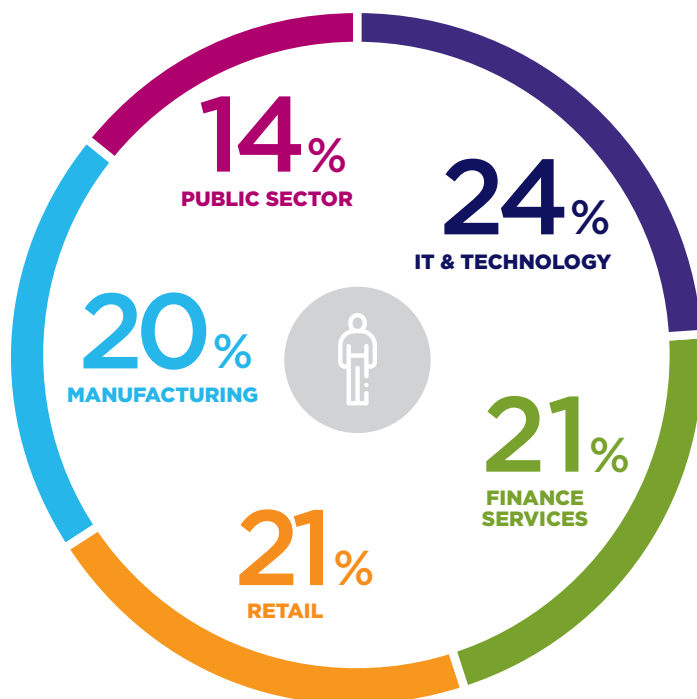
In late 2020, Vanson Bourne conducted a major research project on behalf of the Cloud Industry Forum, designed to examine the effects of the Covid-19 pandemic on cloud and IT, and assess what needs to be done to address these challenges in 2021 and beyond. The survey polled 250 senior IT and business decision-makers in large enterprises, small to medium-sized businesses (SMEs) and public sector organisations. All of those represented have UK operations.

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How many employees does your organisation have globally?



Within which sector does your organisation operate?





Cloud computing

As the sophistication and scope of cloud computing has grown, its definition has evolved to cover many different things. It might be used to describe hosted IT services or outsourcing of any type, or it can be defined as something more specific, such as data storage or application management. However, for the purposes of this report, we have stuck with the tried-and-trusted definition of cloud put forward by the National Institute of Standards and Technology (NIST):

Cloud computing is a term that relates to the IT infrastructure and environment required to develop/host/run IT services and applications on demand, with consumption-based pricing, as a resilient service. Communicating over the internet and requiring little or no client end components, it provides resources and services to store data and run applications, from many devices, anytime, anywhere, as-a-service. The services can, in turn, be scaled up and down as needed to meet a customer's variable operational needs, ensuring maximum cost efficiency.

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Digital transformation

Digital transformation is the process of combining IT modernisation, an agile approach, and new ways of working and thinking using digital, social, mobile and emerging technologies. It involves a change in leadership, the encouragement of innovation and new business models, the digitisation of assets, and an increased use of technology to improve the experience of your organisation's employees, customers, suppliers, partners and stakeholders.

Summary of key findings

Covid-19 has had a transformative impact on IT:

- The Covid-19 pandemic has forced the large majority of organisations (83%) to change their IT strategy in some way
- Four in ten businesses (41%) concede that their remote working solutions are not as secure as the office, highlighting security concerns
- 55% of respondents have increased their cloud adoption as a direct result of Covid
- Remote working has brought many positives, with 56% highlighting flexible working and 41% enjoying increased use of cloud-based collaboration apps

55% of respondents have increased their cloud adoption as a direct result of Covid

Digital transformation remains front of mind:

- Almost three-quarters of respondents (73%) either had a digital transformation strategy in place before the pandemic or were in the process of implementing one
- 60% of leaders believe that their company is doing “just enough” to become digitised, leaving room for further acceleration in digital adoption
- Stretched budgets, a lack of in-house skills and an underdeveloped company culture are considered major hurdles to further digitisation

Cloud’s role has been pivotal throughout the crisis, and will remain so:

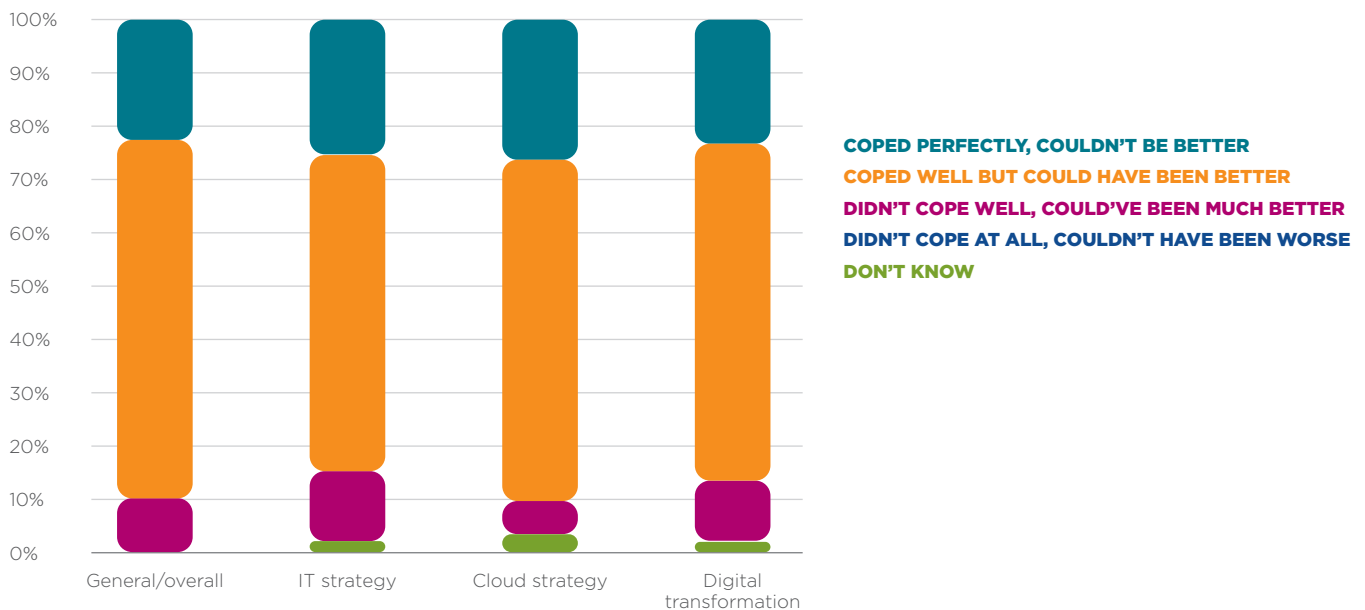
- 91% of decision-makers surveyed said cloud played an important part in their response to the pandemic, with 40% describing its role as critical
- 88% of organisations expect their adoption of cloud services to increase in the next 12 months
- 54% said cloud has enabled a swift transition from office to home working, with 44% mentioning greater organisational agility and 42% the ability for business to continue as usual

Covid-19: a shock to the system

Few of us will forget 2020 in a hurry. What started as whisperings of a mystery new virus early in the year has evolved into the most disruptive global event that many of us have seen in our lifetimes. Businesses of all shapes and sizes have been dealt a monumental blow, and how we approach 2021 will be key to our recovery.

Coping in a crisis

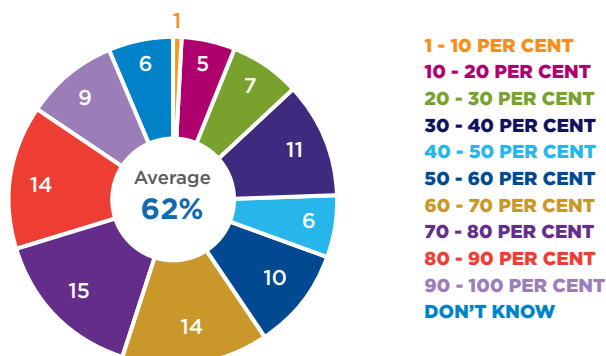
How do you feel your organisation has coped with the impact of Covid-19?



It is heartening in many respects to see that, on the whole, organisations believe they have coped well with Covid-19 so far. This seems to reflect the general feeling of business leaders more widely: the rapid switch to remote working – while not without its setbacks – worked relatively well and helped keep thousands of companies and vital public services going. However, the majority of firms recognise that they could also have managed this process better, which highlights how there is room for improvement.

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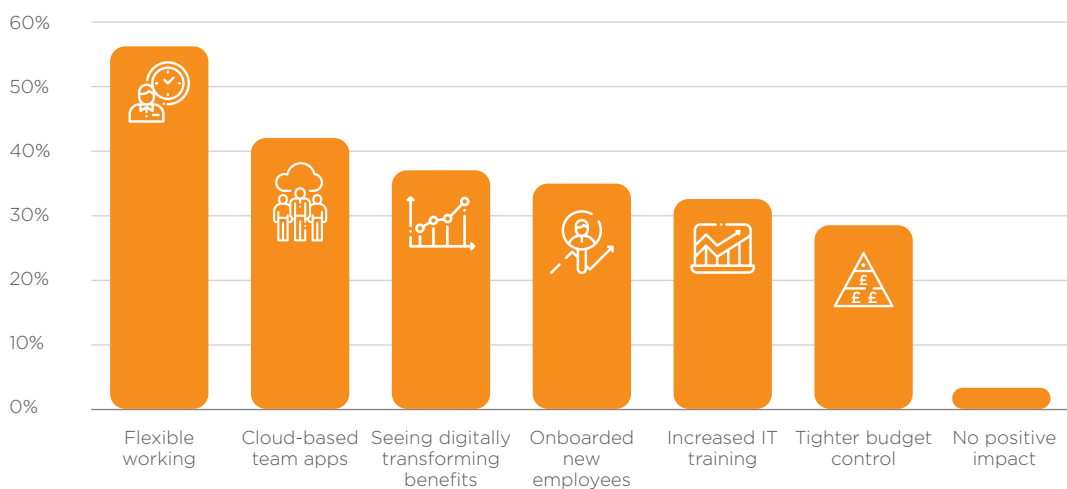
Approximately what percentage of your organisation is now able to work remotely?



On average, the decision-makers polled said 62% of their organisation is now able to work remotely. In a similar vein to the previous chart, this underlines the positive work that companies have done to enable effective remote working, while at the same time showing that there is plenty of progress still to be made.

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How has Covid-19 positively impacted your organisation's employees?



There are also many positive aspects to shout about as far as remote working is concerned. A greater emphasis on flexible working was cited by 56% of respondents, revealing just how popular breaking beyond the traditional 9-5 has been. The use of cloud-based collaboration apps (cited by 41%) has also been hailed a success, as has the chance to see the benefits of digital transformation more clearly (38%).

Managing well, but not without challenges

Have you implemented any new IT security measures for your organisation's employees who were asked to work remotely?

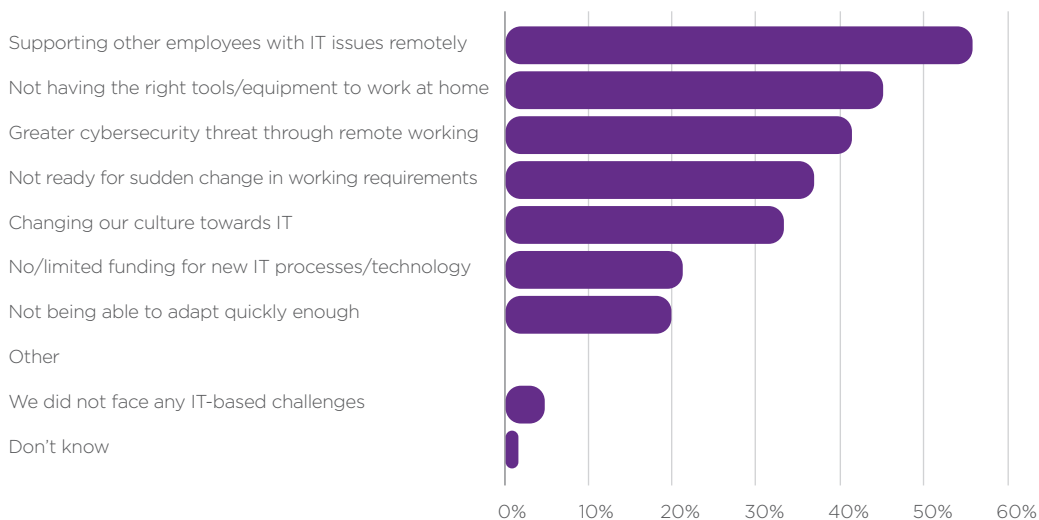


Such a rapid and unexpected shift in the way we work was always likely to present some challenges, one of the biggest of these being security. The potential hazards of using personal devices to access sensitive company information are well-documented, so leaders need to do everything in their power to avoid the financial and reputational harm caused by a breach.

Four in ten (40%) said the new IT security features they implemented made remote working as secure as the office, which again is a positive. However, a slightly higher percentage (41%) acknowledged that the solutions they implemented are not as secure as being in the office, which hints at a need for further expansion in security capabilities.

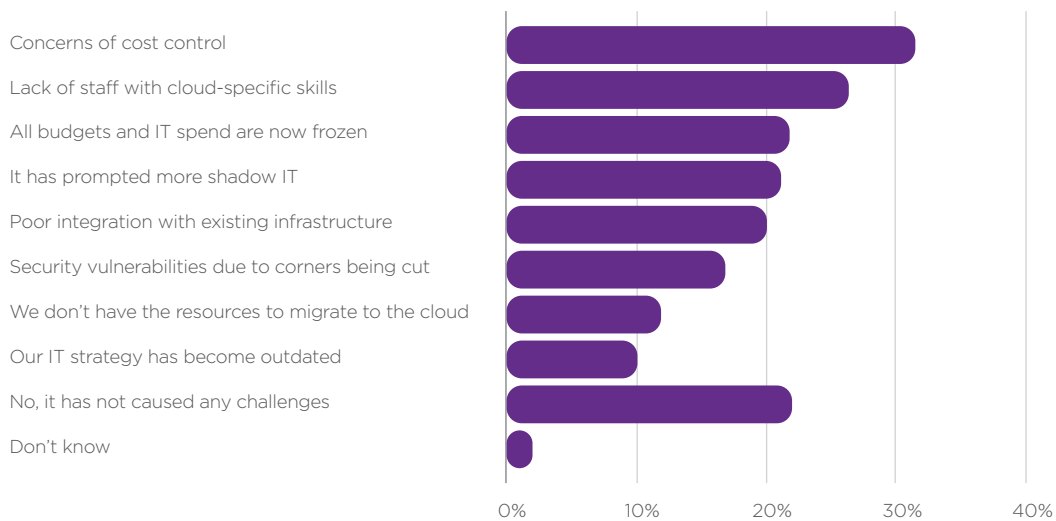
40% said the new IT security features they implemented made remote working as secure as the office, which again is a positive

What IT-based challenges did your organisation face in response to Covid-19?



Alongside the cybersecurity issue, decision-makers faced a host of other hurdles to overcome. Chief among these was the difficulty of supporting employees with IT issues while working remotely, mentioned by 56% of respondents. A lack of adequate equipment to facilitate home working was also prominent (45%), as was the general shock of such a sudden change (37%).

Has the pace of your organisation's cloud adoption caused any challenges during the Covid-19 pandemic?

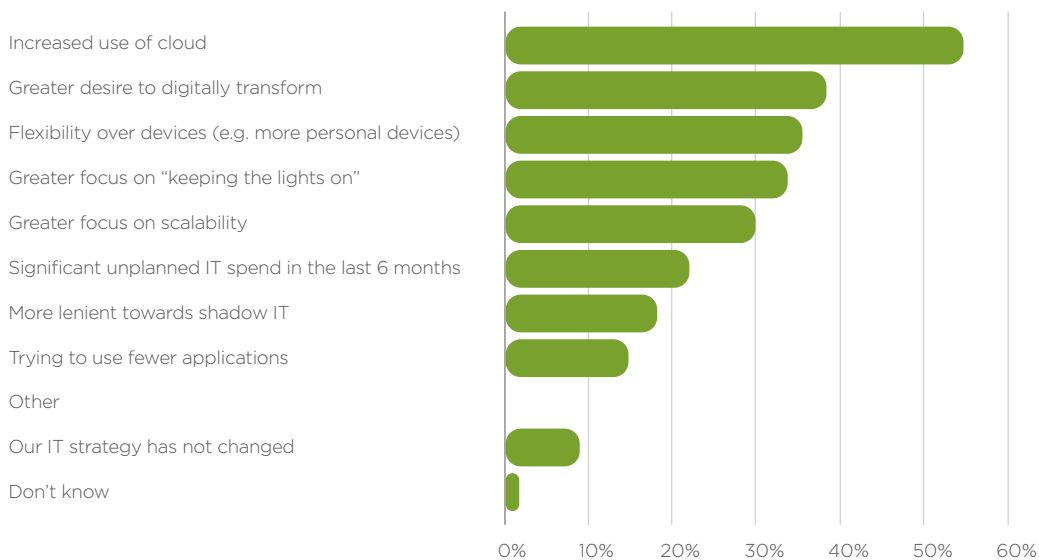


Digging more deeply into how the pandemic has affected cloud adoption provides some interesting insights. Close to a third (32%) believe that Covid has raised concerns about cost control, while 26% worry about a lack of staff with cloud-specific skills, and 22% have seen an increase in shadow IT. These challenges reveal a need for many organisations to re-evaluate their cloud strategies if they are to maintain their momentum.

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Transforming on the fly

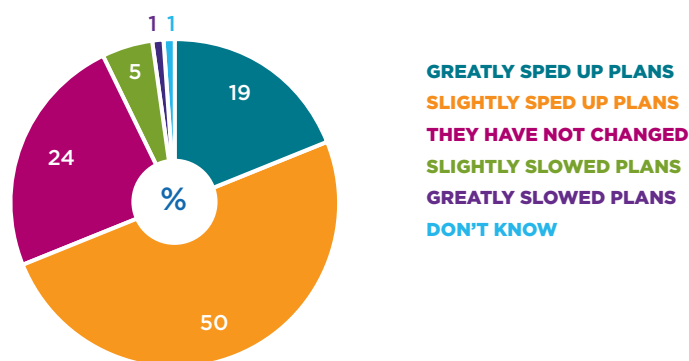
How has your organisation's IT strategy changed in response to Covid-19?



Cloud has proven to be instrumental in helping businesses adapt their IT strategies throughout this year, with more than half of respondents (55%) increasing their adoption of cloud to help cope with lockdown-based upheaval. Connected to this is an increased desire to embrace digital transformation (38%). Other common changes include a greater use of personal devices (36%), a stronger focus on keeping the lights on (34%), and an enhanced focus on scalability (30%). It seems clear from this that organisations are fighting a number of battles, covering not just the need to keep things running smoothly, but a requirement to build further IT capacity too.

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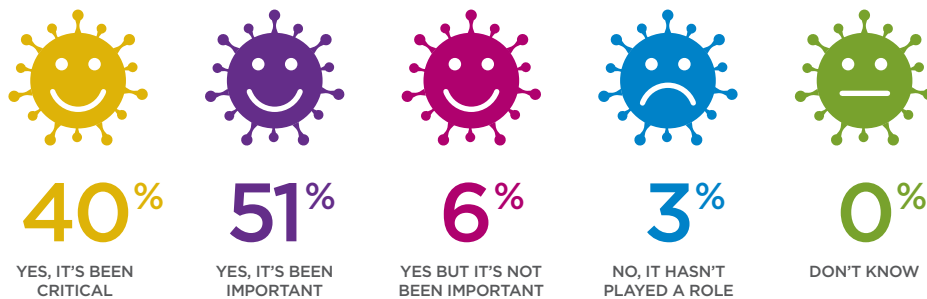
How has Covid-19 impacted your organisation's digital transformation plans?



As far as digital transformation as a whole is concerned, 69% of organisations have sped up their plans in some way as a result of the pandemic. This is unsurprising: Covid-19 has essentially forced a real-life, real-time digital transformation on a huge number of businesses, and many leaders have seen digital's long-term value as a result.

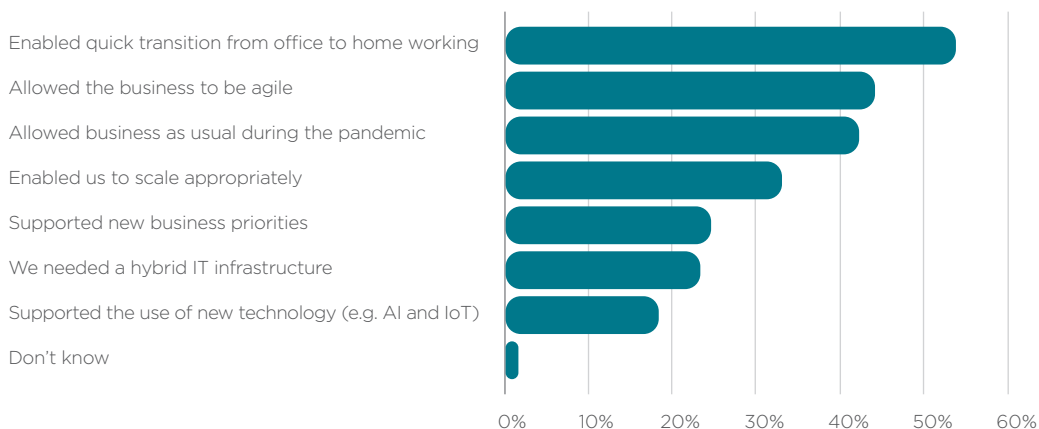
Cloud catches the eye

Has cloud played a role in your organisation's response to Covid-19?



The above graphic illustrates just how vital cloud has been in helping organisations respond to Covid. 91% of decision-makers surveyed said that it has played an important part in this response, with 40% describing its role as critical.

How has the use of cloud helped your organisation during the Covid-19 pandemic?



Cloud's benefits in the last few months have been numerous. The most widely cited advantage is how it has enabled a swift transition from office to home working (54%), with greater organisational agility (44%), the ability for business to continue as usual (42%), and easier scalability (33%) also widely mentioned.

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With normal working practices likely to be disrupted for at least some part of 2021, cloud will continue to spearhead the IT department's bid to keep the business running smoothly.

SUMMARY

On the whole, organisations did a commendable job of adapting in the face of a hugely unprecedented situation; it is safe to say that many have been pleasantly surprised at how successful the shift to remote working has been. Benefits that might not have been so obvious beforehand have been recognised, giving many organisations a powerful platform to improve their long-term processes for the better.

Despite these pockets of positivity, there is still plenty of work to do to plug the gaps that were bound to appear with such rapid change. Security concerns, increased costs and skills shortages have been exposed, as has the need to ensure the mental wellbeing of employees is properly looked after. This is why continuously fine-tuning IT practices and workplace processes will be essential. Cloud has a clear role to play in this.

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Cloud: the current state of play

Now that we have explored the profound impact Covid-19 has had on IT, it is useful to look at the general state of play regarding cloud adoption and growth. From here, we should be able to start building an accurate picture of the steps organisations should take to increase their resilience and agility in future.

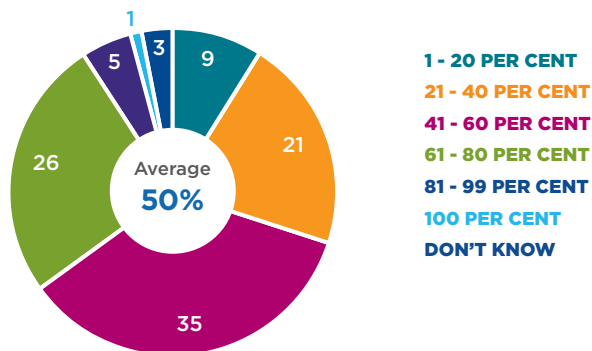
Does your organisation have any hosted or cloud-based services in use?



It is fair to say that cloud has become an integral component of the modern business. The overwhelming majority of companies (94%) use cloud in some way, with this number having risen slightly on last year. It is possible that organisations have reached a point of near-saturation when it comes to cloud adoption, with many of the easier projects now completed. The next step will be to address any issues with existing legacy systems with cloud-based alternatives.

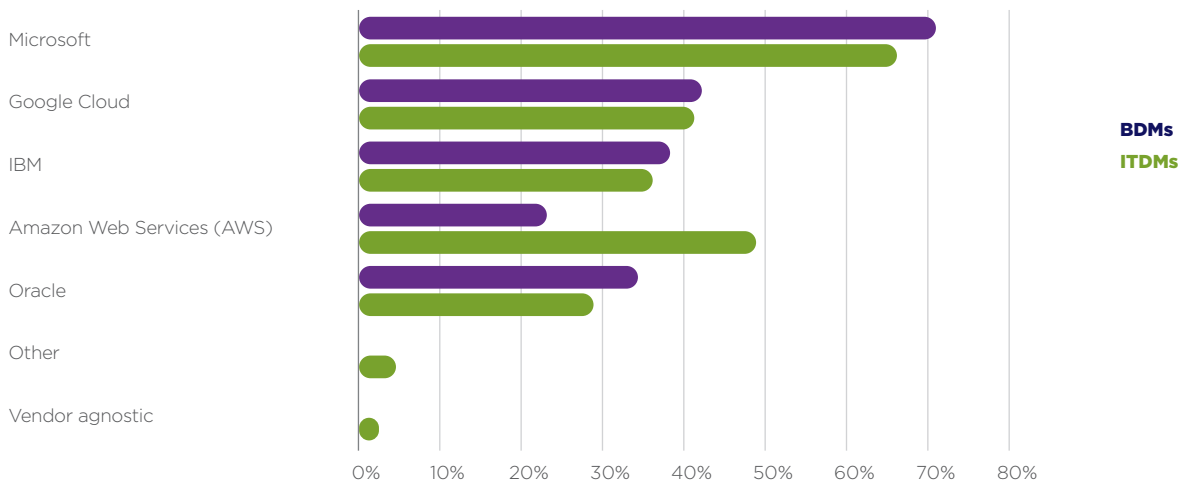
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What proportion of your organisation's IT infrastructure is hosted in the cloud?



On average, 50% of an organisation's infrastructure is now cloud-based. Just over a quarter of respondents (26%) said that between 61 and 80% of their infrastructure is now hosted in the cloud, meaning that a solid proportion are well into a majority cloud phase. With remote working now so commonplace, this is an encouraging sign.

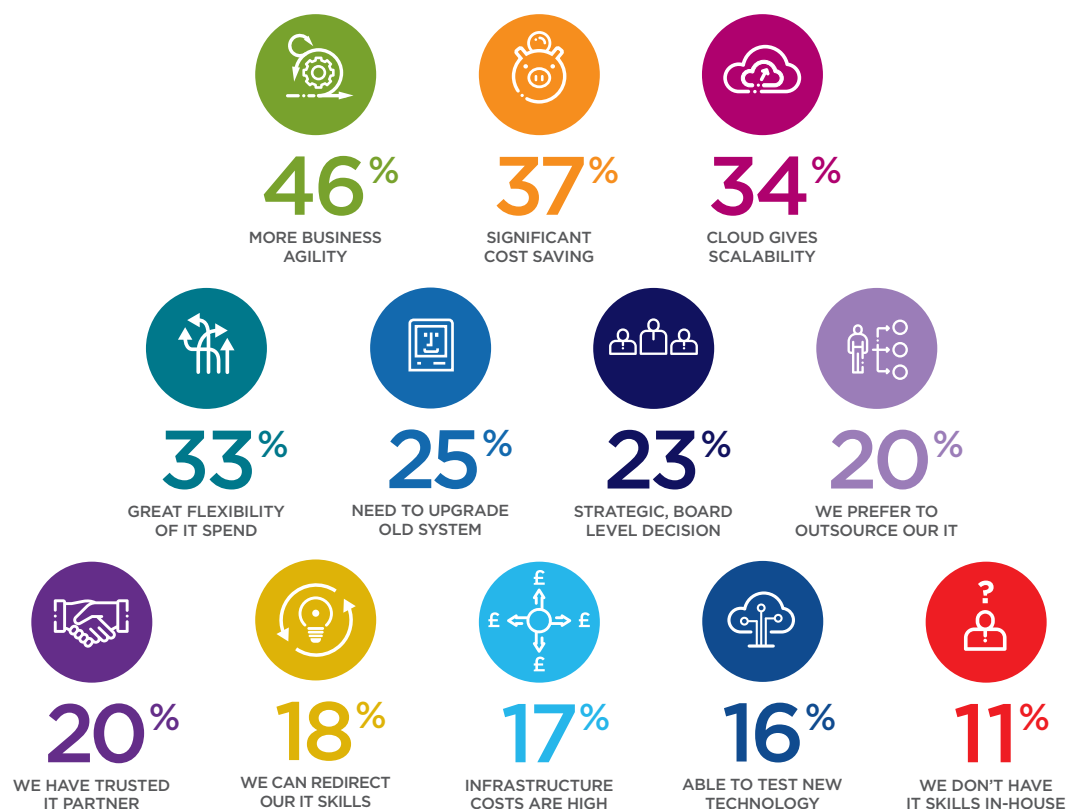
Which of the following would be your organisation's top choices of cloud vendor?



Despite market share variations amongst the hyperscale providers, Microsoft remains the most popular choice of cloud vendor amongst those surveyed, cited by 67% of IT decision-makers and 71% of business decision-makers. Google Cloud is in second place, while third spot seems to vary depending on decision-maker: business leaders see IBM as the third most popular choice (cited by 38%), whereas those in IT choose AWS (cited by 49%). It should be noted that these figures reflect the holistic portfolio of services offered by each vendor, rather than their share in any one market or product segment.

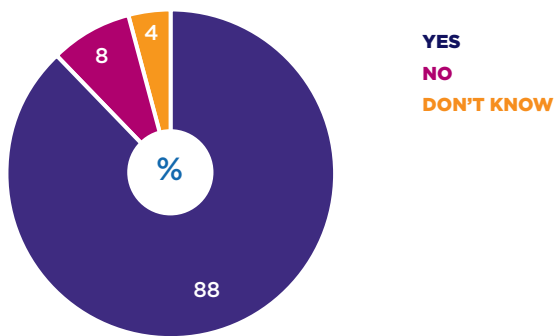
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Why is your organisation utilising hosted or cloud-based services?



Motivations for employing hosted or cloud-based services are diverse. The most popular is the chance to become more agile as a business (cited by 46%), with cost savings not far behind on 37%. Scalability (34%) is also a big deal, alongside greater flexibility in IT spend (33%) and the opportunity to upgrade from older legacy systems (25%).

Do you expect your organisation's adoption of cloud services to increase over the next 12 months?



Looking to the future, the verdict on increasing cloud adoption in the next 12 months is almost unanimous. Close to nine in ten (88%) expect to embrace additional cloud services in the coming months, which is unsurprising given the pandemic's transformative effect on working practices.

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SUMMARY

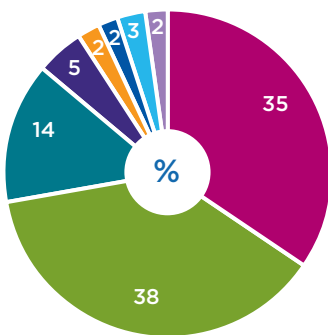
Cloud's popularity as a key business driver is undeniable, with the above figures broadly reflecting the trends we have seen over the last few years. Adoption rates appear healthy and the benefits of cloud are well-recognised. As business and IT leaders negotiate the next steps in their recovery from the Covid-19 pandemic, we expect this reliance on cloud to continue to grow.

Digital transformation

The concept of digital transformation has been talked about for years, and there are few businesses left that have not yet engaged with digital in some way. While previous iterations of this report have focused on the pace of change and what leaders need to do to speed this up, this year has been the biggest test of digital readiness we have ever seen.

Preparation is key

Does your organisation have a digital transformation strategy?

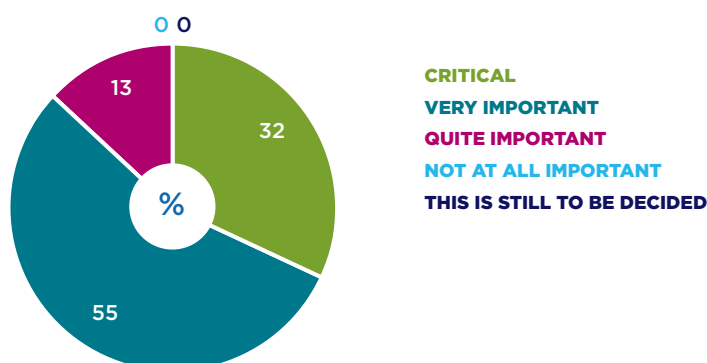


- YES, WE HAD ALREADY IMPLEMENTED ONE PRE COVID-19**
- YES, WE WERE ALREADY IN THE PROCESS PRE COVID-19**
- YES, BUT WE RAPIDLY ESCALATED IT OVER PAST 6 MONTHS**
- NO, BUT HAD TO DEVELOP ONE DUE TO COVID-19**
- NO, BUT WILL DEVELOP ONE IN NEXT MONTH**
- NO, BUT WILL DEVELOP ONE IN NEXT 3 MONTHS**
- NO, BUT WILL DEVELOP ONE IN NEXT 6 MONTHS**
- NO, WE DON'T HAVE ONE OR PLAN TO**

Just over a third of respondents (35%) had a digital transformation strategy in place before the arrival of Covid-19, which likely gave them the impetus to act quickly during the sudden shift to home working. An additional 38% were in the process of implementing one before the pandemic, while 14% were forced to scale up their plans as lockdowns began to bite. This paints a fairly positive picture of digital plans and preparedness, although a fairly significant minority were caught off guard.

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To what extent is cloud important to your organisation's digital transformation strategy?



The above chart shows that cloud's place in the minds of decision-makers is now hugely prominent. Almost a third (32%) consider it critical to digital transformation, while a majority (55%) consider it very important. No respondents see it as unimportant, which bodes well for the future of digital innovation.

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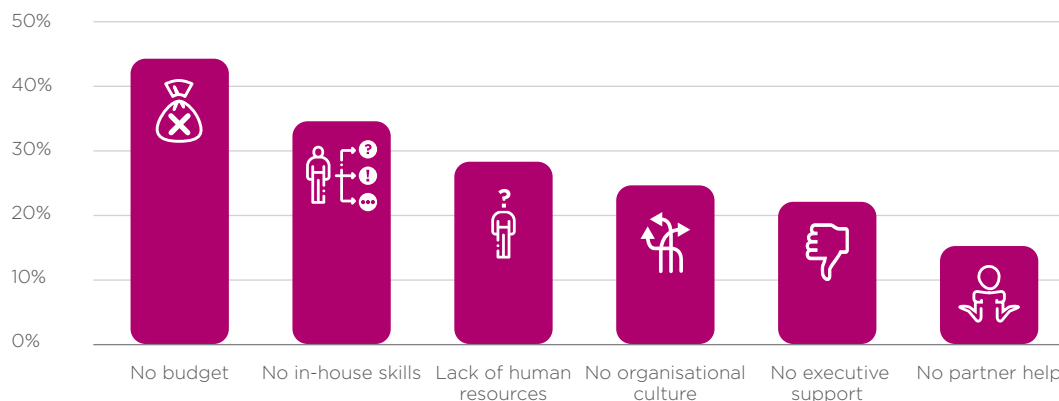
Making digitisation happen

Do you believe that your organisation is doing enough to become fully digitised?



Overall, 81% of respondents believe that their organisation is doing at least an adequate job of becoming fully digitised. There is also little divergence of opinion between IT and business decision-makers, suggesting they are on the same page in this respect. That said, a majority (60%) said their company is doing "just enough", while almost a fifth (18%) still feel that more effort is needed. It is these areas that demonstrate that there is still more to be done, especially as we navigate a post-Covid world.

What is preventing your organisation from becoming digitised more quickly?



The standout reason for a lack of pace in digitisation appears to be a lack of budget (cited by 43% of respondents), which could continue to be an issue as cash-strapped companies tread a rocky road to pandemic recovery. A shortage of in-house skills is also common (34%), which in many respects is linked to a lack of adequate human resource (29%). Not having the right organisational culture (25%) is also an interesting problem at this time, given the challenges of sustaining a consistent, productive culture when entire businesses are working remotely.

SUMMARY

As far as digital evolution in general is concerned, organisations are very much on the ball. Most are either digitised already or are very much willing to embrace new technologies, and there is a near universal appreciation for cloud’s potential.

Despite these positives, most businesses recognise their need for further improvement, and are fully aware of the budgetary constraints, skills shortages and cultural hurdles that are keeping the brakes on progress. With these issues likely to remain prominent throughout 2021, cloud has a leading role to play in helping organisations get things done in an efficient and cost-effective manner.

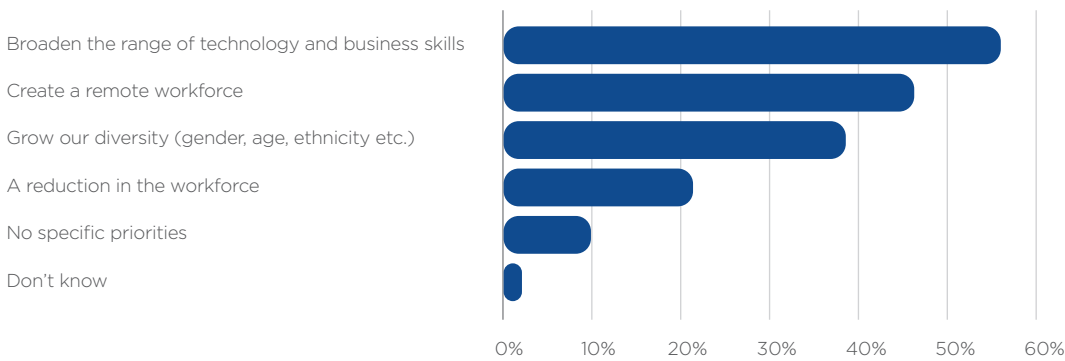
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Skills to pay the bills

We have established that skills shortages are one of the biggest concerns amongst IT and business decision-makers when it comes to digitising at pace. How organisations are tackling this provides some useful indicators of how this will develop over the course of the year. Skilled IT professionals are expensive resources for any business, and with imported skills such as contractors cut back to save money, there is a need to develop this expertise using current staff.

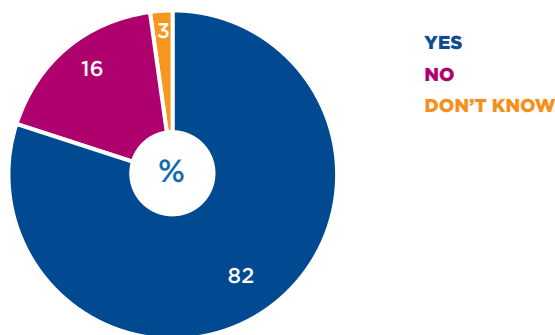
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What are your organisation's future IT hiring priorities?



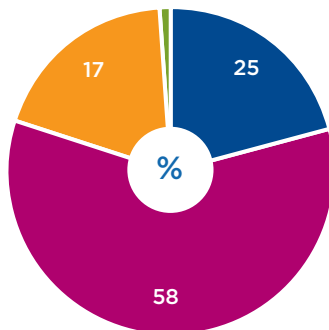
IT hiring in the immediate future is most likely to focus on broadening the range of technology and business skills (mentioned by 56% of respondents), underlining the general requirement to upskill in key areas. The need to build a functioning remote workforce is also front of mind (46%), alongside increasing diversity in the IT department (38%). All of these goals, if achieved, will help to improve connections between IT and the wider business.

Does your organisation's IT function report directly to the board?



In the large majority of organisations (82%), the IT function has direct access to the board. This is actually a decrease on the 91% we saw last year, which suggests that close cooperation between IT and wider business leaders has fallen slightly in the last year. This is something that should be addressed if companies are to ensure they are fully aligned on skills and responsibilities in the long run.

Has the way your organisation's IT function works changed due to the Covid-19 pandemic?



YES, WE HAD TO COMPLETELY CHANGE OUR STRATEGY
YES, WE HAD TO MAKE SLIGHT CHANGES TO OUR STRATEGY
NO, IT HAS REMAINED THE SAME
DON'T KNOW

The above perhaps provides some context to the previous chart. The Covid-19 pandemic has forced the large majority of organisations (83%) to change their IT strategy in some way, with a quarter having to overhaul their strategy completely. As IT departments adjust to these new challenges, leaders should emphasise re-establishing close links with the board.

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SUMMARY

The issue of skills shortages is probably more prominent now than it ever has been, with remote working adding a completely new dimension to the equation. Leaders will have to be smart with their IT hiring choices in the future, by plugging gaps in skills while building a harmonious workforce and maintaining good relations between IT and the board. All of this will have to be achieved in the possible absence of an office environment. As the shock caused by Covid-19 disruption subsides, these tasks should hopefully become easier.

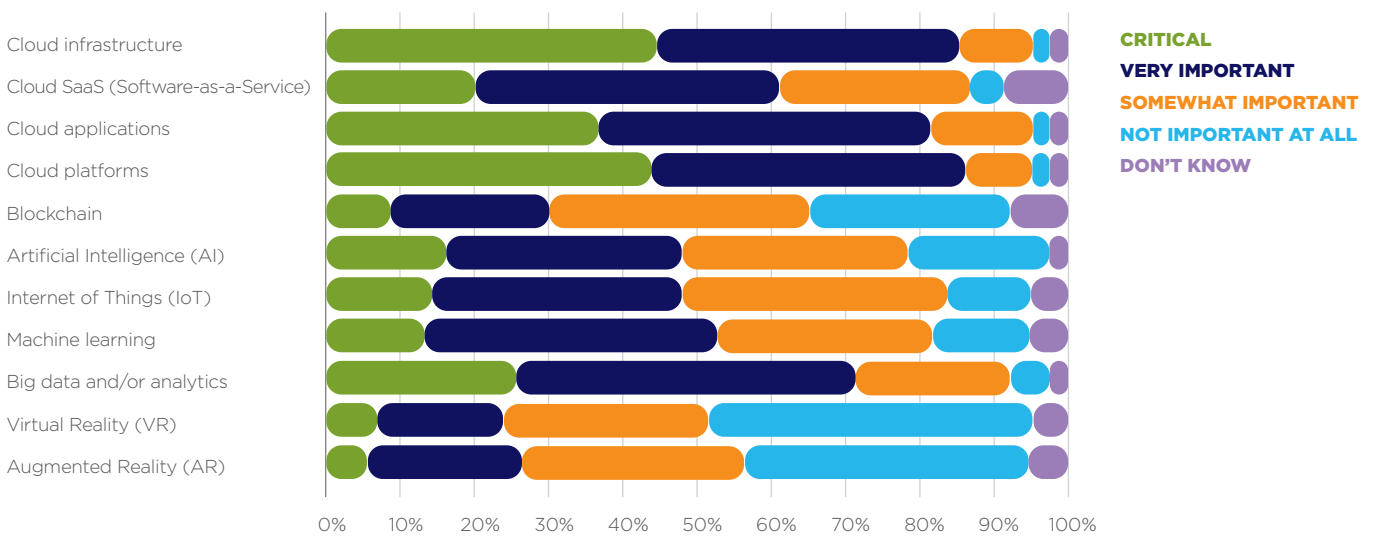


An eye on the future

In a time where certainty of any kind is hard to come by, predicting the future can be a monumental task. Our data does, however, give some indication as to how IT departments are moving on from the maelstrom of 2020.

New tech, new projects

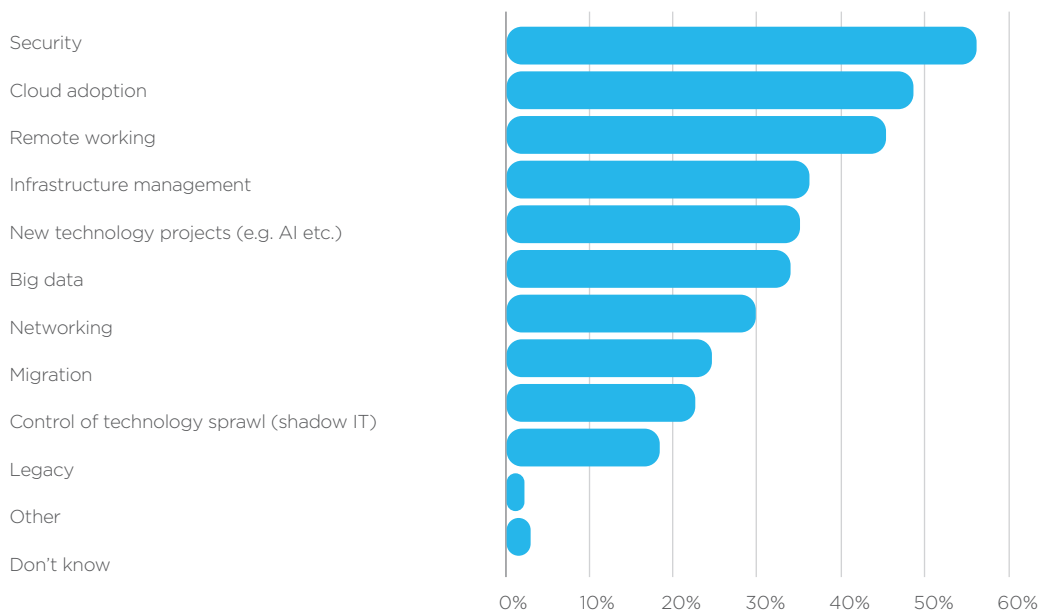
How important will the following technologies be to your organisation in the next five years?



Organisations are focusing on a diverse range of technologies to help drive the business forward in future years. Cloud technology in its various guises – infrastructure, SaaS, applications and platforms – are high on the priority list, again illustrating its central role. While not quite as high up the agenda, other areas such as AI, IoT, machine learning and big data also figure prominently.

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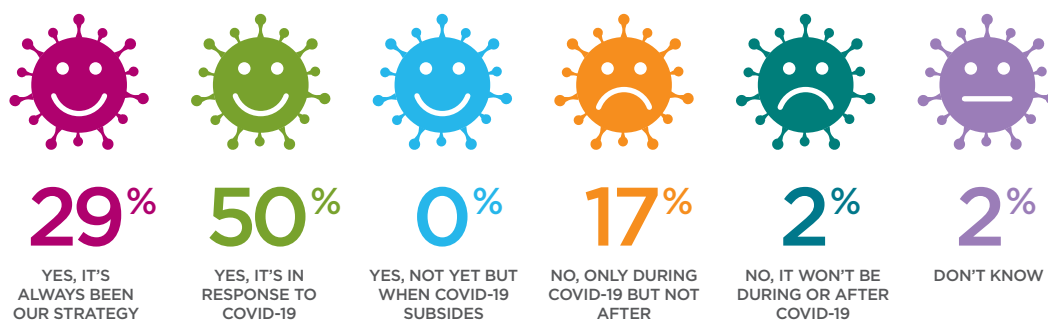
Which of the below are your organisation's most important IT projects?



Security projects were identified by 57% of respondents as being amongst the most crucial IT priorities for the business. Cloud adoption is in second place (49%) with remote working close behind (47%). These seem broadly to reflect the situation that many firms find themselves in at present: remote working is now a requirement rather than a perk, so this needs to be done in a way that is both efficient and safe from external harm.

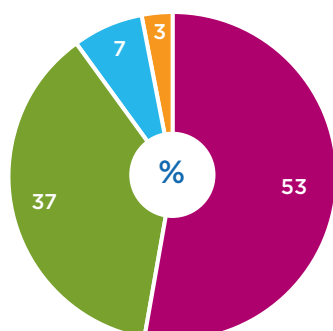
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Is remote working a part of your organisation's strategy moving forwards?



For most organisations, remote working is here to stay, in some capacity at least. For half of respondents (50%), this was brought into play as a direct result of the pandemic, illustrating that few were fully prepared for the change when it came along.

Which of the below best matches your future expectations of your organisation's IT?



ACCELERATE ADOPTION OF NEW TECHNOLOGY
IT WILL REMAIN UNCHANGED
IT SPEND TO BE SUSPENDED, WE'LL ADOPT LESS TECHNOLOGY
DON'T KNOW

It is positive to see that the majority of respondents (53%) will be accelerating their adoption of new technology in the near future, perhaps partly as a reflection of their experiences in 2020. A significant minority, however (37%), believe their pace of adoption will remain unchanged. This could be an indicator of the confidence they already have in their plans and ability to adapt in a post-Covid world.

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SUMMARY

There is a huge amount for IT and business leaders to think about in the coming years, but also plenty of opportunities to thrive. All the tech-related challenges they had in normal times still apply, with the fallout from the pandemic adding an extra degree of turbulence to proceedings. Organisations do, however, seem ready to hit the ground running, so it will be interesting to see how they cope.

Conclusion

The themes emerging from this CIF annual survey are almost surreal. Who would have thought that cloud computing would suddenly be weaved into a story about a pandemic? It almost writes a newspaper headline: Will cloud save the day? We will have to wait on that report.

This survey does reveal that cloud has assisted businesses in reconfiguring how they operate. The promise of cloud was put to the test. According to this survey it passed the test, with 91% stating it had played an important role in the response to Covid-19. We survived the immediate aftermath. What's up next?

Here is where it gets interesting. The Allianz Risk Barometer¹ records cybersecurity as overtaking business continuity as the number one risk to an organisation. In light of Covid-19 they likely rank equally now. So, the new BAU for an organisation is to prepare for:

- 1 Business continuity running hot or on standby.
- 2 24/7 proactive defences against cyber risks.

Large organisations will find the resources. How many SMEs will be able to do the same? Both can find these resources in the cloud.

The survey reveals an appetite to grow the use of cloud. It got us out of a hole, for now. Business models have been shredded and now is a time of reinvention. Those already in the digital fast lane did well during this crisis. Those in the digital slow lane fared less well. For many it is time to play catch-up. Speed is of the essence and the survey calls out the cloud as the engine for transformation.

The dial has been turned upon the use of cloud. Will it be a case of, get on-board or get left behind? Might that signal a headline for CIF's 2021 report? Cloud nailed it, but not for everyone.

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¹ www.agcs.allianz.com/news-and-insights/reports/allianz-risk-barometer.html

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CLOUD INDUSTRY FORUM

About

The Cloud Industry Forum (CIF) was established in direct response to the evolving supply models for the delivery of software and IT services. Our aim is to provide clarity and advice for end users when assessing and selecting Cloud Service Providers based upon the clear, consistent and relevant provision of key information about the organisation/s, their capabilities and operational commitments.



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