

Cloud Migration Survey

Created for OpenText by
Custom Research
Center for Digital Government

Purpose

The Center for Digital Government was commissioned by OpenText to survey 110 state and local government leaders on the topic of cloud migration.

The goal was to capture market intelligence on cloud migration and to provide relevant data-points to be used for publishable reports and content messaging.

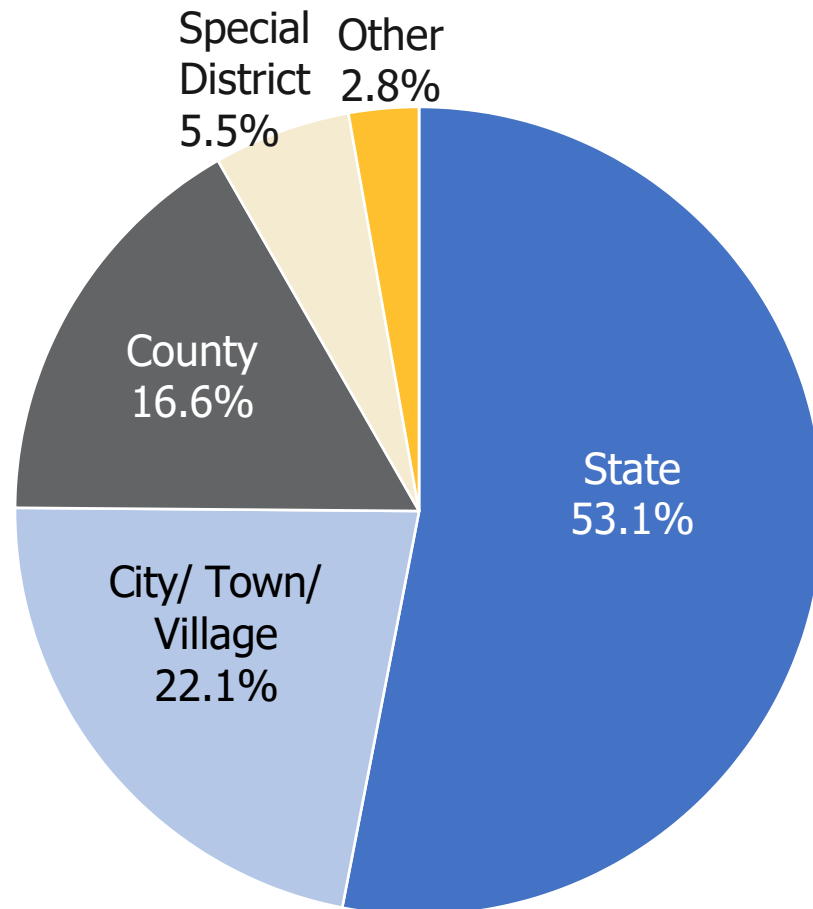
Methodology

In September and October 2021, the Center for Digital Government conducted a national survey of state and local government leaders and collected 145 responses.

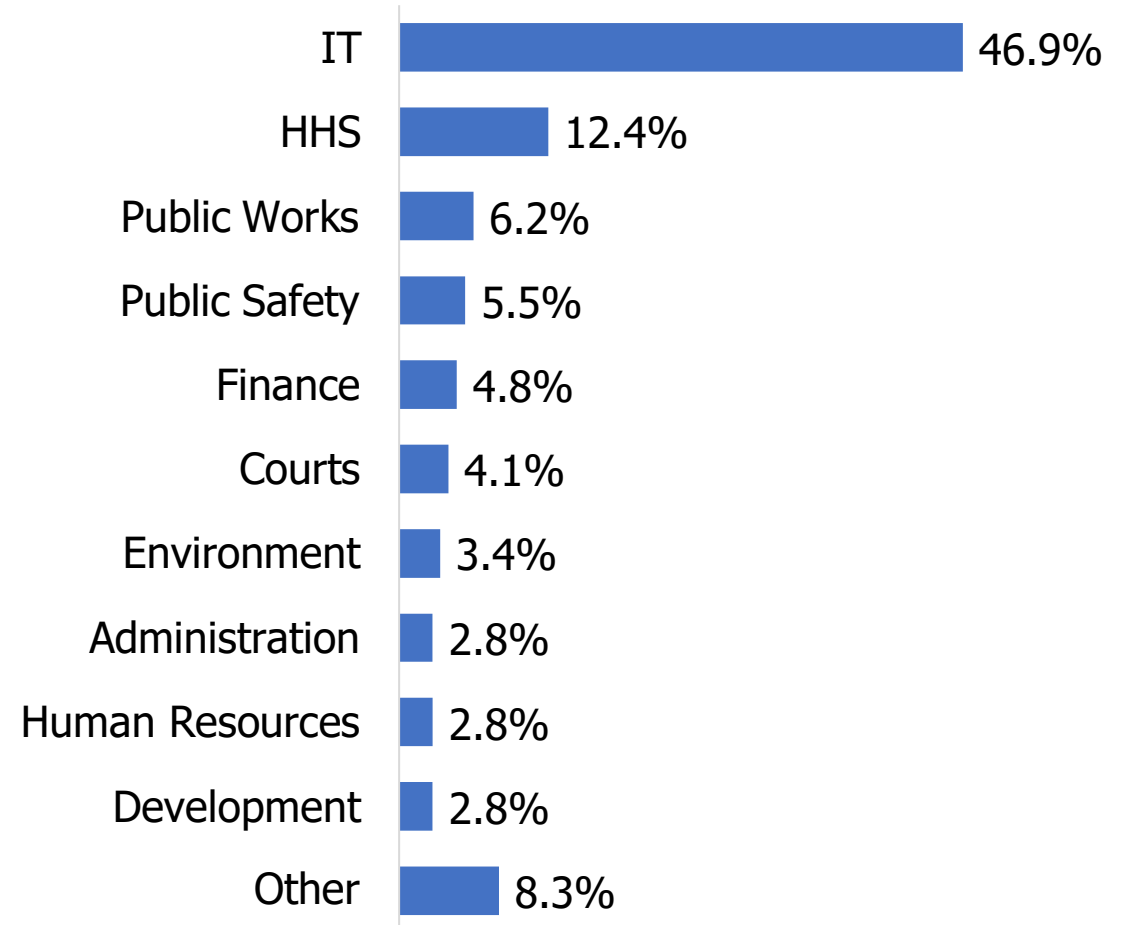
The survey included 13 questions that were designed in partnership with OpenText. These questions were analyzed to identify trends across key verticals, including levels of government, agency, or department types, and job roles.

Demographics

Branch of Government

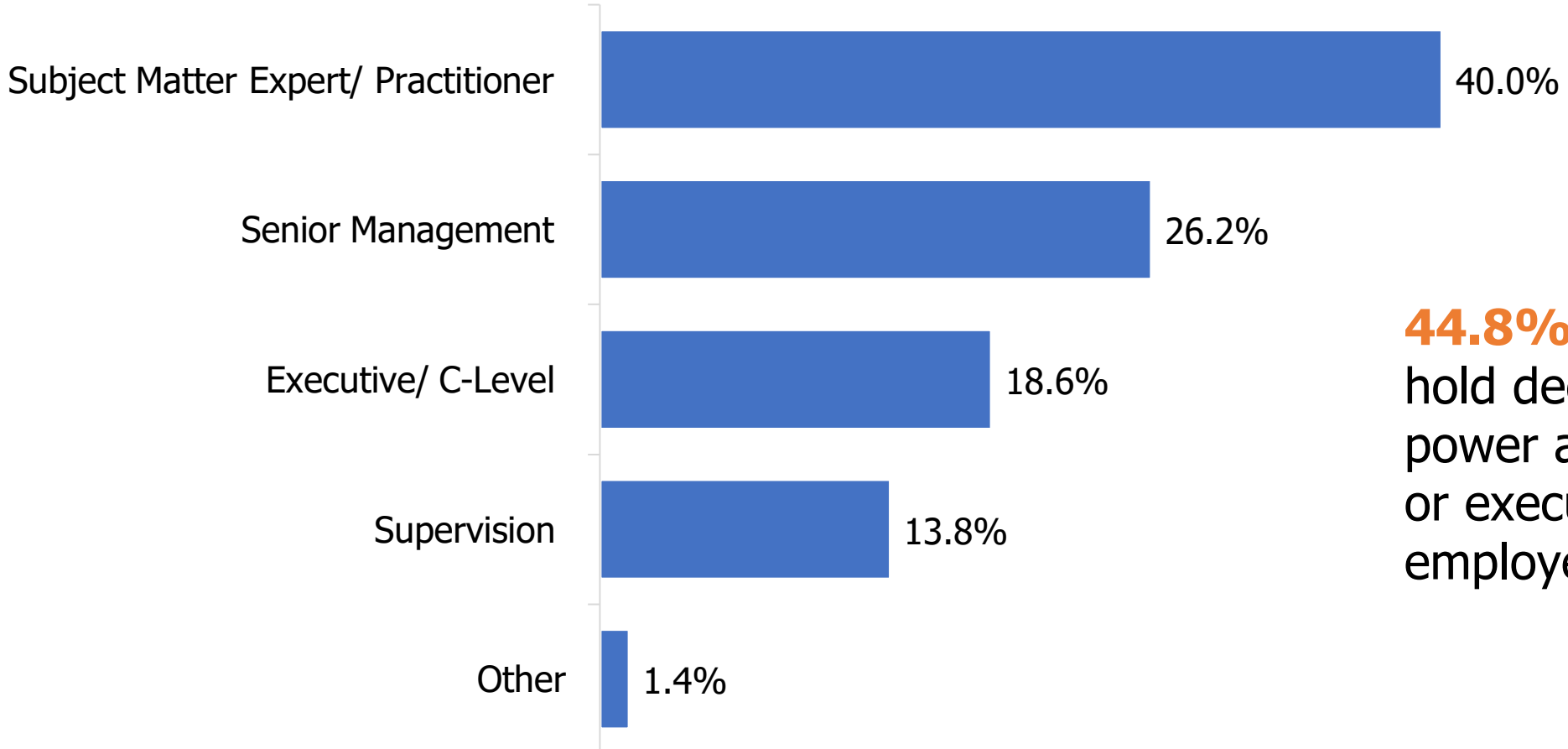


Agency or Department Function



Demographics

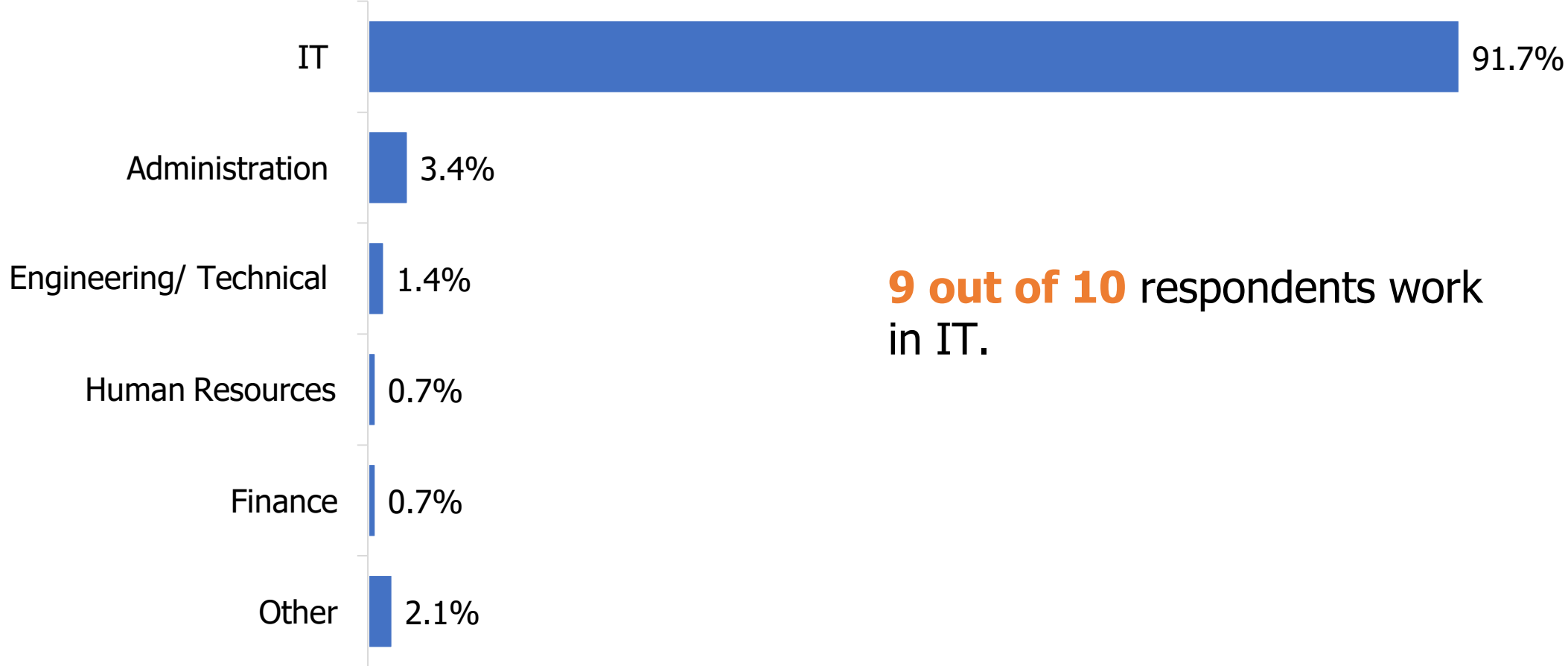
Job Role



44.8% of respondents hold decision-making power as senior managers or executives/c-level employees.

Demographics

Job Function



Cloud Migration

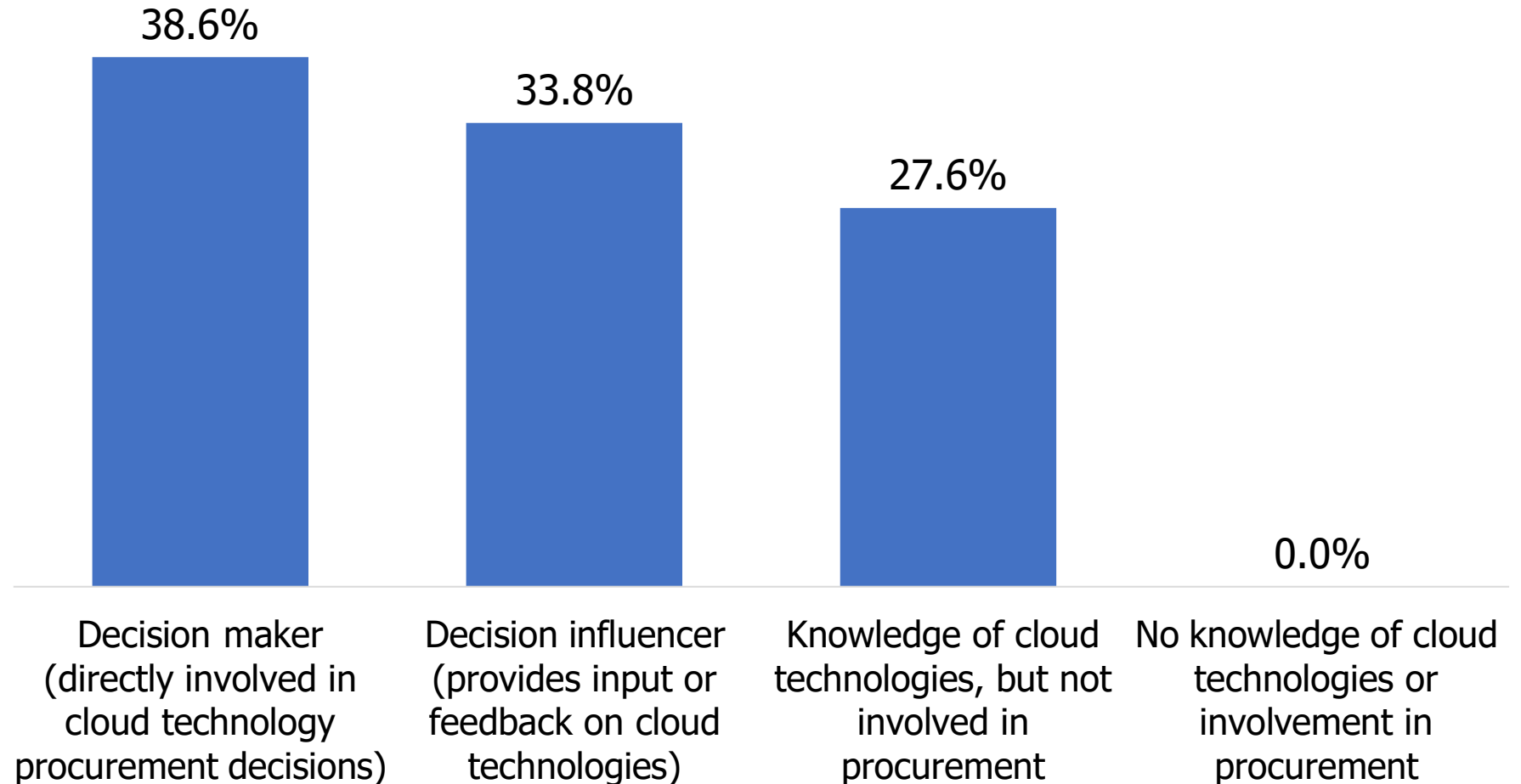
Key Findings

- **Existing Cloud Tools:** Respondents are most likely to have citizen-facing applications and collaboration tools primarily in the cloud.
- **Cloud Migration:** In the next 12-18 months, respondents will look to move citizen-facing web applications and back-office applications to the cloud.
- **Reasons for Cloud Migration:** Easy access is top of mind for respondents, who cite remote access and disaster recovery as drivers for cloud migration. They also cite improved access to content/services as the top benefit for constituents/citizens.
- **Training and Staff:** Around half of respondents have challenges with lack of qualified staff for cloud services. Around half also cite training for staff as the top way vendors can help to overcome challenges.

Which best describes your involvement in cloud technologies at your organization?

All respondents are knowledgeable about cloud technologies.

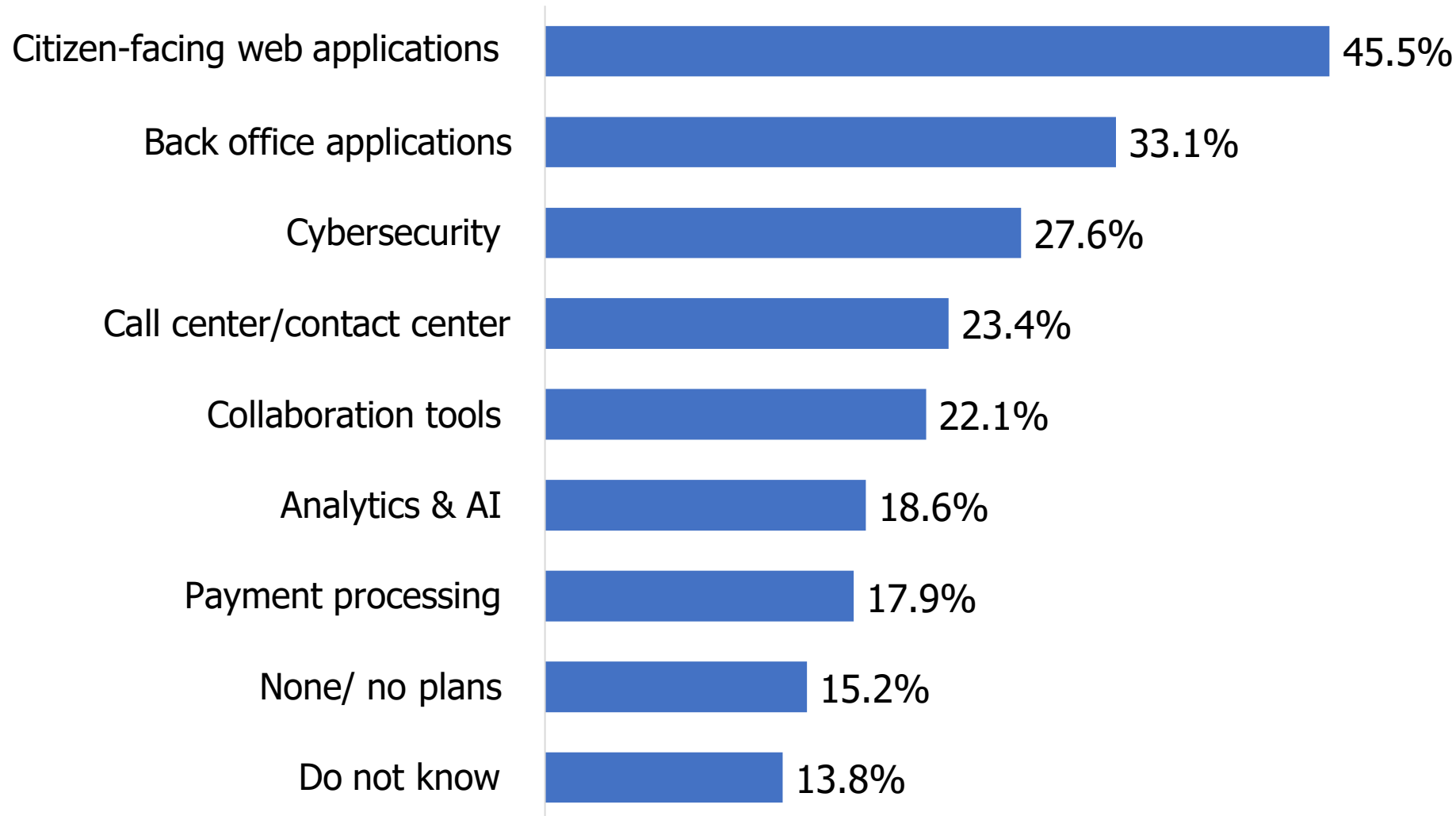
Around three quarters of respondents are involved in procurement.



Are any of the following applications/workloads located in the cloud in your organization?

	Primarily in the cloud (more than 50%)	Primarily not in the cloud (less than 50%)	Do not know
Citizen-facing web applications	41.4%	49.7%	9%
Cybersecurity	28.3%	56.6%	15.2%
Call center/contact center	24.1%	55.2%	20.7%
Collaboration tools	57.2%	33.8%	9.0%
Back office applications	27.6%	55.9%	16.6%
Payment processing	29.7%	49.0%	21.4%
Analytics & AI	23.4%	52.4%	24.1%

Are there plans to move any of the following applications/workloads to the cloud in the next 12-18 months at your organization? (Select all that apply)



Although citizen-facing web applications are the most likely to be moved to the cloud, **a third of respondents** are also looking to migrate back-office applications in the next 12-18 months.

More than 70% of respondents report plans to migrate some applications or workloads to the cloud in the next 12-18 months.



Easily Accessed Remotely (54.5%)



Disaster Recovery (51.7%)



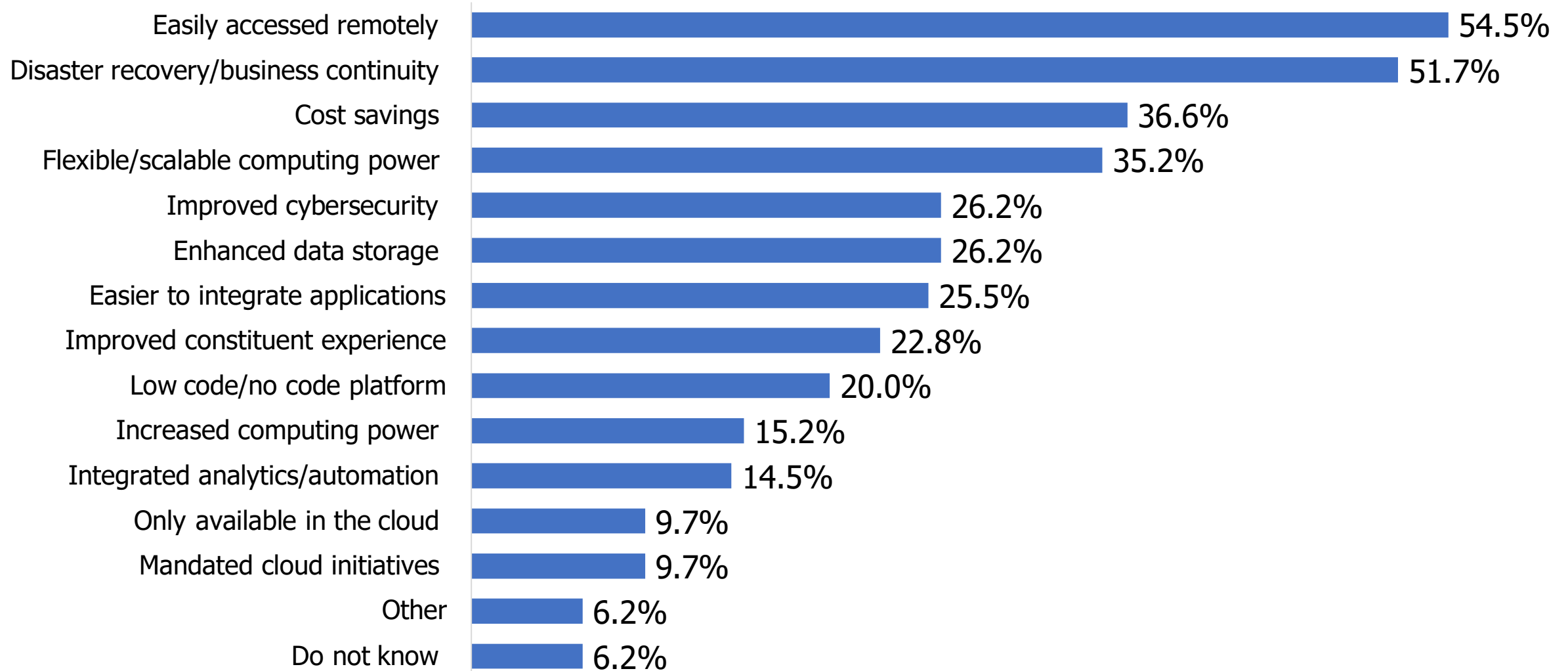
Cost Savings (36.6%)



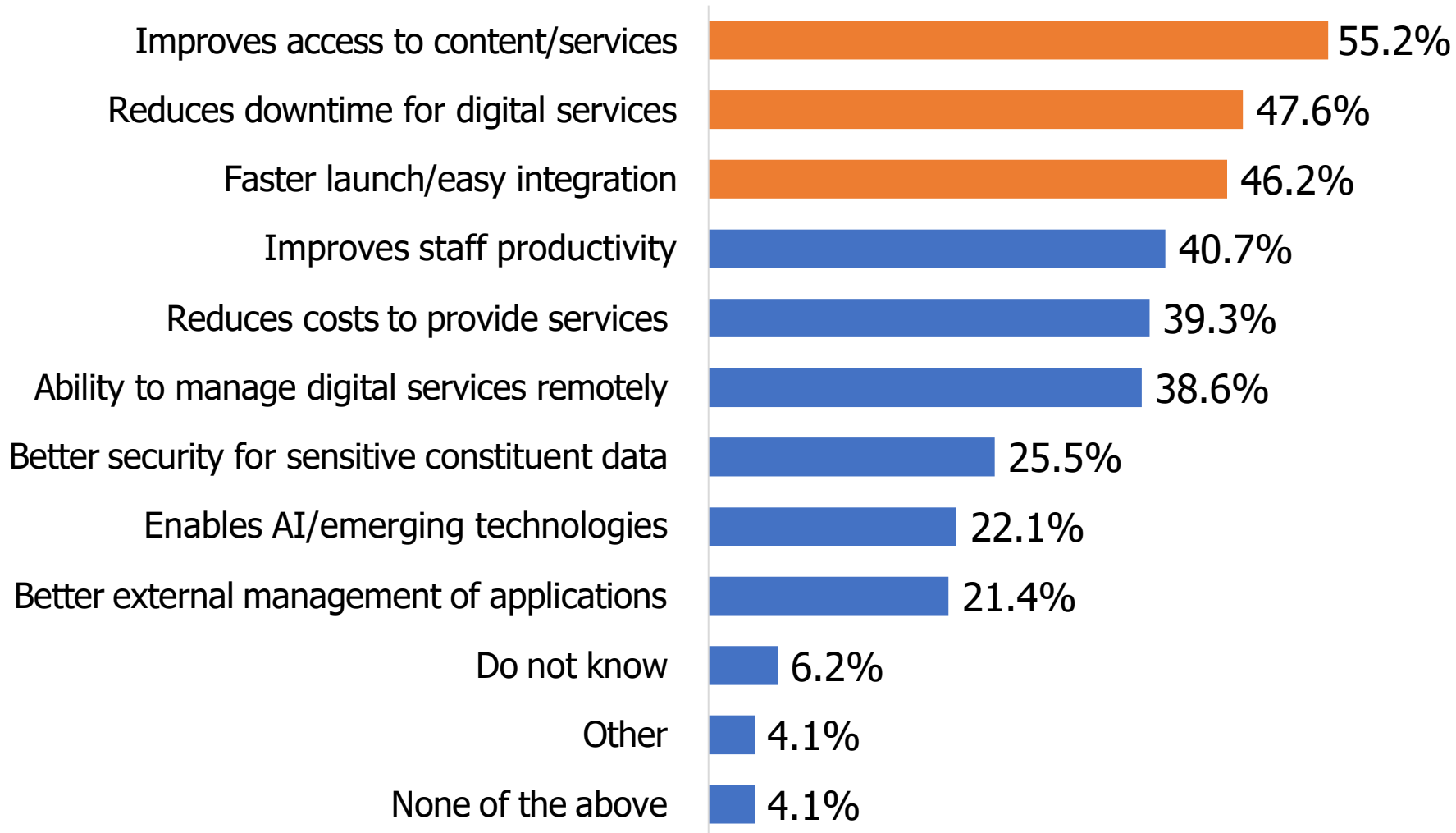
Flexible/Scalable Computing Power (35.2%)

Top drivers for Moving Applications and Workloads to the Cloud

What are the biggest drivers for moving applications/ workloads to the cloud? (Select up to 5)



How, if at all, do cloud technologies enable your organization to improve services and experiences for constituents? (Select all that apply)



The cloud has many major benefits for constituents according to respondents, **most often** around improving access, reducing downtime, and the ability to launch a service faster.

Where do you see the greatest potential for cloud technologies to improve employee and constituent experiences in your jurisdiction? (Optional)

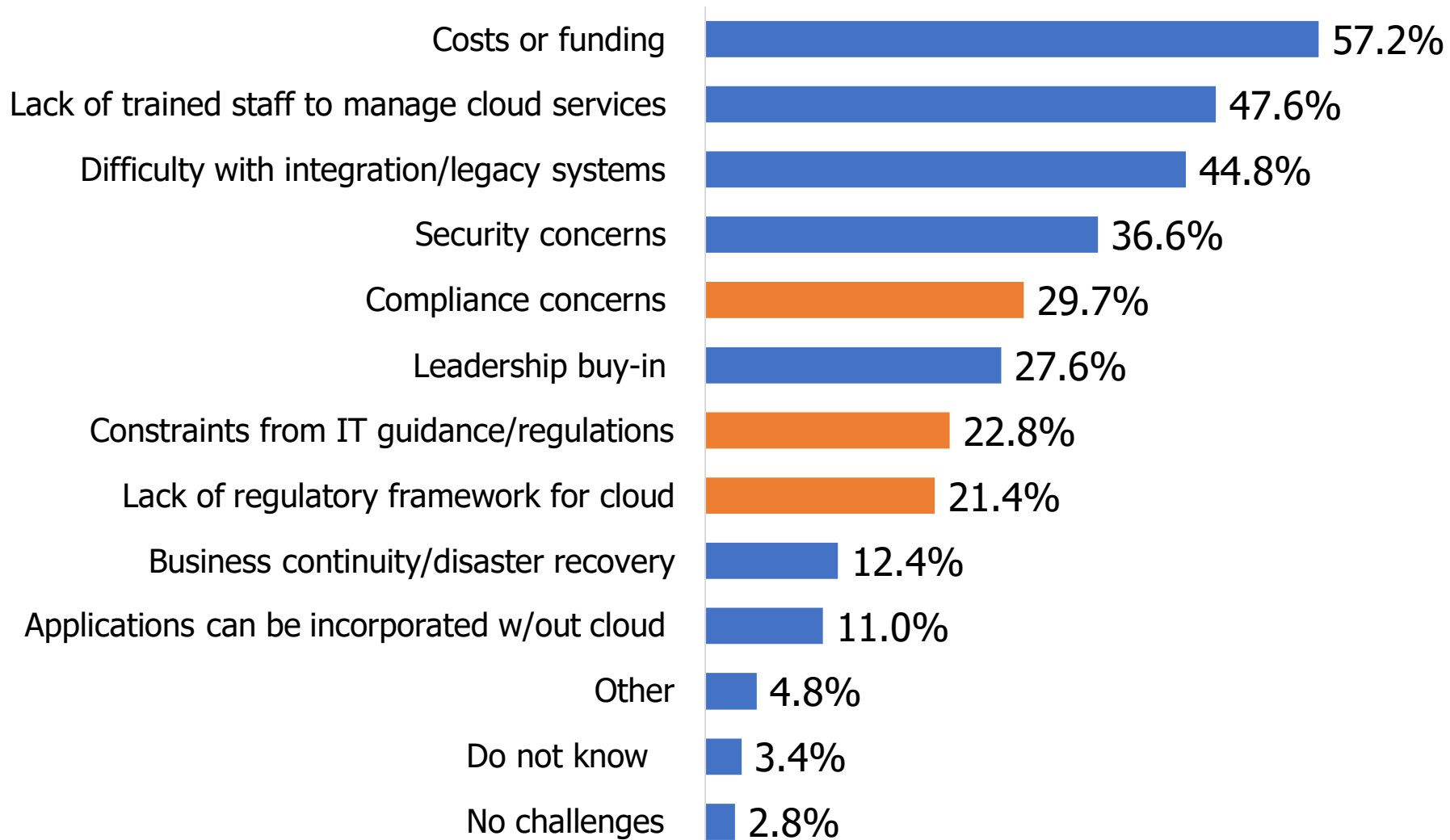
Flexibility 21.4%	Customer Service 19.6%	Back Office Applications 17.9%	Security 14.3%
"Flexibility" and ability to "scale as needed"	"improved user experience" and "a platform for citizens"	"email," "call center," and "phone systems"	"Citizens will know their data is secure"
Ease of Use 12.5%	No Plans Currently 7.1%	Analytics 3.6%	Unknown 3.6%
"improved usability"	"difficult because of the many vendors involved and prewritten software."	"data integration"	"Not sure"

N (Sample Size) = 56 Respondents



Respondents mention **flexibility and customer service** most often

What challenges, if any, does your organization face when adopting cloud technologies? (Select all that apply)



Around half of respondents have challenges with cost, training, or integration.

Around half (49.7%) of respondents also chose at least one of three challenges with regulation/compliance.

Top 3 Ways Partners Can Help with Challenges of Cloud Adoption



States

1. On-demand/ virtual training
2. Integration with legacy systems
3. More transparent cost structures



Counties

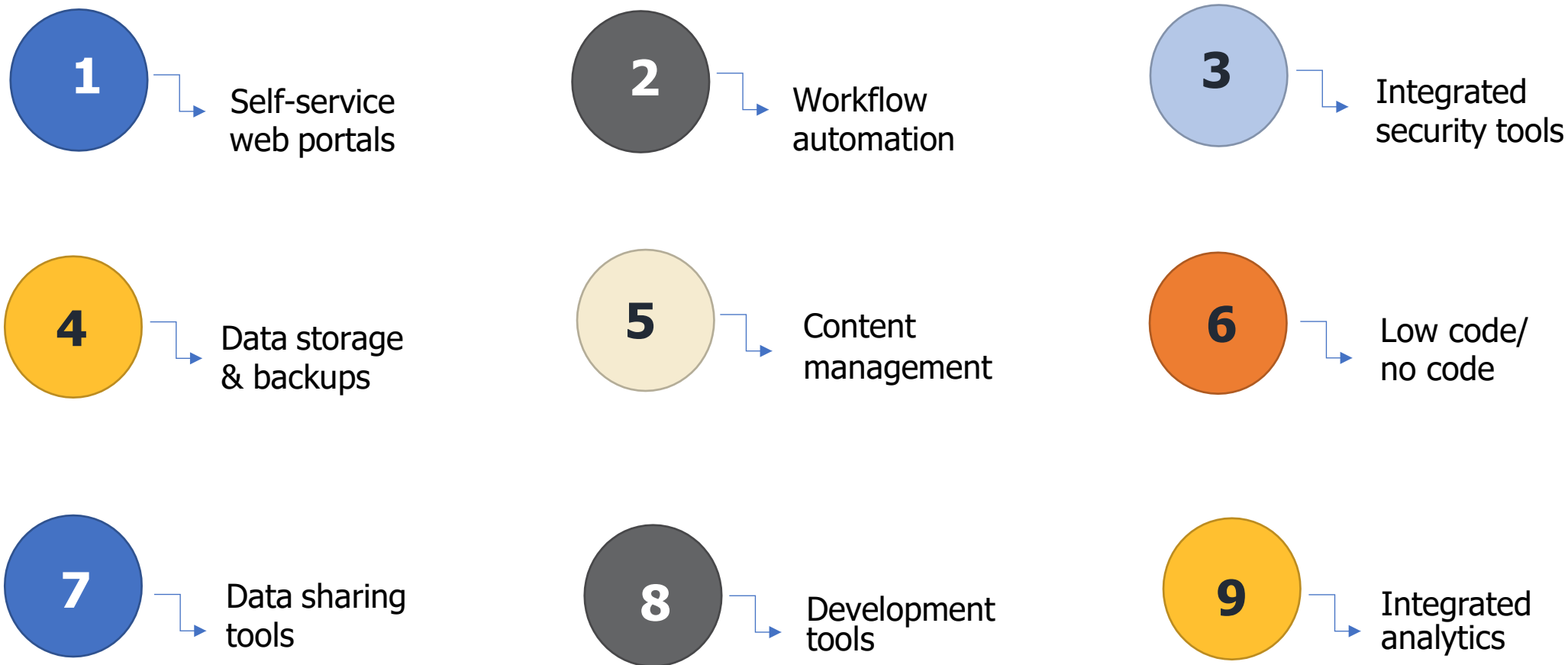
1. Integration with legacy systems
2. More transparent cost structures
3. Guidance on cost optimization



Cities

1. Expertise on cybersecurity
2. On-demand/ virtual training
3. 24/7 technical support

Top Features for Cloud Applications and Workloads



It was a surprise to see that cybersecurity was not a primary driver for moving to the cloud. We have been hearing that it as a primary driver, but it did not show up that way in the survey.

The data from the survey shows that products and services that are cloud-based are maturing rapidly and are becoming a primary place for government organizations to look for their next project. This has taken more than a decade to occur, and the private sector has moved much faster than government organizations. Today government IT leaders are not predominantly saying they are cloud-first, though some have said that, but it is clear that they are not averse to the cloud as many were no more than five years ago.

Thank you!

CENTER FOR
DIGITAL
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The Center for Digital Government is a division of e.Republic, the nation's only media and research company focused exclusively on state and local government and education. www.erepublic.com / <http://www.govtech.com>

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