



Cloud Computing Study

Executive summary outlining the 2022 EMEA research findings

As EMEA companies increasingly see value from cloud migration, they're pursuing a deliberate cloud-first or cloud-native approach to IT infrastructure.

Foundry's 2022 Cloud Computing Survey shows that IT leaders in Europe, the Middle East and Africa (EMEA) are far more likely (84%) than those elsewhere to have accelerated their cloud migration in the last 12 months.

The survey shows that most EMEA companies are defaulting to cloud-based services when upgrading or purchasing new technical capabilities (80% compared to 76% for North America companies and 59% for those in APAC). As a result, more than half (57%) of EMEA companies expect to be mostly or entirely in the cloud in the next 18 months, up from 46% today.

In addition, 80% of EMEA respondents agree that cloud capabilities helped their organization achieve increased and sustainable revenue over the last 12 months – and in the next 12 months, EMEA IT leaders plan to allocate an average of 29% of their IT budget to cloud spending – which is greater than 23% in APAC, however less than the 37% for North America organizations.

EMEA organizations will allocate an average of 29% of their IT budget to cloud computing over the next 12 months

80%

of EMEA organizations are defaulting to cloud-based services when upgrading or purchasing new technical capabilities

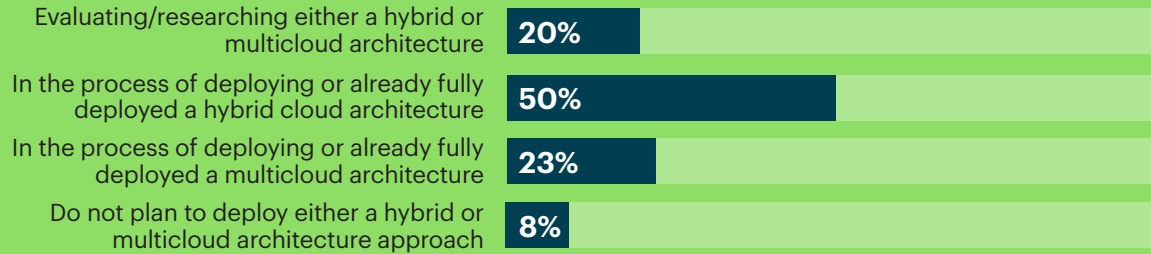
Migration strategies

The vast majority (80%) of EMEA companies are defaulting to cloud-based services for upgrades and new technical capabilities. Among applications already in the cloud, 50% at EMEA companies are purpose-built for the cloud, while 50% were moved into the cloud from an on-premises environment. By comparison, the average respondent worldwide says 44% of their cloud apps were purpose-built and 56% were moved off-premises.

Over the next 12 months, 39% of EMEA IT leaders plan to extend their on-premises environments by migrating core applications with a hybrid cloud approach. Another 28% are rebuilding or refactoring a majority of their existing applications for the cloud to support a “cloud-first” strategy, while 27% are rebuilding or refactoring a few targeted applications to be hosted by a single cloud provider. Only 3% don't know yet what their migration plans are, and the remaining 3% have no plans.

On average, two-thirds (67%) of EMEA organizations' public cloud deployments currently leverage a single cloud provider – greater than the global average of 63% – while only 3% have no public cloud deployments at all, compared to 10% globally.

Hybrid and multicloud intentions in EMEA



In addition, EMEA IT leaders are farther along than others in their consideration of hybrid or multicloud architecture. While 36% of organizations globally are evaluating or researching one or the other, that’s only true of 20% of EMEA organizations. Instead, half (50%) of EMEA respondents are currently deploying or have already deployed hybrid cloud, compared to 29% globally. Another 23% are deploying or have already deployed multicloud, compared to 18% globally. Furthermore, EMEA companies are much less likely (8%) than those in North America (19%) or APAC (21%) to say they do not plan to deploy either a hybrid or a multicloud architecture approach.

Given their comparative enthusiasm for multicloud architecture, EMEA IT leaders see multiple potential benefits to adopting it. In particular, they anticipate greater platform flexibility (52%), improving disaster recovery/business continuity (46%), cost savings/optimization (45%), and performance/latency optimization (44%). Interestingly, only 35% of EMEA respondents mentioned the desire to avoid vendor lock-in, the top priority globally (50%).

EMEA companies that have already deployed multicloud architecture are also enthusiastic about the results, citing an average of 3.4 benefits compared to the global average of 2.7 benefits. They’re more than twice as likely (70%) as companies in APAC (32%) or North America (34%) to be seeing cost savings as a result of adopting multicloud. Additionally, the benefits they anticipated largely align with the benefits they’re receiving: 67% have

achieved greater platform and service flexibility, 48% are enjoying best of breed platform and service options, 44% have improved disaster recovery/business continuity, and 41% have successfully optimized performance and latency.

Benefits EMEA organizations have seen from multicloud

- 70%** Cost savings/optimization
- 67%** Greater platform and service flexibility
- 48%** Best of breed platform and service options

Motivations and challenges

EMEA IT leaders are predominantly driven to invest in cloud to improve business performance. Their **top priorities are:**

- improving employee productivity (36%)
- lower TCO (32%)
- greater flexibility to react to changing market conditions (32%)
- development of new products or services (32%)
- enabling innovation (30%)

In addition, they're significantly more likely than leaders in other regions to say they're addressing the need for real time information, expanding revenue opportunities, and pursuing faster ROI.

EMEA IT leaders believe the top growth areas for cloud are Software-as-a-Service (48%) and Platform-as-a-Service (38%), followed by a tie among Security-as-a-Service, Infrastructure-as-a-Service, and cloud-based analytics (34%). There's also one striking split within the region: more than half (52%) of respondents in Germany call Platform-as-a-Service a top growth area, which makes them more like their peers in South Korea (53%) than in the UK (18%).

As with every region, almost all EMEA IT leaders (97%) report facing significant challenges to implementing their cloud strategy. Three of their top four **concerns involve security:**

- data privacy and security challenges (36%)
- lack of cloud security skills/expertise (31%)
- securing and protecting cloud resources (27%)

More than three-quarters (78%) of EMEA IT leaders who have completed a migration to multicloud say that they've experienced one or more significant downsides to migration, primarily involving increased complexity and security risk (both at 44%), followed by increased cost of training and hiring (41%).

The skills gap is an ongoing challenge for EMEA respondents. During implementation, 31% say they struggle with lack of cloud security skills/expertise, 22% with lack of cloud management skills/expertise, and 21% with finding staff with cloud development skills/expertise, and after migration, 41% call the increased cost of training and hiring a significant downside.

91%

of EMEA organizations have added new roles and functions as a result of their cloud investments

Top EMEA cloud growth areas

- Software-as-a-Service
- Platform-as-a-Service
- Cloud-based analytics
- Infrastructure-as-a-Service
- Security-as-a-Service

However, the skills gap is not unbridgeable: 91% of EMEA respondents have **added new roles and functions** as a result of their cloud investment, compared to 79% globally. In particular, they have added:

- cloud systems administrators (37%)
- cloud software engineers (31%)
- cloud architects, security architects, cloud developers and data architects (all 26%)

EMEA companies are more likely (26%) to have added data architects than companies in North America (16%) or APAC (12%).

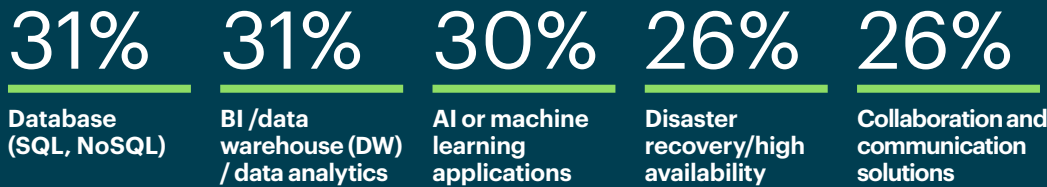
A forward-thinking region

EMEA companies are far ahead of other regions in planning to migrate, currently migrating, or already having migrated certain advanced workloads. These include identity and access management, mobile applications, content delivery/media processing, Internet of Things connectivity and management, and AI or machine learning applications.

The top areas in which EMEA companies are currently migrating or have already deployed applications to the cloud are identity and access management (45%), websites/web apps (41%), storage/archive/backup/file server (41%), mobile apps (40%) and collaboration and communications software (39%).

EMEA IT leaders are significantly more likely than others to be planning migration projects for the near future. In the next 12 months, their top targets for

Planning to migrate to the cloud in the next 12 months



migration are databases (31%), BI/data warehouse/ data analytics (31%), AI or machine learning applications (30%), disaster recovery/high availability (26%), and collaboration and communication solutions (26%). For context, no more than 21% of companies in other regions have plans to migrate any given workload in the next year.

Globally, the top applications companies plan to migrate in the next 1 to 3 years are data integration (22%), BI/data warehouse/data analytics (21%), and disaster recovery/high availability (21%). For EMEA companies, it's Internet of Things connectivity and management (19%), development/test (17%), and API management (16%).

EMEA is also the only region in which more than 10% of respondents are moving or planning to move a workload out of the cloud, particularly BI/data warehouse/data analytics (12%), websites/web apps (11%), identity and access management (11%), and content delivery/media processing (11%).

Finally, EMEA organizations are significantly less likely than others to say they have no plans to migrate any given workload. This suggests that EMEA IT leaders may be more inclined to see cloud migration as key in every area.

Support and influence

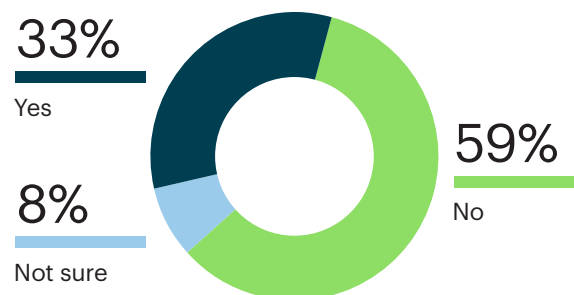
Among EMEA respondents who use multiple cloud providers, the majority (59%) are definite in saying that they do not consider any one of them a strategic

partner – significantly more than their peers in APAC (44%) and North America (40%). Another 33% say they do consider one of their cloud providers a strategic partner, while only 8% say they're unsure.

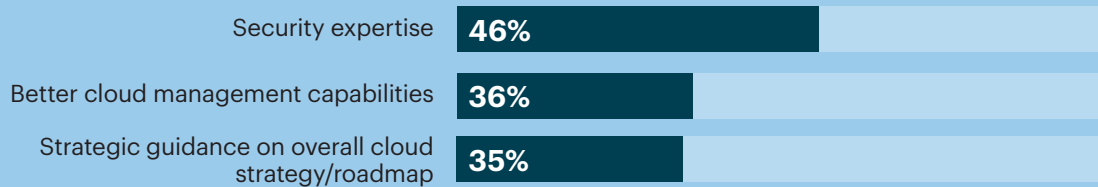
Nonetheless, EMEA IT leaders are equally likely to say that systems integrators (43%) and managed service providers (43%) influence cloud purchase decisions at their organization. They're also more than twice as likely (34%) as leaders in APAC (18%) or North America (9%) to say that cloud brokers are influential.

As for what they need and expect from current and future cloud providers in order to successfully advance their cloud strategy, EMEA ITDMs are

Do EMEA ITDMs consider one cloud provider to be a strategic partner?



Assistance needed from cloud providers in EMEA



looking for security expertise (46%), better cloud management capabilities (36%), strategic guidance on overall cloud strategy/roadmap (35%), training/support services (33%), and commitment to standards (33%). Notably, EMEA companies lack interest in cost management capabilities, with only 26% of respondents citing it as a priority compared to 41% in APAC and 40% in North America.

Conclusions

Some key takeaways from the EMEA specific study for technology marketers to be aware of in order to properly execute their marketing strategy are:

- **EMEA organizations have accelerated their cloud migration over the past 12 months.**

As tech marketers, it's important to provide educational resources while these IT leaders navigate the journey.

- **Understand the business objectives driving cloud investments in EMEA**, which are – improving employee productivity, lower total cost of ownership, greater flexibility to react to changing market conditions, and development of new products or services.
- **EMEA ITDMs are considering migrating a variety of applications and services to the cloud** over the next three years. To do this effectively, they are looking for strategic guidance from cloud vendors.
- **The majority of EMEA organizations have experienced challenges** with implementing their cloud strategy. Be sure to have a grasp of these obstacles, how the organization is combating these themselves, and how you as a technology vendor can help.

About the survey

Released under the IDG Communications, Inc. brand for past iterations, Foundry's 2022 Cloud Computing Survey was conducted to measure cloud computing trends among technology decision-makers including: usage and plans across various cloud service and deployment models, investments, business drivers and impact on business strategy and plans. The study was fielded throughout February 2022 and is based off of the responses of 850 global IT decision-makers that are involved in the purchase process for cloud computing and their organization has, or plans to have, at least one application, or a portion of their infrastructure, in the cloud.

Examining the marketplace

Research is an invaluable way for marketers to better understand customers and prospects, with the goal of building quality connections. At Foundry this is one way we are focused on building bridges between tech buyers and sellers. Our first-party relationships with the most important tech buyers and influencers around the world, allows us to apply value across our customers marketing stack. Our research portfolio explores our audiences' perspectives and challenges around specific technologies — from analytics and cloud, to IoT and security — and examines the changing roles within the IT purchase process, arming tech marketers with the information they need to identify opportunities.

To see what research is available, visit [FoundryCo.com/tools-for-marketers](https://foundryco.com/tools-for-marketers). For a presentation of full results from any of these studies, contact your Foundry sales executive or go to [FoundryCo.com/contact-us](https://foundryco.com/contact-us).

Buying process

Each year we take a deep dive into the enterprise IT purchase process to learn more about who is involved and who influences decision-making, what sources purchasers rely on to keep up to date with technology — and throughout the purchase process — and how they want to engage with the vendors they are working with. Visit [FoundryCo.com/customerjourney](https://foundryco.com/customerjourney) for more information.

Role and Influence of the Technology Decision-Maker

This survey is conducted to gain insight into the evolving role and influence of IT decision-makers in today's corporations. The research identifies key decision-makers and examines their involvement during each stage of the tech purchase process and the primary influences and information sources they rely on.

Customer Engagement

This survey examines the role content consumption plays in the purchase process for major technology products and services, and provides insights for tech marketers to map their engagement touch-points to customers' information needs. The survey looks at how a wide variety of content types are consumed, discussed and shared throughout the stages of the tech purchase process and how that maps to marketing and sales alignment.

Technology insights

Each year we explore the technologies that are top of mind among our audiences to understand the business challenges, drivers, and adoption within the enterprise. These research studies are designed to help IT marketers understand what their customers are focused on and where the market is moving.

Role and priority studies

- CIO Tech Poll: Tech Priorities
- State of the CIO

Technology-specific studies

- Data & Analytics
- Cloud Computing
- Digital Business
- Security Priorities

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