NUTANIX

Fourth Annual Report

India Sees Rapid Adoption of Multicloud with Focus on Remote Work Support

Fourth Annual Enterprise Cloud Index (ECI) research indicates that the adoption of multiple clouds, private or public, is rigorously underway. Fueling it has been enterprises' realization that to meet each workload's specific requirements for security, performance, cost, business continuity, and other factors, they must match each application to the infrastructure best suited to it. This selective optimization requires the availability of multiple IT environments, both private and public.

Respondents in India generally followed the upward multicloud trend. What follows is a closer look at ECI findings in India and how they compare to other regions.

About this Report

In August and September 2021, researcher Vanson Bourne surveyed 1,700 IT decision-makers around the world about where they're running their business applications today, where they plan to run them in the future, what their cloud challenges are, and how their cloud initiatives stack up against other IT projects and priorities.

This report is supplemental to the global Fourth Annual Enterprise Cloud Index master report and focuses on cloud deployment and planning trends in India. It highlights how the cloud plans, priorities, and experiences of respondents there compare to other countries in the Asia-Pacific (APAC) region and around the world.

1 About a third of respondents in India have adopted multicloud, the most widely deployed IT operating model, and remote work is a key driver

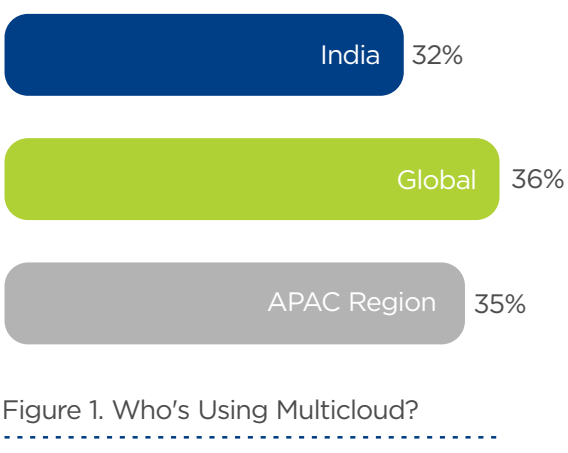


Figure 1. Who's Using Multicloud?

While the use of multiple clouds, private or public, isn't quite as high in India as elsewhere, it's the country's leading IT infrastructure deployment model. Nearly a third (32%) of respondents in India said multicloud is their most commonly used environment (Figure 1), followed by traditional datacenters (29%) and private clouds (23%). More than half in India (58%) expect to support multicloud within three years.

Helping fuel the multicloud trend is the growing acceptance of the public cloud as an extension to private infrastructure and as a critical platform for supporting the shift to remote work. Nearly one in five respondents from India (19%), for example, said they already use three or more public cloud providers, outpacing the global (13%) and APAC regional averages (12%).

The same percentage in India (19%) said all their employees currently work remotely, significantly more than the global (7%) and APAC (8%) averages. Nearly half (46%) in India said their expected multicloud growth in the next three years would be driven by this factor, and 60% said remote work solutions such as virtual desktops are important to their organizations today.

2 As multicloud deployment accelerates, so does the importance of application mobility and cloud interoperability.

The trend toward continuous, "cloud-smart" workload optimization requires enterprises to move apps among infrastructures as IT requirements and business objectives change. In that spirit, most enterprises surveyed in India (93%) said they have moved at least one application to a different infrastructure in the past year. They cite security and compliance (55%) as the prevailing reason (Figure 2), followed by improving data access speeds (49%), gaining better control of the application (48%), and integration with cloud-native applications (48%).

Figure 2. Top Reasons for Moving Applications to a Different Infrastructure

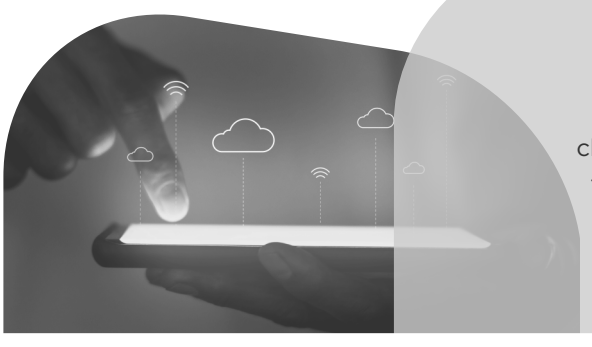
	India	Global	APAC
Security/compliance	55%	41%	45%
Improved data access speeds	49%	39%	42%
Better control of the app	48%	38%	41%
Integration with cloud-native apps like AI/ML	48%	34%	38%

As the figure shows, enterprises elsewhere had similar reasons for moving applications though the percentages citing each reason were less dramatic. For example, India outpaced the global average when it came to security/compliance by 14 percentage points and the APAC regional average by 10 points. It outpaced the other three application mobility drivers by similar margins.

State of cloud flexibility. While application mobility is a critical multicloud enabler, ECI respondents generally tend to perceive it as a costly and time-consuming undertaking. The majority of respondents in India (83%), globally (80%), and throughout the APAC region (81%) agreed on this point. From an interoperability standpoint, less than a third of respondents from India (28%) described their dissimilar cloud environments as "fully interoperable," compared to 36% of global respondents and 41% of those from APAC. Progress is afoot, however: more than half (56%) from India cited "some level of interoperability" among clouds, and global (56%) and APAC (51%) respondents indicated similar experiences.

Market need. The results underscore the growing requirement for hybrid multicloud software tools that unify and, to a degree, automate processes across dissimilar cloud platforms. Containerizing applications with all their dependencies, for example, facilitates the application mobility process. Accordingly, 57% of respondents from India agreed that containers, which package an application and all its dependencies together to enable seamless mobility across clouds, are important to their organizations today. So did 45% of those globally and 50% in the APAC region.

3 Among multicloud challenges, security continues to dominate



As multicloud adoption rises, new challenges emerge and old ones persevere. Security issues continued to figure prominently on all respondents' lists this year. India cited security slightly more often as "one of the biggest multicloud management challenges" than respondents elsewhere (Figure 3). Respondents from India also often cited challenges with managing data, cost, performance, and capacity across dissimilar clouds, as did enterprises in other regions.

Figure 3. Top Multicloud Challenges

	India	Global	APAC
Security concerns	50%	49%	49%
Integrating data across different cloud environments	46%	49%	48%
Managing costs across environments	45%	43%	42%
Performance challenges	44%	42%	43%
Capacity planning across different infrastructures	42%	38%	40%

Multicloud management and security outlook. The continued emergence of hybrid multicloud tools that abstract data and applications from underlying cloud platforms to enable centralized management across dissimilar clouds will alleviate many of these issues. Accordingly, most respondents named hybrid multicloud as the ideal operating model for their environments: 84% from India agreed, as did 83% globally and 82% across the APAC region.

IT security, however, is a living, ongoing discipline that's never a fait accompli; cyber-threats tend to remain a heartbeat ahead of the latest defenses, regardless of the infrastructure type(s) in use. As such, security is likely to stay top of mind in all enterprises indefinitely. However, the availability of hybrid tools that enable them to build and enforce top-down policies across cloud environments will level the playing field, eventually allowing equal levels of defense regardless of infrastructure.

Summary and Conclusions

Companies in India are in the thick of the multicloud migration trend, and remote work support is a primary driver. Like their global and regional peers, they acknowledge potential hurdles with multicloud management, security, and application mobility as they ramp up adoption. These concerns represent an urgency for hybrid multicloud tools that provide unified visibility, security, and control of the entire IT infrastructure of private and public clouds. Security, integrating data across clouds, and controlling cross-cloud costs, performance, and capacity top India's list of cloud management challenges. These should abate as centralized, cloud-agnostic tools and container solutions grow increasingly available.