



## HashiCorp 2023 State of Cloud Strategy Survey: Asia-Pacific Region

# Cloud maturity drives operational efficiency

Cloud-mature companies in the Asia-Pacific region improved their business outcomes with respect to speed, risk, and efficiency.



The third annual HashiCorp State of Cloud Strategy Survey reveals the continued evolution of enterprise cloud strategy in the Asia-Pacific region. The [2021 survey](#) welcomed enterprises to the multi-cloud era, demonstrating the prevalence of a common multi-cloud operating model. The [2022 results](#) reiterated those findings and underscored how a multi-cloud approach is delivering meaningful business value.

This year, the survey investigates **operational cloud maturity** — defined not by the *amount* of cloud usage, but by adoption of a combination of technology and organizational best practices at scale, covering infrastructure, security, networking, applications, and their use of platform teams. For 2023, we once again commissioned Forrester Consulting to perform the survey. In addition, we worked with Forrester to develop a cloud maturity model for describing where organizations are in their cloud adoption journey: low maturity, those experimenting with these practices; medium maturity, organizations standardizing their use of these practices; and high maturity, organizations that are scaling these practices broadly. You can see the results of the global survey and access the full Forrester Consulting study <https://www.hashicorp.com/state-of-the-cloud>. This summary paper shares **key results specifically for the Asia-Pacific region**.

The results from 233 respondents in APJ were clear: Organizations demonstrating the most maturity are also the ones unlocking the most value from their cloud efforts. Mature cloud practices were strongly correlated with **positive business outcomes with respect to speed, risk, and efficiency**.

Specifically, **high-maturity companies** were *more likely* to report that they were **boosting their cloud spending** and also that **the cloud was saving them money**. Not coincidentally, highly mature organizations were also *less likely* to waste money on avoidable cloud spending. Highly mature companies had an **easier time dealing with cloud security issues and coping**

**with the ongoing shortage of cloud skills.** This process of **maturing cloud practices is often driven by cloud platform teams** that centralize and standardize infrastructure and application services as well as best practices — including widespread automation, infrastructure as code, self-service infrastructure, CI/CD, site reliability engineering, observability, dynamic secrets management, and more — across the entire organization.

On the flip side, **less mature organizations struggled to implement their cloud operating model, scale their multi-cloud adoption, and achieve business success.**

**55%** of Asia-Pacific respondents boosted their cloud spending


Despite worldwide macroeconomic uncertainty, more than half (55%) of Asia-Pacific survey respondents actually increased their cloud spending in the last 12 months. Just over a quarter (26%) cut their spending. Even more notably, 62% of respondents from high-maturity organizations in the Asia-Pacific region boosted their spending, compared to just 43% of low-maturity Asia-Pacific organizations. Some of these increases are no doubt due to inflation, but even as companies work to improve governance, risk management, and compliance (GRC) to cut waste with individual cloud service providers, the secular trend is so powerful that their overall cloud investments continue to grow.

**93%** of Asia-Pacific respondents say multi-cloud works, or is expected to in the next year

70% of Asia-Pacific respondents say their multi-cloud strategy has already advanced or achieved their company's business goals, and another 23% expect it to do so in the next 12 months. Significantly, multi-cloud works for 96% of high-maturity Asia-Pacific respondents, with 80% saying it is already working and another 16% expecting it to within a year.

**56%** of Asia-Pacific organizations are using multi-cloud to save money

Cost reduction was tied for the most commonly cited multi-cloud driver (56%) in the Asia-Pacific region, matching reliability (56%) and topping digital transformation (51%). Not surprisingly in these times of macroeconomic disruption, cost reduction charted much higher this year than it did in 2022.

 If anything the macro economic environment is indicating we should minimize long term commitments for DC and hardware and leverage IaaS solutions. — *Vice President of Cloud at an Asia-Pacific technology company*

Due to the current macroeconomic environment, my organization has increased the use of cloud-based services and products. — *Vice President of Cloud at an Asia-Pacific technology company*

# #1 rank of security as a multi-cloud success factor in the Asia-Pacific region

90% of Asia-Pacific respondents called security an important (27%) or very important (63%) factor in multi-cloud success — more often than any other factor. Notably, however, every one of the 12 choices presented — from availability to breaking down silos — were called important or very important by more than three quarters of Asia-Pacific respondents.

# #1 rank of skills shortages as a multi-cloud barrier in the Asia-Pacific region

The ongoing shortage of skilled cloud talent is a critical but complex issue for companies across the entire maturity spectrum. So it follows that skills shortages was the most commonly named factor complicating Asia-Pacific organizations' ability to operationalize multi-cloud, cited by 31% of respondents. In related results, the lack of necessary staff/skills was the third-most commonly cited internal security threat in Asia-Pacific, behind only data privacy/protection and threat detection/remediation — up from a fifth-place overall ranking in our 2022 survey. Low maturity Asia-Pacific organizations, meanwhile, were even more likely to cite skills issues as an internal threat: 47% compared to 42% for high maturity organizations.

# 71% of Asia-Pacific companies say multi-cloud helps them attract, motivate, and retain talent

In addition, another 14% of Asia-Pacific respondents expect their multi-cloud strategy to help them with their talent issues in the next year. Importantly, 78% of highly mature organizations in Asia-Pacific gained staffing benefits from multi-cloud, compared to just 56% of low-maturity Asia-Pacific respondents.

# 95% of respondents in the Asia-Pacific region are adopting, standardizing, or scaling platform teams

Among Asia-Pacific respondents, 13% are adopting, 41% are standardizing, and 41% are scaling their use of platform teams across the organization.

Our platform team serves as the enablers helping developers gain the tools we need to carry out our daily tasks. Besides support, they are also domain experts, especially in the aspects of security and networking and help guide the organization towards using the best practices. — *Director of Information Technology at an Asia-Pacific media company*

The platform team at my company helps us continuously set a north star for operational excellence as well as round the clock resiliency of our cloud resources. — *Director, Cloud Center of Excellence at an Asia-Pacific retailer*

For more details and worldwide results from this year's survey and to download the Forrester Consulting study, visit [www.hashicorp.com/state-of-the-cloud](http://www.hashicorp.com/state-of-the-cloud).