



HashiCorp 2023 State of Cloud Strategy Survey:
Europe, Middle East, Africa

Cloud maturity drives operational efficiency

Cloud-mature companies in EMEA 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 Europe, the Middle East, and Africa. 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 at <https://www.hashicorp.com/state-of-the-cloud>. This summary paper shares **key results specifically for Europe, the Middle East, and Africa** (EMEA).

The results from 323 respondents in EMEA 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.**

54% of EMEA respondents boosted their cloud spending

Despite worldwide macroeconomic uncertainty, more than half (54%) of EMEA survey respondents actually increased their cloud spending in the last 12 months. Less than a quarter (23%) cut their spending. Even more notably, 62% of respondents from high-maturity organizations in EMEA boosted their spending, compared to just 43% of low-maturity EMEA 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.

89% of EMEA respondents say multi-cloud works, or is expected to within a year

Almost three quarters (72%) of EMEA respondents say their multi-cloud strategy has already advanced or achieved their company's business goals, and another 17% expect it to do so in the next 12 months. And multi-cloud works for 92% of high-maturity EMEA respondents, with 75% saying it is already working and another 17% expecting it to within a year.

42% of EMEA organizations are using multi-cloud to save money

Cost reduction was the fifth most commonly cited multi-cloud driver (42%) in EMEA, trailing reliability (50%), security and governance (48%), digital transformation (46%), and freedom to choose best-fit services (43%). And high-maturity EMEA respondents were even more likely (47%) to cite multi-cloud cost savings. Not surprisingly in these times of macroeconomic disruption, cost reduction charted much higher this year than it did in 2022.


#1 rank of skills shortages as a multi-cloud barrier in EMEA

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 EMEA organizations' ability to operationalize multi-cloud, cited by 25% of respondents. In related results, the lack of necessary staff/skills was the second-most commonly cited internal security threat, just behind data privacy protection, and up from a fifth-place ranking in our 2022 survey. Low-maturity EMEA organizations, meanwhile, were even more likely to cite skills issues as an internal threat: 54% compared to 38% for high-maturity organizations.

#1

rank of security as a multi-cloud success factor in EMEA

More than 8 out of 10 (84%) of respondents in EMEA called security an important (28%) or very important (56%) 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 two-thirds of EMEA respondents.

 The macroeconomic environment has impacted the company in a variety of ways, including cuts in staff and budget investments, contract acquisitions, and upskill strategies. — *Director of Engineering, European healthcare organization*

67%


of EMEA companies say multi-cloud helps them attract, motivate, and retain talent

In addition, another 15% of EMEA respondents expect their multi-cloud strategy to help them with their talent issues in the next year. Importantly, 69% of highly mature organizations in EMEA gained staffing benefits from multi-cloud, compared to just 39% of low-maturity EMEA respondents.

90%

of respondents in EMEA are adopting, standardizing, or scaling platform teams

Among EMEA respondents, 19% are adopting, 37% standardizing, and 34% scaling their use of platform teams across the organization.

 [Platform teams] help keep us secure and scale and adapt to changes in the business.
— *Security Engineer at a European business services organization*

Thanks to platform teams we can prepare and unify cloud solutions in our company. We also can improve our security and time to market (and other factors) by re-using patterns and tools. — *Infrastructure Architect at a European financial services firm*

There are not enough platform specialists and there is not enough knowledge in the development teams, so the natural resolution is to have a small platform team that leads the way and supports developers in their efforts. — *Network operations engineer at a European utility*

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.