



Big Five in Overdrive

Are State and Local Networks Ready?

February 10, 2014

Underwritten by:



As state and local government organizations grapple with tight budgets, demanding constituents, growing data volumes, and cross-government coordination challenges, the **Big Five of IT** – data center consolidation, mobility, security, big data, and cloud computing – promise to improve agency performance, productivity, and service. **But are state and local networks ready?**

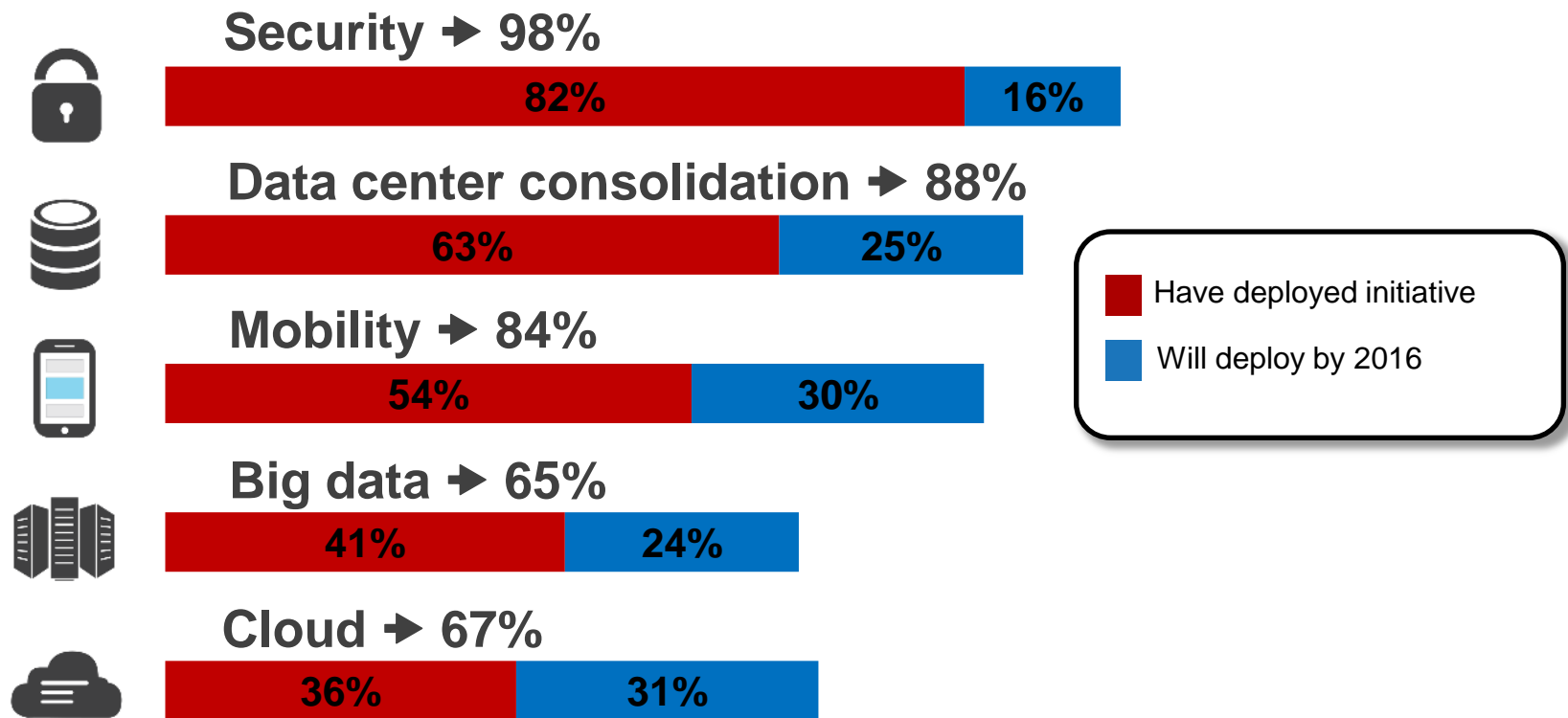
MeriTalk's The Net of Federal Networks study, released in September 2013, revealed that the **Big Five** will choke Federal networks if agencies don't take steps to prepare for increased network demands now. **Do state and local organizations face the same fate?**

MeriTalk surveyed 201 state and local IT professionals to find out. **The Big Five in Overdrive** report examines potential network impact, state and local readiness, and how organizations can prepare for the onslaught.



- Big Five, big opportunity:
 - The **Big Five** – data center consolidation (DCC), mobility, security, big data, and cloud computing – are headed for state and local agencies. The majority of state and local agencies will have deployed each of the Big Five by **2016**
- But bigger challenges lie ahead:
 - The vast majority of IT pros (**94%**) say their agency is not fully prepared for Big Five infrastructure requirements
 - If they fully deployed the Big Five today, **63%** of state and local IT pros say they would face **network bottleneck** risks and **89%** say they would need **additional network capacity** to maintain the same service levels
- What do state and local agencies need?:
 - The majority of respondents believe greater collaboration is key, but **just two out of five** agencies are actively coordinating efforts across the Big Five
 - IT pros want leadership support including prioritization from leadership (**54%**), regular coordination across all initiatives (**47%**), and standardized documentation of infrastructure requirements (**44%**)






- By **2016**, the majority of state and local agencies will have deployed each of the Big Five initiatives








Take Away: What Happens When the Rubber Meets the Road?

- **Security, cloud computing, and big data** are poised to have the most significant impact on network complexity and capacity

Greatest impact on *network complexity**

	Security	32%
	Cloud	25%
	Big data	24%
	DCC	23%
	Mobility	22%

Greatest impact on *network capacity**

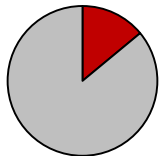
	Cloud	27%
	Big data	26%
	Security	18%
	DCC	18%
	Mobility	15%

Take Away: Are Networks Ready?

Are Agencies Prepared?

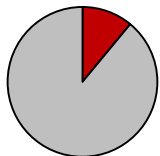
- The vast majority of respondents (**94%**) are not fully prepared* for the overall infrastructure requirements of the **Big Five**

Additionally, few say their specific network segments are fully prepared:**



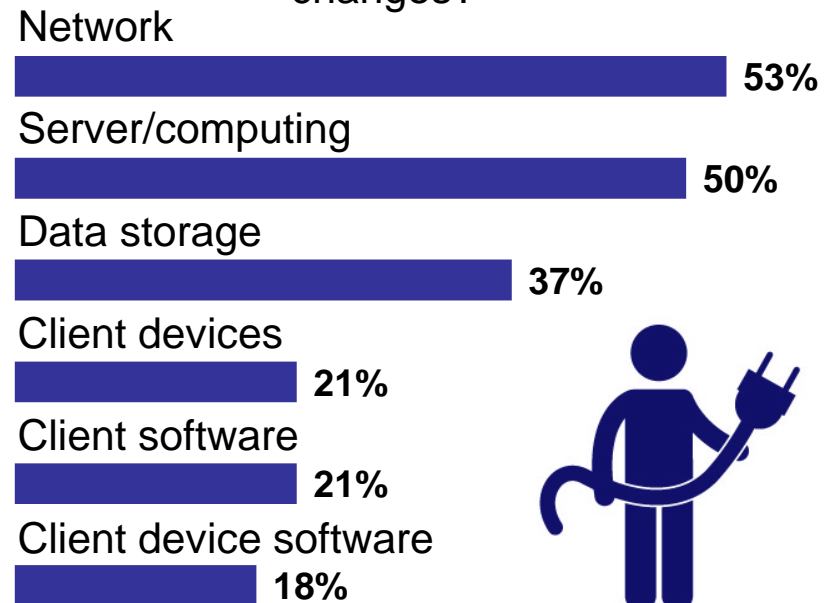
Just 14% say their data center networks are fully prepared

and



Just 12% say their enterprise campus networks are fully prepared

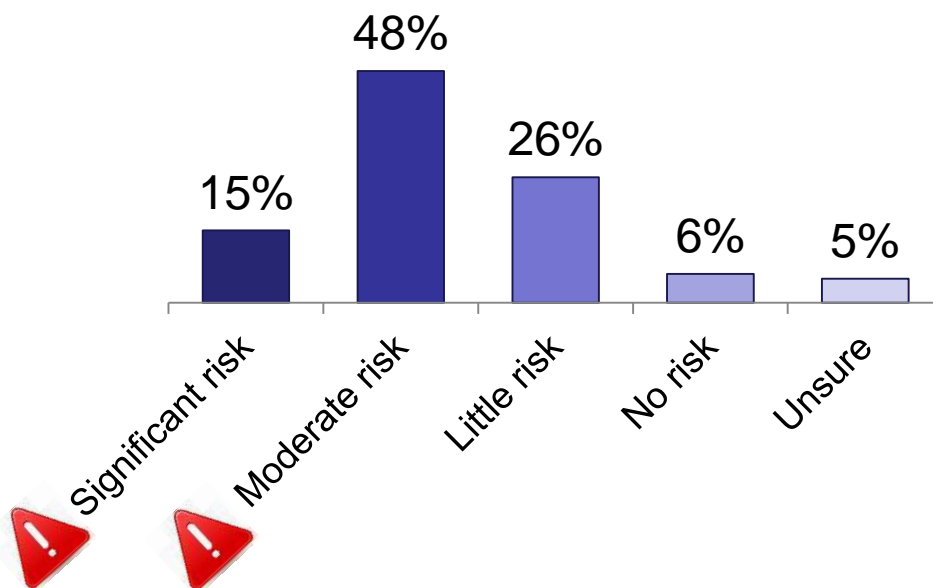
What components of your organization's IT infrastructure will require the most significant changes?***



Take Away: Big Five – Big Promise, Big Challenge

- More than half (**63%**) see moderate to significant risk for network bottleneck

If your organization were to fully deploy all of the Big Five today, how would you describe your risk for a **network bottleneck**?

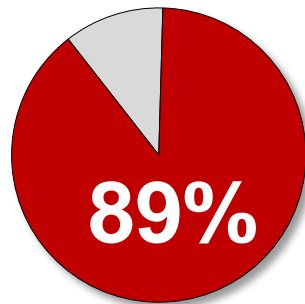


Take Away: Big Five Bottlenecks Can Hijack Networks

The Case for Capacity

- Nearly all respondents need additional network capacity to fully deploy the Big Five

If deployed today,



need additional network capacity to
maintain the same level of service

Average additional capacity
needed:

36%



Take Away: Capacity is the Elephant in the Room

- IT pros foresee challenges with **security, bandwidth, and storage limitations** as a result of the **Big Five**

Which of the following network challenges do you believe your organization faces as a result of the Big Five?*



Take Away: What's Keeping Network Managers up at Night

- Long-term planning and standardization are critical to success

If you could address your agency's senior leaders, what would you tell them about the importance of preparing your networks for the Big Five?*

"Make **standardized procedures** for the whole organization instead of individual procedures for every installation"

"**Prioritize needs** against available resources"



"We need **a clear plan** that is disseminated to everyone"

"**Do it now** because in six months it will be too late"

"It is **essential to have the network backbone** to support the big five as technology evolves"

Take Away: Act Now or be Left in the Big Five Dust

- The majority (**79%**) of network managers believe preparing for the Big Five will be **easier or the same** for state and local agencies than for Federal agencies

How much of your agency's IT infrastructure will need to change by **2015** as a result of the Big Five?

Federal agencies: **45%**

State and local agencies: **23%**

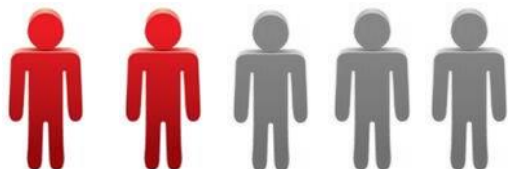
In addition, more state and local agencies have **already** taken key steps to prepare for the Big Five

Steps Taken*	S&L	Federal
Improve security measures	45%	43%
Add bandwidth	28%	24%
Improve network policies	34%	27%
Reduce network latency	29%	23%
Improve scalability	29%	24%

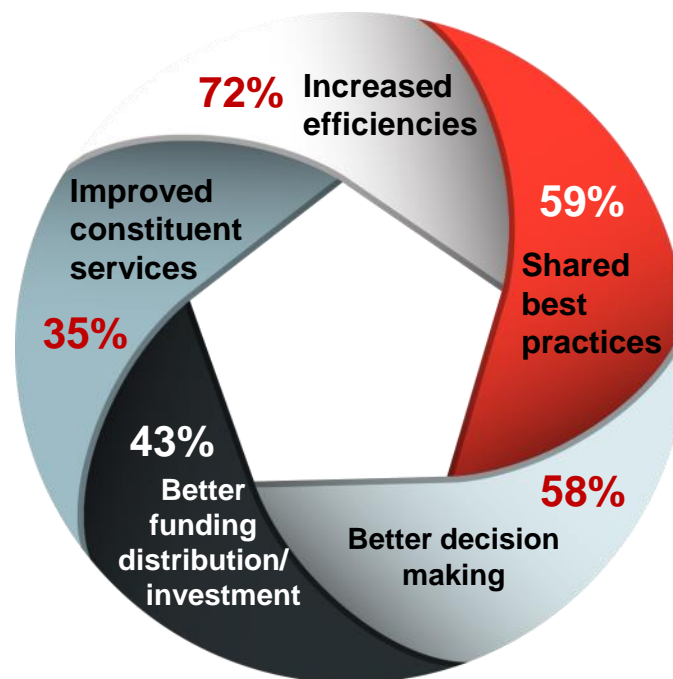
Take Away: How Will State and Local Lead the Way?

- The majority (**60%**) of respondents believe that greater coordination across the Big Five would be beneficial to ensuring adequate IT infrastructure

And Yet,
just **two out of five** state and
local agencies are actively
coordinating efforts across all
of the Big Five



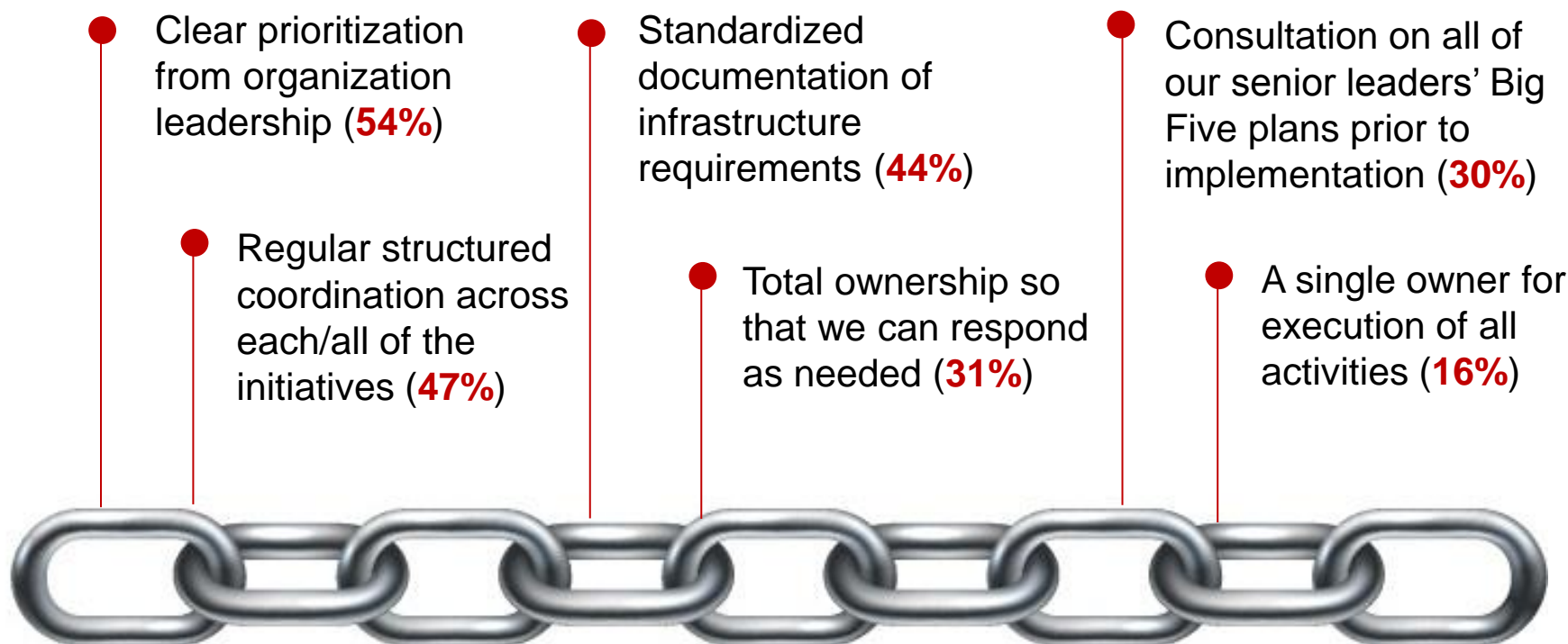
Benefits of Coordination Include:*



Take Away: Five Initiatives, One Network, Coordination is Vital

- More than half of respondents (**52%**) believe their organization's senior leaders do not understand the combined impact of the Big Five on IT

What do IT pros need from senior leaders?*



Take Away: Leadership Must be the Strongest Link

Light at the End of the Tunnel

- Despite challenges, IT pros predict brighter days ahead for the **Big Five**



“It is increasing workload right now, but will help in the future”



“It [will] improve our workflow and ability to better serve our audience in a safe and efficient way”



“Increased optimization of processes [will provide] better service to end users”



“It’s going to be an improvement; more cost effective as well as enabling better customer service”



Take Away: Outlook Good if Networks Improve

- **Don't Delay:** Most agencies are planning to deploy all of the Big Five over the next three years. Meanwhile, data volume and IT complexity continues to grow. Capacity planning must start today
- **Secure Buy-in:** Leadership support is critical to success. Evaluate infrastructure needs and make a clear business case
- **Coordination is Key:** Look for opportunities to eliminate organizational siloes. Big Five initiative leads should meet regularly, identify opportunities for shared time and cost savings, standardize processes, and maintain clear communication with senior leadership
- **Listen and Learn:** You're not alone – other agencies are charting the same territory. State and local organizations should regularly dialogue with their peers and work closely with trusted industry partners to leverage best practices



- MeriTalk, on behalf of Brocade, conducted an online survey of **201 State and Local IT Professionals** in December 2013. The report has a margin of error of ± 6.88 at a 95% confidence level

Job title:	
6%	Chief/Deputy Chief Information Officer or Technology Officer
4%	Acting/Assisting/Associate Chief Information Officer
7%	Network Director/Manager
5%	Network Administrator
2%	Network Architect
6%	Network Specialist or Engineer
20%	Information Technology (IT) Director/Manager
2%	Data Center Director/Manager
48%	IT Professional

Agency type:	
53%	State government
17%	County government
22%	City government
8%	Other local government

100% of respondents are familiar with their agency's networking infrastructure

Thank You

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