



# BUILDING A STRESS-TESTED PUBLIC SECTOR

UK SUMMARY | 2020

Without question, 2020 has been a year full of the unexpected, fueled by the COVID-19 outbreak. As the disruption spread and public sector bodies both fought the pandemic and managed its socioeconomic consequences, healthcare systems became stretched, education systems were halted and local government organisations across Europe bowed under the strain of unprecedented demand for services and support.

Combined, the pressure from escalating demand, rapidly changing delivery models, buckling supply chains and external security threats put IT leaders and their technology environments under inordinate stress. In tandem, organisational leaders looked to IT to help solve the capacity and innovation challenges they faced, but exactly how did they fair digital transformation?

Research conducted in Spring 2020 across Europe, including the UK, Germany, France, Spain, Italy, Switzerland and the Netherlands for Pure Storage by Insight Avenue asked 511 IT leaders about their current pain points and the lessons learned. What is particularly revelatory is the importance that data and infrastructure appear to be playing.

UK Government departments admit they were unprepared for a crisis like COVID-19. The biggest challenges for the UK have been around demands on remote access infrastructure with continued remote working and investment in technology and cloud services to effectively support this. UK departments have suffered more with IT performance issues during the pandemic than other countries. Overall, they are focused on efficiency, managing security threats and empowering employees, but are held back by legacy infrastructure which is increasing operational costs and reducing efficiency.

They acknowledge that the impact of COVID-19 has accelerated the need for their department to overhaul its data infrastructure and recognise they need to be more creative in how they use tech, drawing on agile methodologies and design thinking more than other countries. Overall, they see the need for an ongoing focus on resilience and to better understand which applications are critical and where to put workloads and longer term also expect value for money to be redefined and Government technology estates to be re-evaluated to ensure the UK is better equipped to deal with crisis and change.

## COVID-19: The Ultimate Stress-Test?

- **94%** of UK IT leaders say they were not extremely prepared for a crisis like COVID-19 (**92%** across all countries). **77%** say COVID-19 has been a stressful experience for them in their technology role.
- The biggest challenges for IT departments in UK Central Government have been demands on remote access infrastructure (**90%**) and performance issues or degraded IT experience (**89%** - the highest of all countries), followed by disruption to on-premise applications and workloads (**84%**).
- In the last six months, in the UK an average of **38%** of digital transformation activities were accelerated whilst an average of **26%** of activities were delayed or cancelled. Priorities for digital transformation activities in the next 12 months include efficiency and speed of delivery (**97%**), managing security threats (**95%**) and empowering employees with digital skills and technologies (**95%**).

## Service Delivery Imperatives

- **83%** say improving the citizen experience is important in building trust in Government. The most important citizen outcomes in how tech investment is prioritised and how online services are delivered are that it is offers reliable access (**54%** – higher than all other countries) and is highly functional (**52%**).
- **60%** say they find it difficult to measure the impact of tech investment in terms of impact on citizen outcomes.
- The most significant barriers to digitising citizen services and automating processes at this time are investment in data infrastructure (**37%**), lack of digital skills and experience (**32%**) and culture/resistance to change (**32%**). **52%** cite budgetary constraints as a key reason why technology projects are not delivering maximum value.
- The main ways departments could be using data better are to improve citizen outcomes (**50%**), to get more value from limited budgets (**48%**) and to inform real-time decision making (**45%**).

## Data Infrastructure Concerns

- **67%** say legacy infrastructure is holding up digital transformation progress. Current data infrastructure is compromising department performance resulting in increased operational costs (**87%**), reduced efficiency (**84%**) and reduced operational agility (**83%**).
- **83%** say the impact of COVID-19 has accelerated the need for their department to overhaul its data infrastructure (**83%** for all countries).
- Since the start of the COVID-19 pandemic, **28%** have seen an increase in malicious data security threats lower than the **40%** average. **30%** report an increase in non-malicious data security threats (**24%** average). Confidence in managing threats is impacted by the increase in remote working and network access points or vulnerabilities (**49%**) along with legacy infrastructure and outdated operating systems (**36%**) and a changing threat landscape from hackers (**33%**).
- **66%** say investment in infrastructure security is not keeping up with security threats (against **59%** average) and **57%** say their department would sacrifice performance in tech to have enhanced security at this time.

## Moving Forwards: Agile Thinking and Tech Investment

- **86%** agree that now more than ever, they need to be creative in how they use tech so they can do more with less (highest – **71%** average).

- **78%** say that agile methodologies and design thinking are more important now than before the pandemic (highest – **66%** average).
- Priority areas for technology investment over the next two years are security/risk management (**77%**), remote access technology/mobility (**77%** – highest of all countries), cloud services (**74%** – highest of all countries).

## Moving Forwards: A Transformed Public Sector?

- The lessons that departments have gained from their experiences include the need for ongoing focus on resilience/to rethink continuity (**91%**), to better understand which applications are critical and where to best put workloads (**90%**) and to better manage employee expectations (**89%**).
- Longer term changes likely to endure following COVID-19 in Central Government include the continued use of collaborative technologies/remote working where possible (**94%**), value for money taking on new meaning in economic and societal recovery from COVID-19 (**90%**) and re-evaluation of Government “estate” with continued widespread remote working (**90%**).

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**We're working tirelessly with Public Sector organisations around the globe to help them use data in ways that transform not only their own operational efficiency, but that transform the lives of their employees and most importantly, the citizens they serve.**

To read the full report, please visit [purestorage.com/agilegov2020](https://purestorage.com/agilegov2020)

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