The Cloud Repatriation Shift

What the data tells us

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Introduction

The promise of the public cloud as the ultimate solution for scalability, agility, and innovation has driven widespread adoption across enterprises.
Yet, as organizations gain experience and their strategic priorities evolve, many are rethinking this approach.
The shift toward cloud repatriation—the process of moving workloads back from public clouds to on-premise or private environments—is no longer a niche trend but a significant movement reshaping IT infrastructure strategies.

The Cloud Repatriation Shift: What the Data Tells Us offers an in-depth look at this emerging phenomenon, drawing on global market research conducted in partnership with Foundry, an IDG Inc. company. This guide explores the key drivers behind repatriation, the challenges organizations encounter, the types of workloads involved, and the measurable benefits achieved. Whether you're just beginning to explore repatriation or seeking to refine your strategy, this data-driven guide provides actionable insights to inform your decisions in 2025 and beyond.

Method and objectives

This research explores the growing trend of cloud repatriation—the process of migrating workloads from public cloud infrastructure to on-premises, private cloud or edge infrastructure environments. In this survey, we aim to understand repatriation trends, key drivers, targeted workloads, and perceived benefits or challenges.

Additionally, the survey examines the financial, security, and operational impacts of repatriation, as well as future cloud repatriation plans.

Total respondents	201 qualified respondents
Collection Method	Online questionnaire
Geography	U.S., Europe, Asia-Pacific
Field dates	March 2025
Number of questions	20
Company size (revenue)	$500M or more

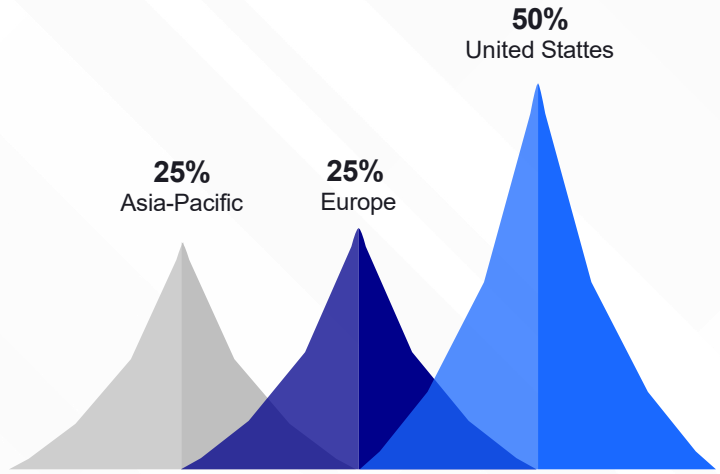
Senior decision-makers

Qualified respondents are employed in management roles in IT/Technology and/or IT Security with knowledge of cloud strategy.

Additionally, qualified organizations have repatriated and/or have plans to repatriate public cloud workloads.

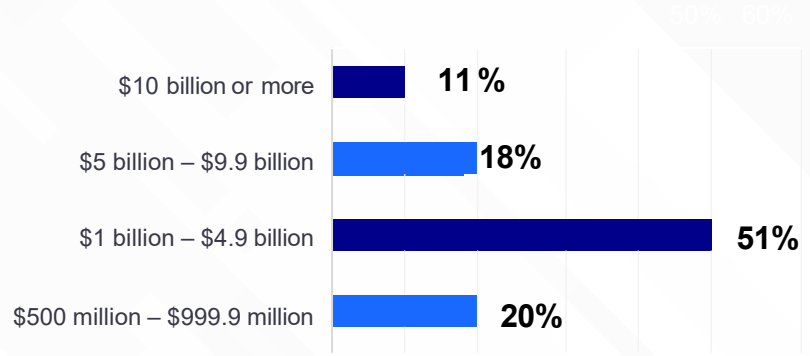
Respondent profile

Region

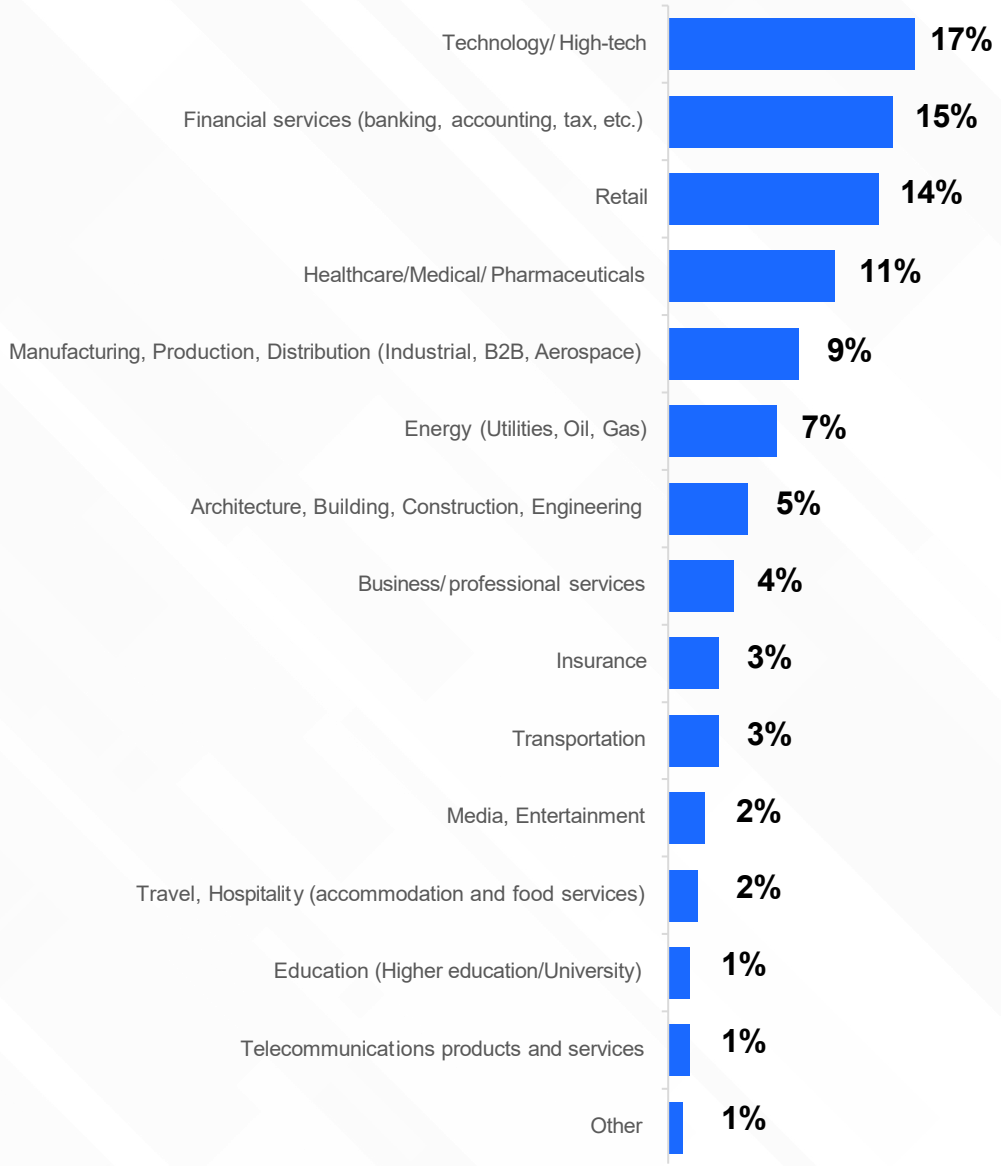


Annual revenue

mean: $3.8 billion



Primary industry



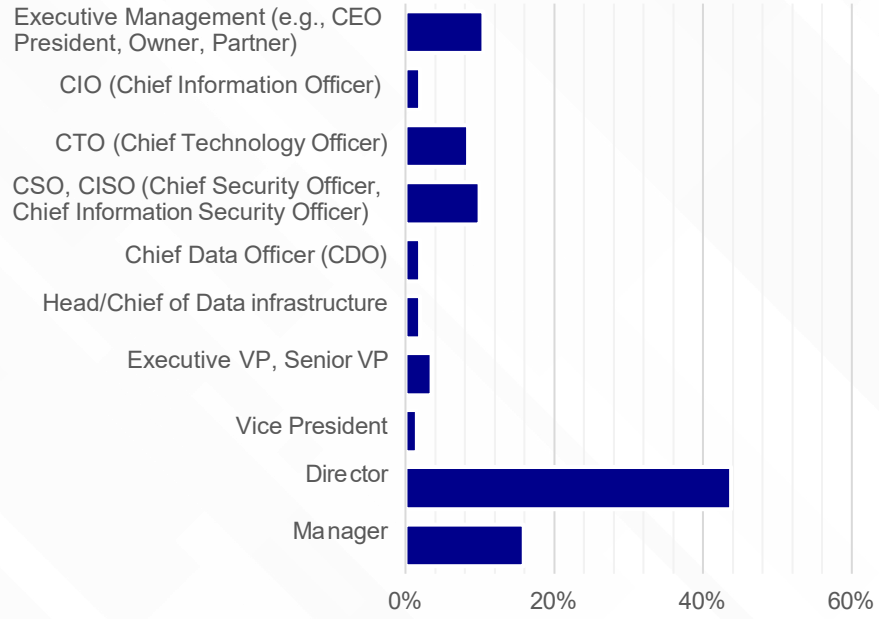
Job role

11%
Executive management (e.g., CEO, President, Owner, Partner)

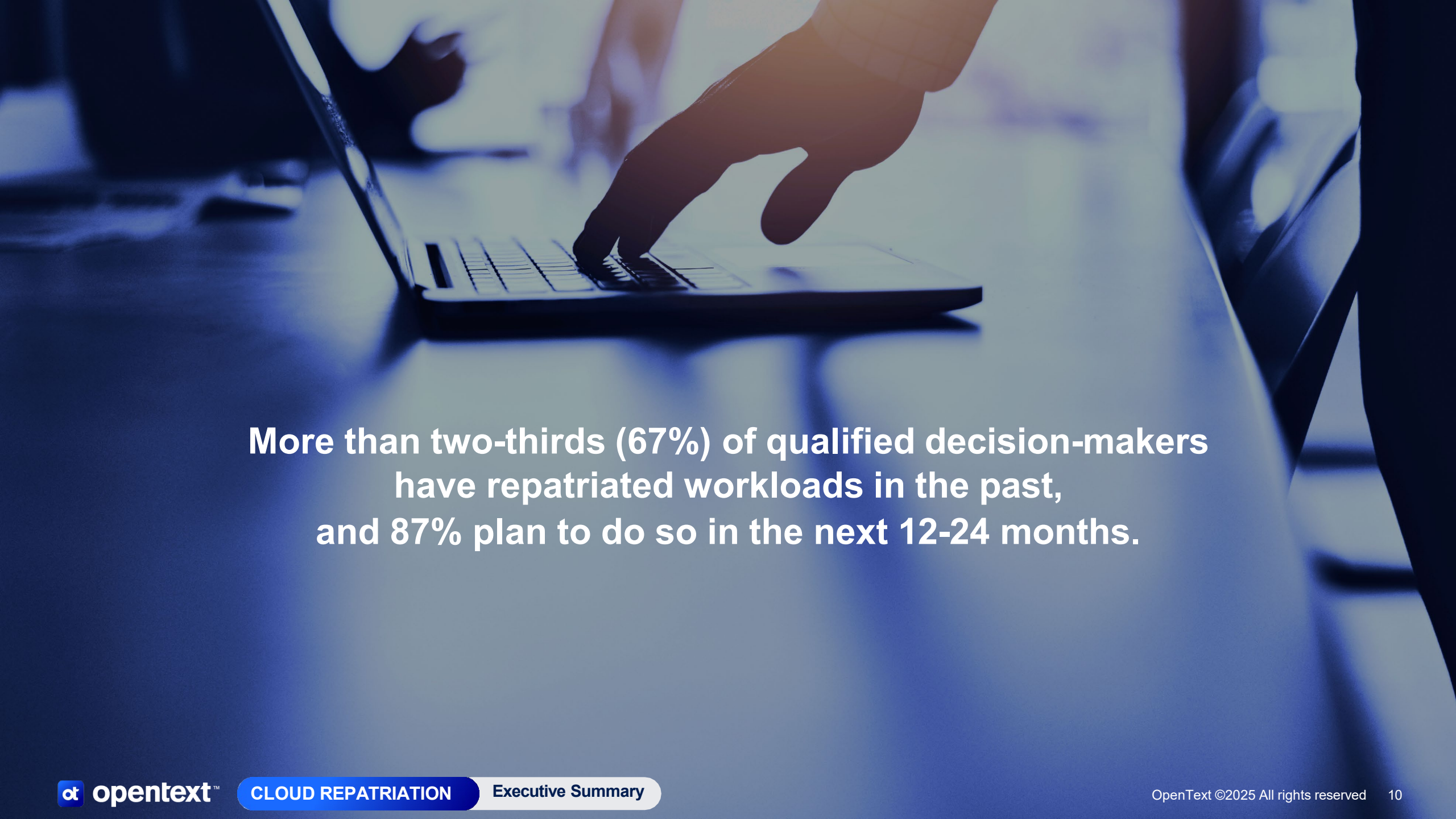
50%
IT/Technology management

39%
IT Security/Cybersecurity management

Job title



Executive summary



More than two-thirds (67%) of qualified decision-makers have repatriated workloads in the past, and 87% plan to do so in the next 12-24 months.

Summary of findings

A majority of organizations **(63%)** are employing a hybrid strategy today, with a smaller share primarily leveraging only private **(21%)** or public cloud **(16%).**

Cloud repatriation is accelerating

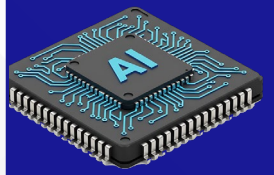
- More than two-thirds **(67%)** of qualified decision-makers have repatriated workloads in the past, and **87%** plan to do so in the next 12-24 months.
- Fourteen percent of qualified organizations **(14%)** have fully exited public cloud environments, and 18% plan to fully repatriate all public cloud workloads over the next 2 years.
- Workloads are being repatriated across a mix of environments, with an average of **28%** of workloads moving to private cloud, **28%** to hybrid cloud, **25%** to on-premises data centers, and **19%** to edge infrastructure.

Top drivers of cloud repatriation

- Data security concerns **(51%)** lead the motivations for repatriation.
- Cost control **(39%),** customization needs **(35%),** and business continuity **(34%)** are also major considerations.

Workloads targeted for repatriation

- Organizations with repatriation plans aim to move **39%** of their public cloud workloads, on average.
- AI/ML workloads **(57%)** are the top priority for repatriation over the next 12-24 months, followed by collaboration and communication solutions **(51%),** core business applications **(47%)**, and SQL/NoSQL databases **(40%).**



AI/MI are the top priority for repatriation

Database repatriation trends

- Two-thirds **(66%)** have already repatriated any type of database workload, and **83%** plan to do so within the next 12-24 months.
- AI/ML-intensive databases **(59%)** and hybrid cloud-integrated databases **(53%)** are perceived as best suited for repatriation.

Summary of findings (continued)

Challenges and considerations

- Business continuity concerns during migration **(75%)** and high up-front costs of on-premises infrastructure **(61%)** are the most significant barriers to public cloud repatriation.
- Migration complexity **(50%)** and integration challenges **(48%)** also pose concerns.

Security and compliance gains

- The top reported benefits among those who have repatriated workloads include greater security and compliance **(61%)**, improved performance **(53%),** and better data governance **(52%).**
- A large majority **(92%)** of organizations that have repatriated workloads report an improved overall security posture.
- Enhanced visibility **(62%)** and improved data privacy **(60%)** are viewed as key security benefits of repatriation.

92% Report improved security posture

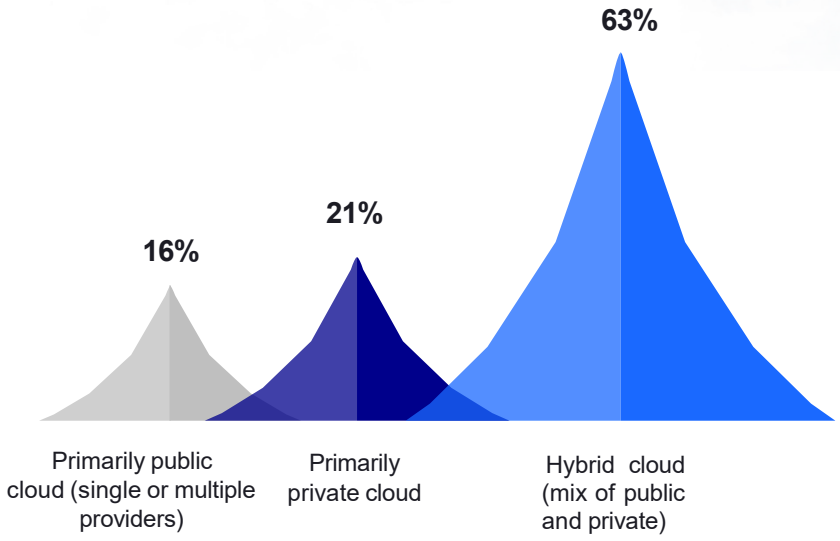
Cost impact of repatriation

- Four in ten **(41%)** of organizations report a decrease in overall costs post-repatriation, while **35%** see no change, and **23%** report increased costs.
- Infrastructure **(66%)** and security **(65%)** are seen as the top areas for potential cost savings.
- Organizations that have repatriated workloads report an average cost savings of **31%** across these workloads.

Results

Reevaluating the cloud:
strategic approaches in 2025

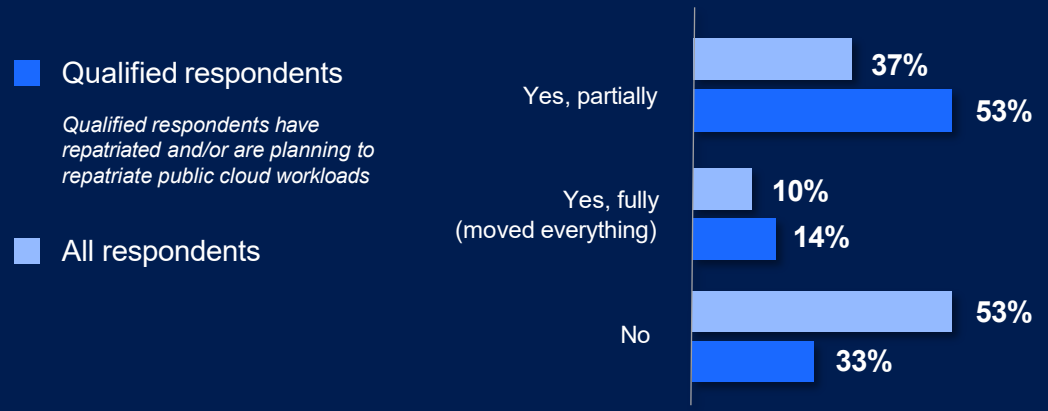
63% Most organizations today rely on a **hybrid cloud strategy**



Not just hype:
repatriation in action

67%* have repatriated workloads from a public cloud to an on-prem, private cloud or hybrid environment

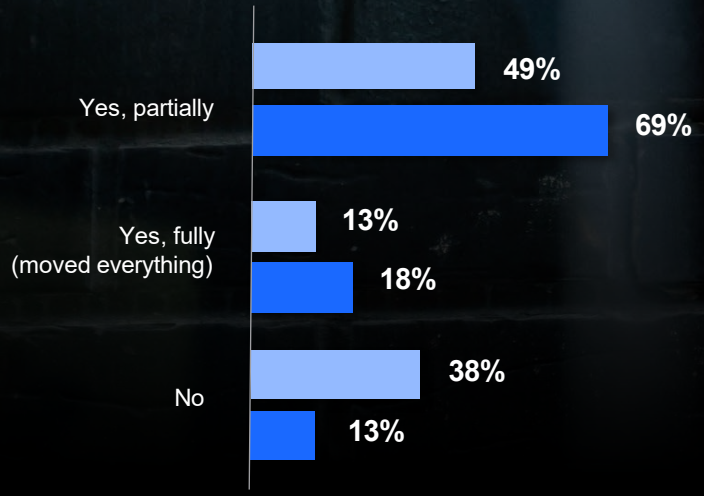
**qualified respondents*



Looking ahead:
repatriation plans over the next 2 years

87% **plan to repatriate workloads from a public cloud** to an on-prem or private cloud environment

**62% of all who were asked*



- Qualified respondents
  Qualified respondents have repatriated and/or are planning to repatriate public cloud workloads
- All respondents

Scope of planned repatriation over the next 24 months

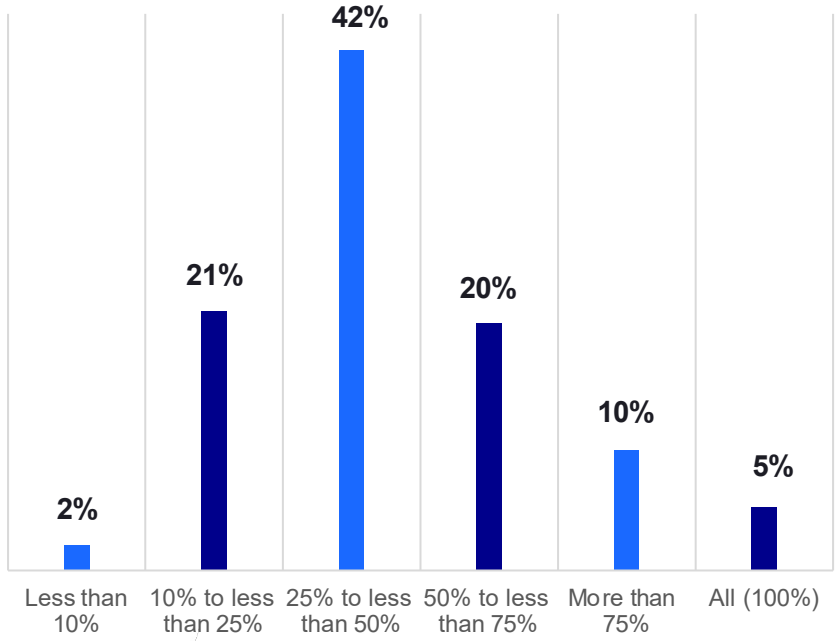
Base: Enterprises planning to repatriate public cloud workloads

Among organizations with repatriation plans,

39% of public cloud workloads are targeted for repatriation, on average

Average % of workloads targeted by region:

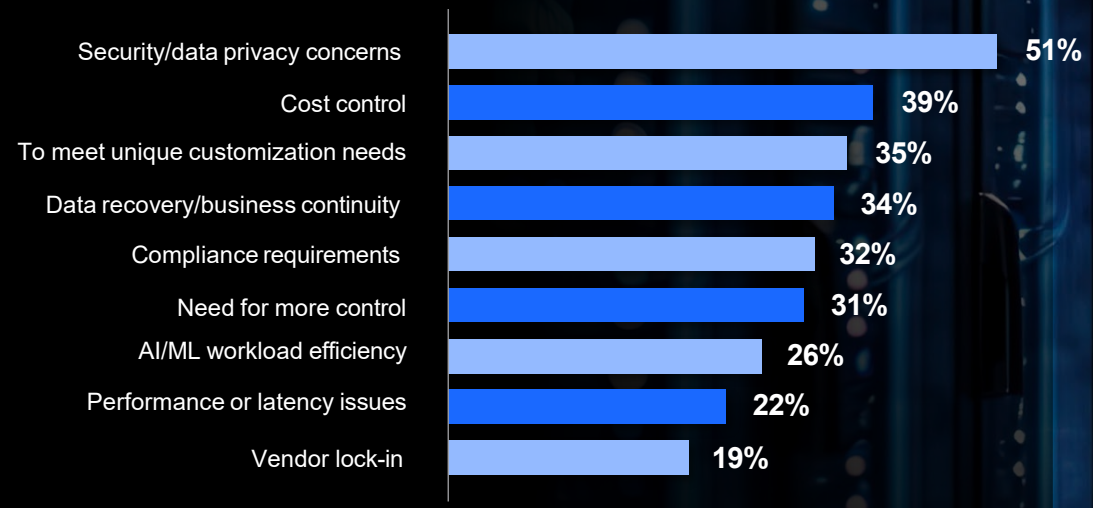
U.S.: **36%**
Europe: **35%**
Asia-Pacific: **47%**



Concern regarding data security/privacy (51%) is the top driver for repatriating public cloud workloads.

Key Drivers Behind Cloud Repatriation

51% **Consider data security/ privacy concerns as the top driver** for repatriating public cloud workloads



***Customization needs** are more likely to drive repatriation plans in **Asia-Pacific** (48% vs. 33% in Europe and 29% in the U.S.)*

Among those who have not yet repatriated workloads, concern regarding business continuity during migration is the biggest barrier to repatriation.

Understanding top barriers to cloud repatriation

Base: Enterprises who have not yet repatriated public cloud workloads

Challenges faced during cloud workload repatriation

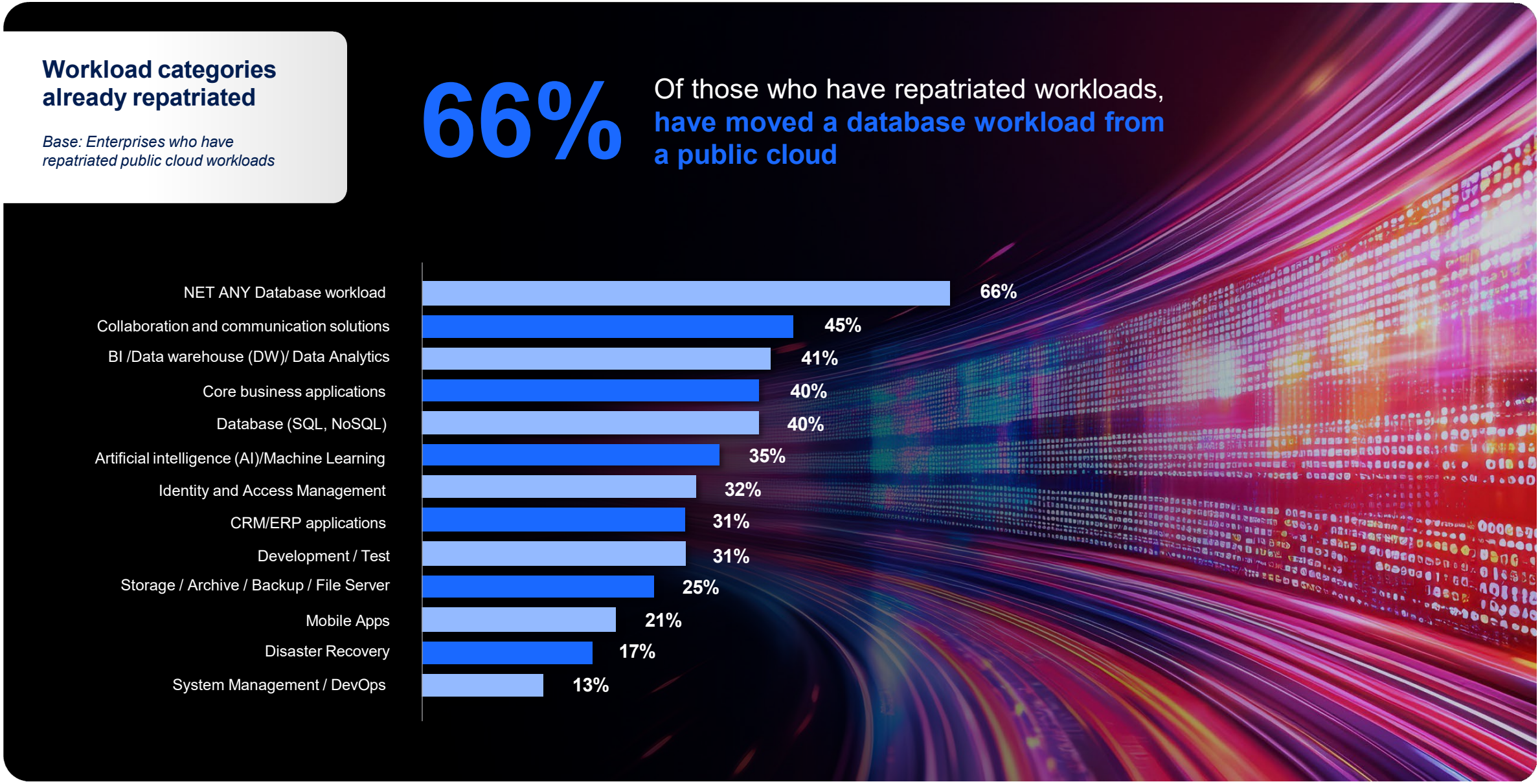
Decision-makers cite **ensuring security and compliance, integration and migration complexity as top considerations with repatriation**

Workload categories already repatriated

Base: Enterprises who have repatriated public cloud workloads

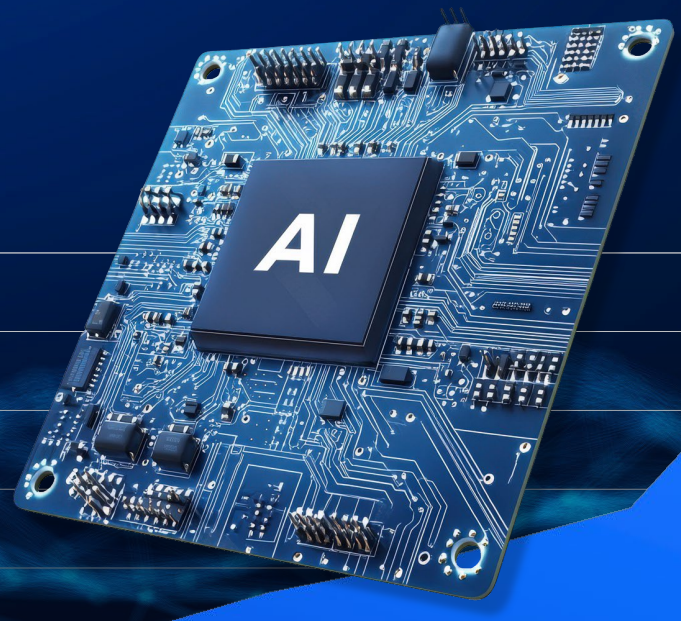
66%

Of those who have repatriated workloads, **have moved a database workload from a public cloud**



Workloads targeted for repatriation in the next 24 months

Base: Enterprises planning to repatriate public cloud workloads



AL/ML workloads are most often targeted for repatriation over the next 12-24 months

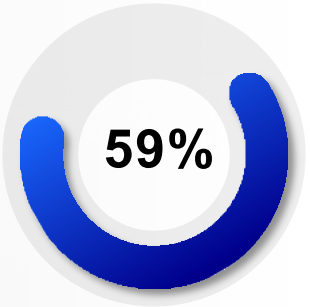
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%

System Management / DevOps
Disaster Recovery
Storage / Archive / Backup / File Server
Mobile Apps
Identity and Access Management
Development / Test
CRM/ERP applications
BI /Data warehouse (DW) / Data Analytics
Database (SQL, NoSQL)
Core business applications
Collaboration and communication solutions
Artificial Intelligence (AI) / Machine Learning
Database workload (NET)

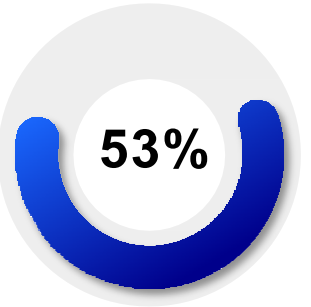
Rethinking the cloud fit for database workloads

AI/ML-intensive workloads, hybrid cloud-integrated databases, and long-term, high-volume storage are perceived as best-suited for repatriation

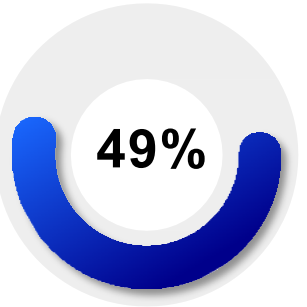
***Analytical workloads** are more likely to be considered well-suited for repatriation in the **U.S**. (58%) vs. Europe (41%) or Asia-Pacific (36%).*



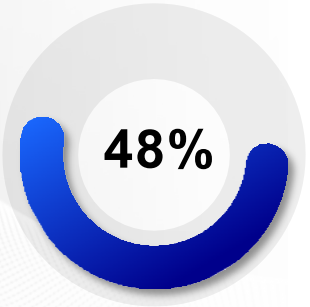
AL/ML-intensive workloads



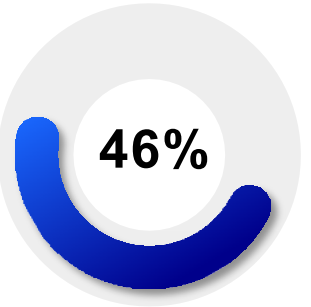
Hybrid cloud-integrated databases | Long-term, high-volume storage and archival workloads



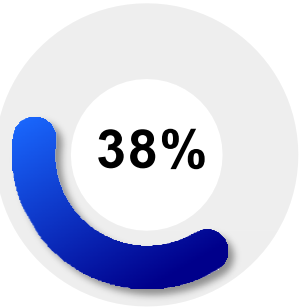
Analytics workloads (OLAP)



High-performance transactional databases (OLTP)

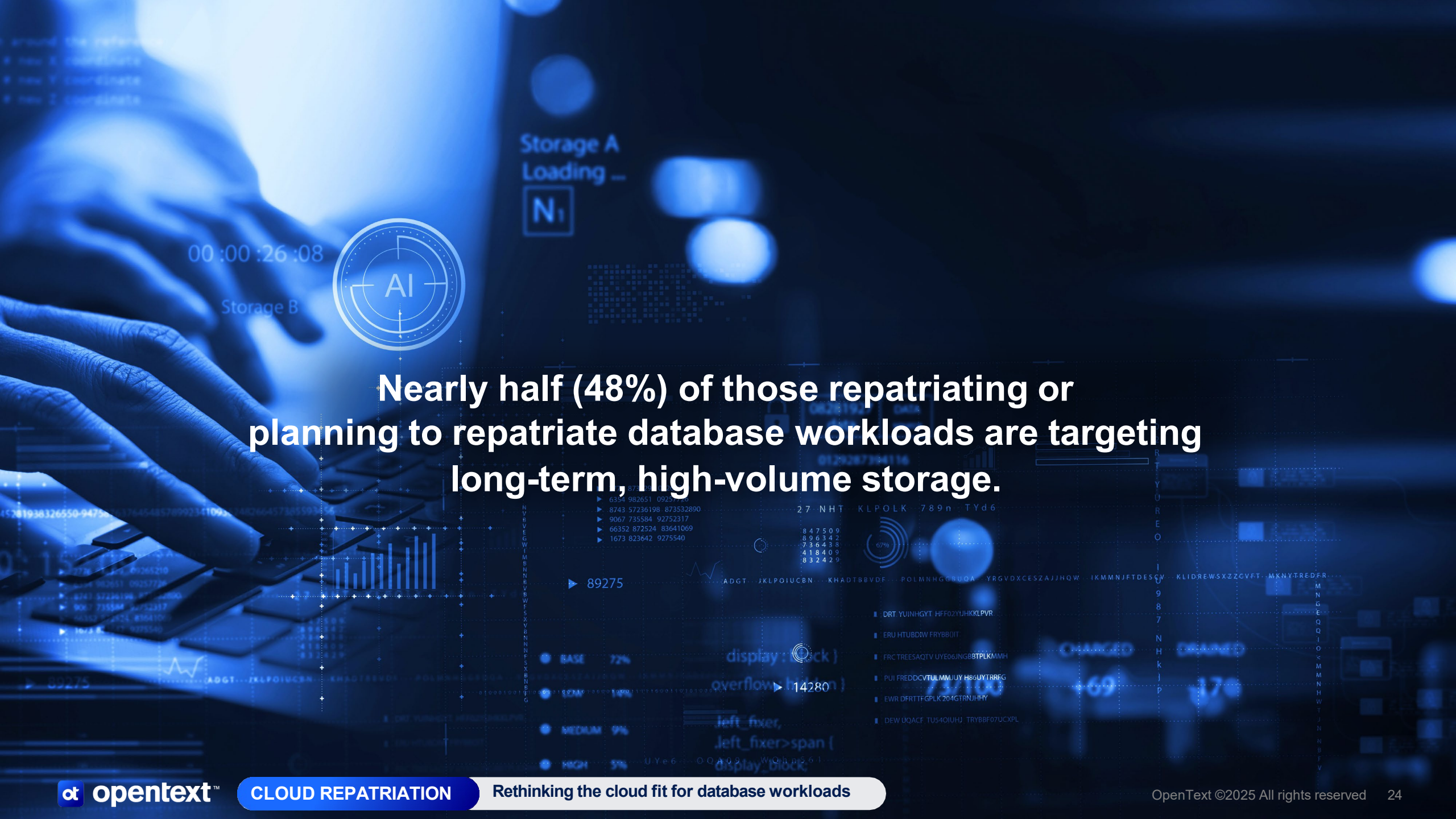


Regulated and compliance-heavy databases



Latency-sensitive or real-time databases

0% None of the above – I do not believe any database workloads are well-suited for repatriation



Nearly half (48%) of those repatriating or planning to repatriate database workloads are targeting long-term, high-volume storage.

High-impact database workloads organizations are bringing home

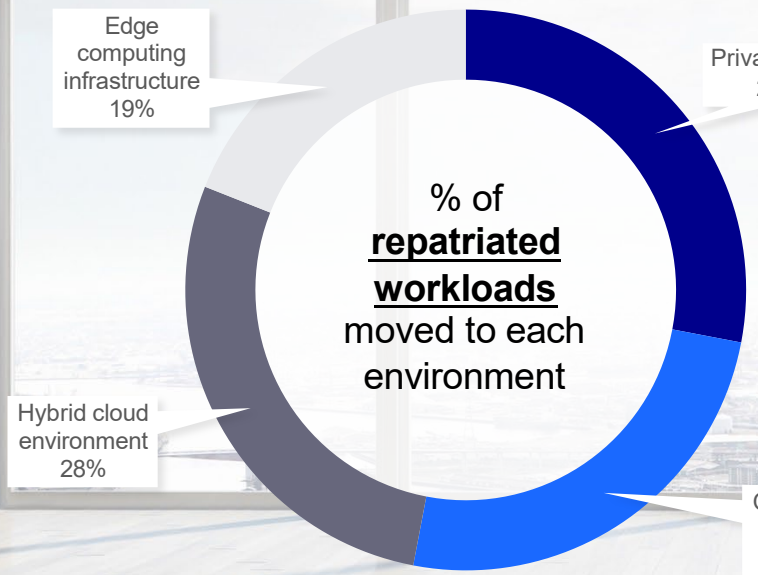
Nearly half **(48%)** of those repatriating or planning to repatriate database workloads are targeting long-term, high-volume storage

***Latency sensitive workloads** are more likely to be repatriated in **Asia-Pacific.** (51%) vs. Europe (24%) a nd the U.S. (31%).*

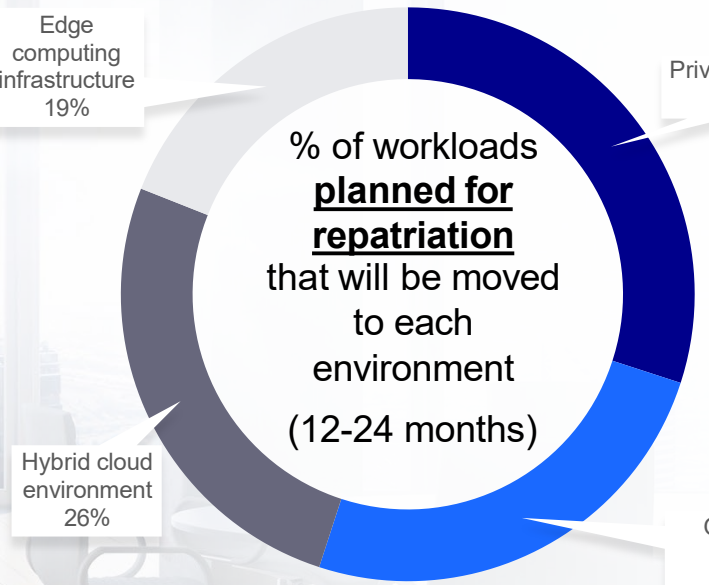
48% Long-term, high-volume storage and archival workloads	**41%** High-performance transactional databases (OLTP)
44% AI/ML-intensive workloads	**36%** Regulated and compliance-heavy databases
43% Analytical workloads (OLAP)	**34%** Latency-sensitive or real-time databases
42% cloud-integrated data Hybrid bases	**1%** Other

From cloud to where?
The new homes for repatriated workloads

Public cloud workloads are repatriated to a mix of environments (private cloud, hybrid cloud, on-prem, and edge infrastructure)



On premises:
U.S.:28%
Europe:22%
Asia-Pacific:23%



On premises:
U.S.:27%
Europe:23%
Asia-Pacific:23%

Beyond cost savings:
The value of moving workloads back from public cloud

Top benefits of public cloud repatriation include **greater security and compliance, improved performance, and better data governance**

61%
Greater security and compliance (e.g., meeting regulatory requirements more easily)

53%
Improved performance (e.g., lower latency, higher throughput)

52%
More control over data (e.g., reduced vendor lock-in, better governance)

47%
Better cost predictability (eg: avoiding variable cloud pricing)

45%
Cost savings (eg: lower operational or infrastructure costs)

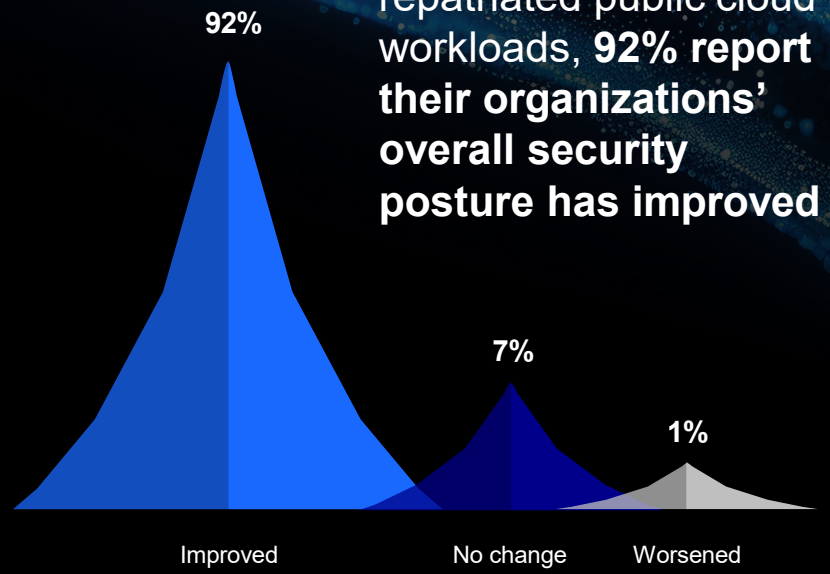
44%
Improved integration with on-prem or hybrid infrastructure

***Large enterprises ($5B in revenue or more)** are more likely to cite **improved performance** (69% compared to 47% among smaller enterprises) as well as **more control over data** (65% vs. 46%) as benefits.*

Among those who have repatriated public cloud workloads, 92% report their organizations' overall security posture has improved.

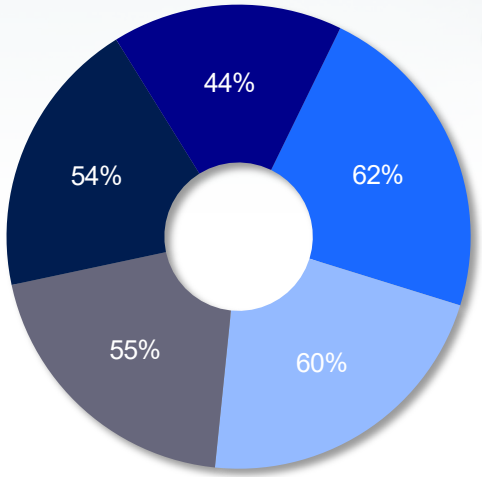
Security Outcomes Following Cloud Repatriation

Among those who have repatriated public cloud workloads, **92% report their organizations' overall security posture has improved**



Key Areas Where Repatriation Enhances Security Posture

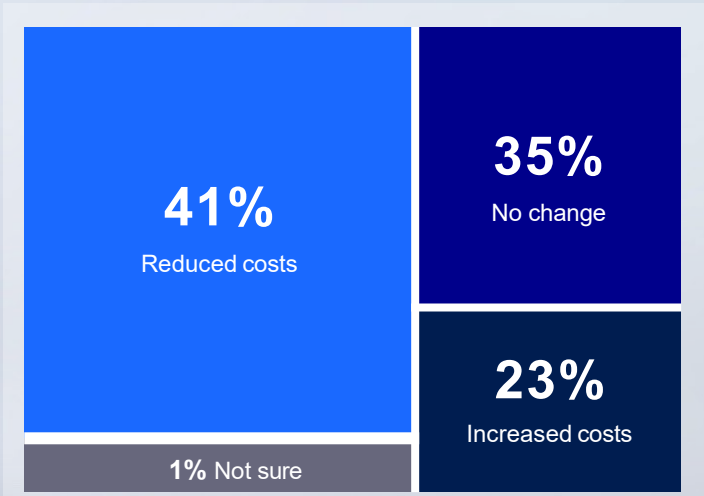
Decision-makers perceive enhanced visibility and improved data privacy as leading opportunities to improve security posture via repatriation



- Improved visibility into security posture
- Improved data privacy
- Improved ability to keep up with compliance mandates
- Protection from increasing cyber threats
- Elimination of confusion regarding shared responsibility for security

The Financial Payoff of Cloud Repatriation

Four in ten **(41%)** report their organizations have reduced costs overall since repatriating public cloud workloads



***VP and above titles** are more likely to cite **no change** in costs (51%) vs. Directors / Managers (28%).*

Maximizing ROI:
Key Cost Savings from Cloud Repatriation

Infrastructure **(66%)** and security investments **(65%)** are perceived as the top potential cost savings areas from repatriating public cloud workloads

*Decision-makers **outside of the U.S.** are more likely to perceive **licensing** as an area for potential cost savings (53% in Europe and 50% in Asia-Pacific compared to 31% in the U.S.)*

Where Repatriation Is Paying Off:
Cost Savings Revealed

More than half of those who have repatriated workloads report savings on security investments and/or cloud provider egress/data transfer

58% Security investments

58% Cloud provider egress and data transfer

50% Infrastructure

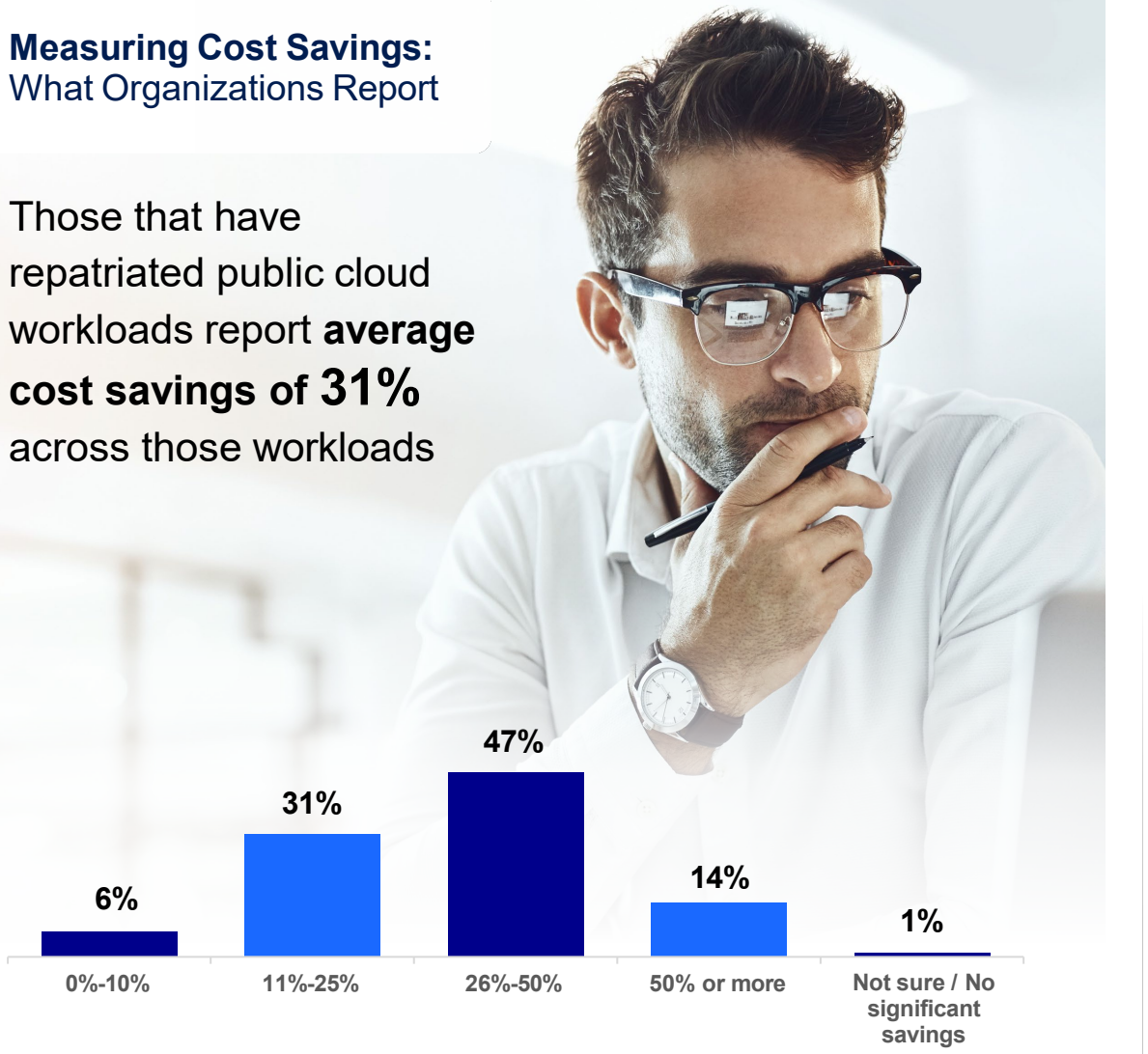
43% Staffing

41% Licensing

*In **Asia-Pacific,** decision-makers are more likely to have seen **savings on infrastructure** since repatriating (70% compared to 46% in the U.S. and 37% in Europe).*

Measuring Cost Savings:
What Organizations Report

Those that have repatriated public cloud workloads report **average cost savings of 31%** across those workloads



Charting your path forward: Embracing a balanced strategy for mission critical workloads

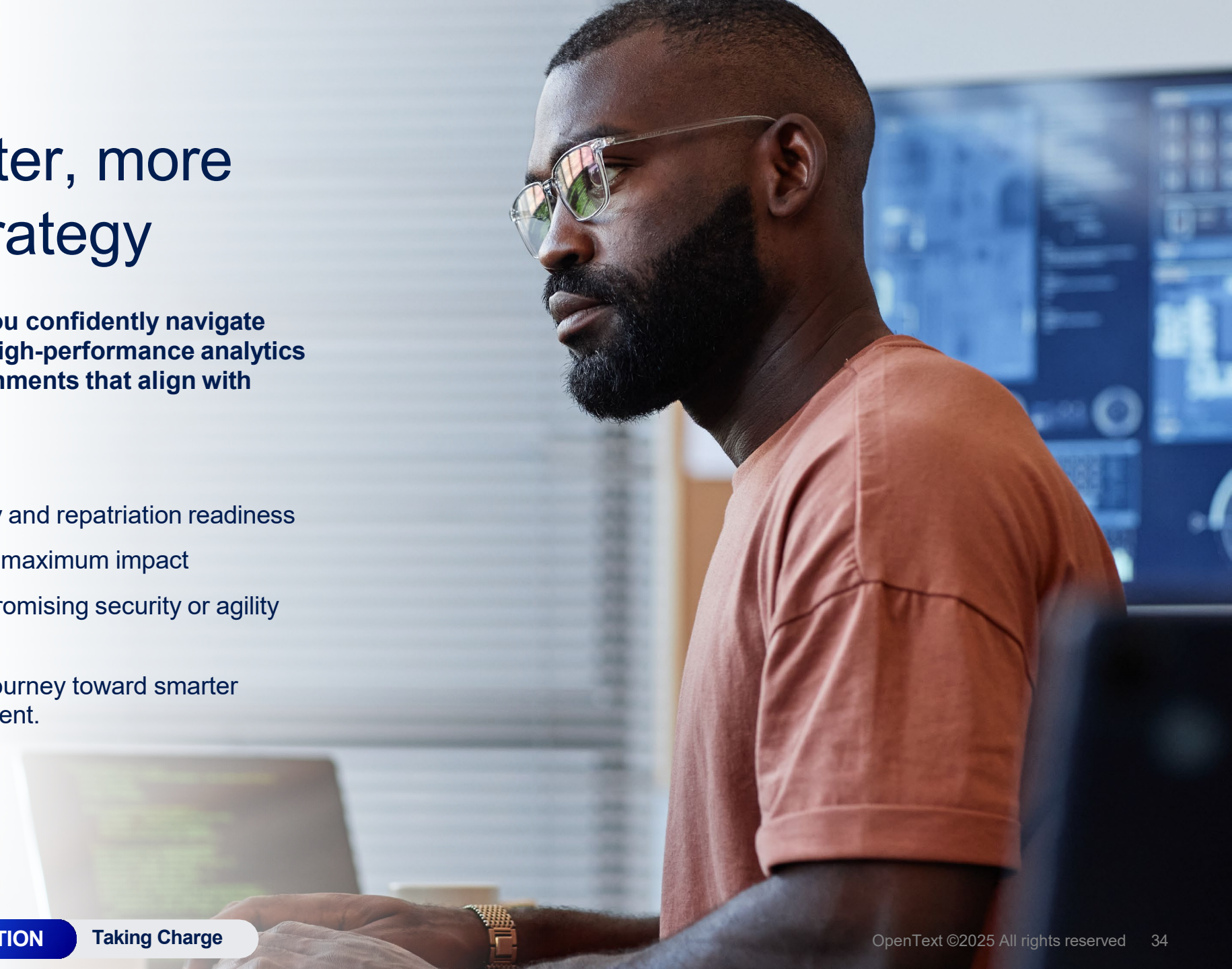
Cloud repatriation represents a pivotal shift in how enterprises manage their data and workloads—balancing the cloud's advantages with control, cost efficiency, and security demands. While the journey is not without challenges, the benefits are clear: improved performance, stronger security posture, significant cost savings and better governance.

As you consider your organization's infrastructure roadmap, keep in mind that repatriation is not about abandoning the cloud entirely but about finding the right mix of environments that best support your business goals. Use the insights shared here to assess where repatriation fits in your strategy, identify workloads ripe for migration, and plan for a secure, cost-effective infrastructure future.

The cloud landscape continues to evolve—being proactive today will position your organization for success tomorrow.

Repatriation is not about abandoning the public cloud entirely but about finding the right mix of environments that best support your business goals.

Taking charge: Building a smarter, more resilient data strategy



Discover how OpenText can help you confidently navigate cloud repatriation with its secure, high-performance analytics platform tailored for flexible environments that align with your organization's unique needs.

Connect with our experts today to:

- Assess your current cloud strategy and repatriation readiness
- Identify workloads to repatriate for maximum impact
- Unlock cost savings without compromising security or agility

Contact us to begin your journey toward smarter data management.

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