

Remote Worker Support, And Their Expectations for **Managed Services**

SECURITY FUSION -SD-WAN AND SASE

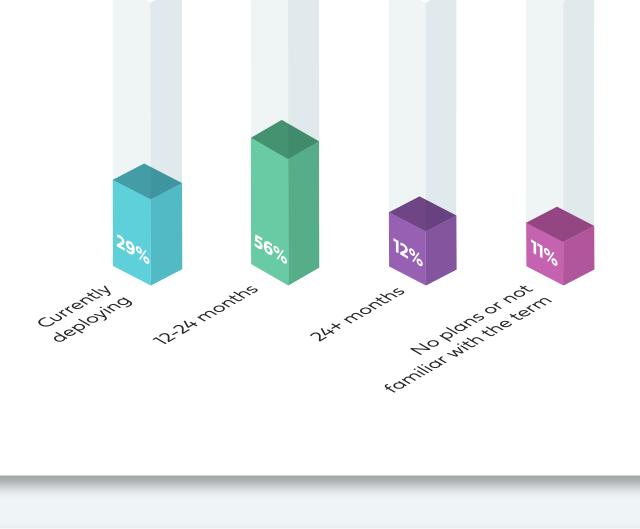
NETWORKING AND

Enterprises are increasingly fusing networking and security planning by adopting a SD-WAN and SASE architecture. One-third of surveyed enterprises state that they have already deployed SASE and most intend to leverage both their networking and security vendors.

SASE Momentum

security, has taken center stage for many in IT. Evaluating and selecting a WAN increasingly integrates security planning. Twenty-nine percent state that they are already deploying what they consider to be a SASE architecture, with another fifty-six percent planning to deploy within the next 12-24 months.

SASE, and the fusion of SD-WAN with

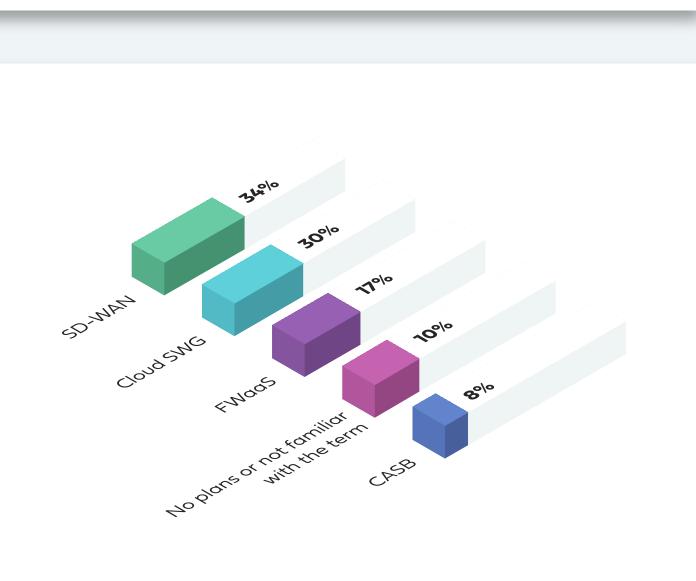


For SASE features, it isn't surprising that

Requested

SASE Capabilities

thirty-four percent identify SD-WAN connectivity as key, a SASE foundational feature and on-par with the different security capabilities required. Next is a cloud security gateway at thirty percent, followed by a managed firewall at seventeen percent



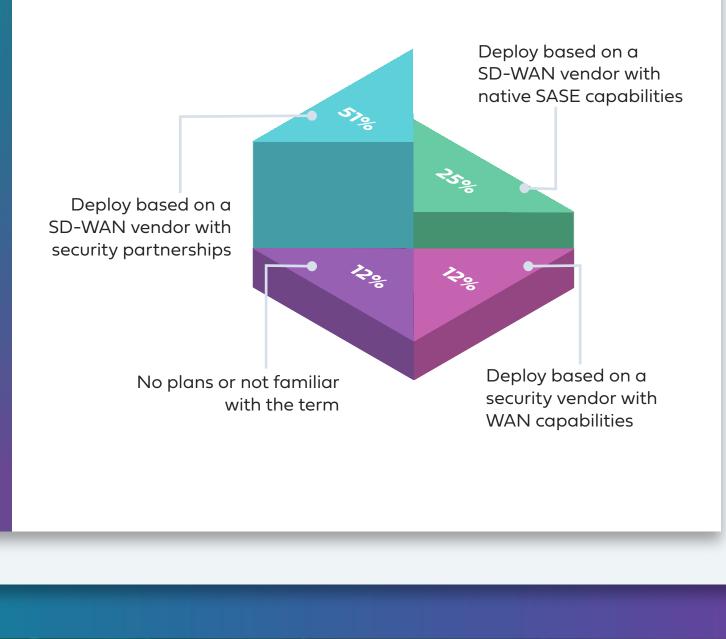
solution combining their WAN and security

SASE Deployment

Approaches

vendor, with only twenty-five percent preferring an all-in-one offer. Only twelve percent plan to rely on their security vendor to provide all WAN components.

Looking at SASE deployments, fifty-one percent plan to select a best-of-breed



The move to a permanent hybrid work environment impacts

flexibility. Over eighty percent expect more than a quarter of

Enablement of

long-term hybrid

employees to remain remote and almost two-thirds require

flexibility between on-premises and remote deployments.

planning and mandates on-premises and remote worker

Pandemic Impact on

Planning

THE HYBRID

WORKPLACE

overall purchasing plans, including increased support for the hybrid workplace forty-four percent, acceleration of digital transformation projects fifty-three percent, improvement of remote worker enablement thirty-eight percent and increased security for remote users thirty-six percent.

Post-Pandemic Remote

Over half (fifty-nine percent) of surveyed respondents expect twenty-five percent to fifty percent of their users to remain

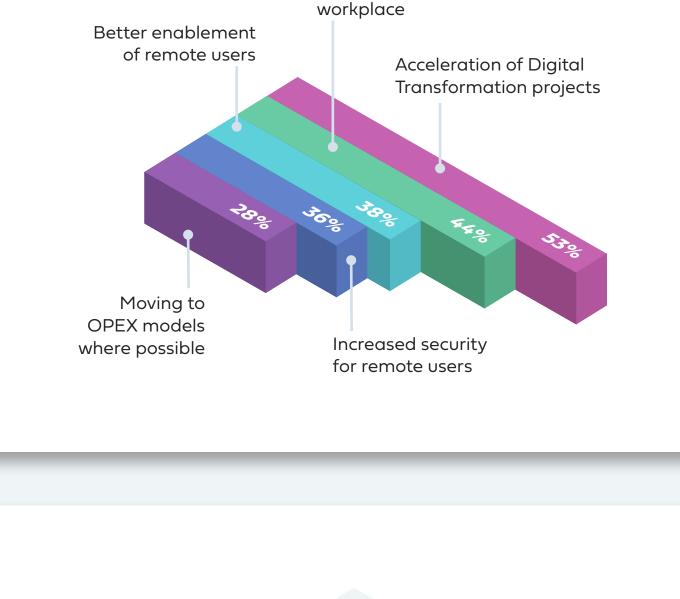
remote by the end of 2021, while twenty-one percent expect that more than fifty percent

of workers will remain remote through the end of the year. This is a massive shift to

Worker Plans

It goes without saying that 2020 threw us

all for a loop. Priorities shifted, influencing



the remote workplace and will influence investment for years to come.

Requirement For Hybrid Workplace Flexibility

The flexibility mandated by the hybrid

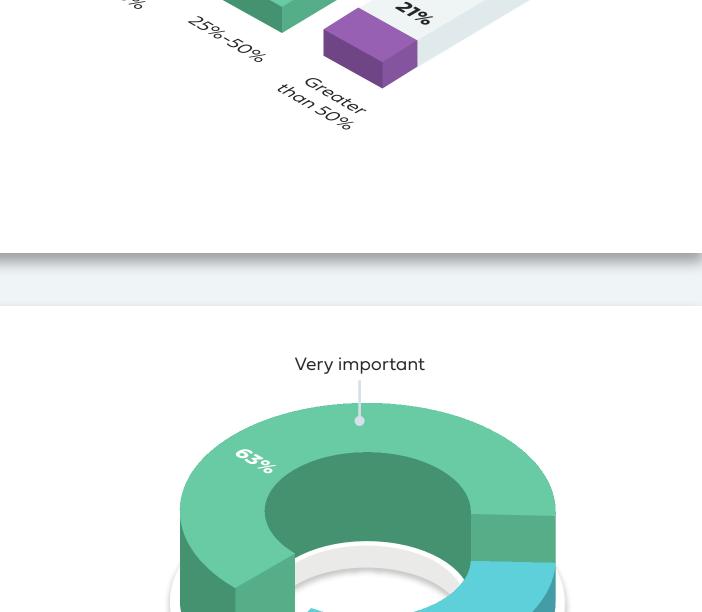
that the ability to quickly reallocate resources between on-premeises and

workplace is also reflected by sixty-three percent of surveyed respondents stating

remote is critical, and calls out for a solution that fuses on-premises and remote worker

orchestration, policy management, and

visibility. Silos won't suffice!

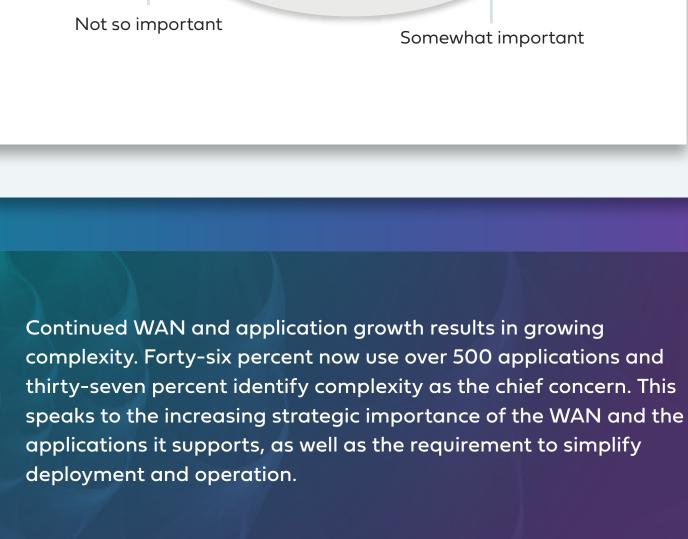


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WAN AND APPLICATION

GROWTH FUELS

COMPELXITY



2 - 20

101 - 500

21 - 50

50-100

Strategic reliance on the WAN continues to increase, with enterprises reporting over 100 inter-regional sites connected growing from nineteen percent in 2020 to twenty-eight percent in 2021.

Enterprises Reporting 100

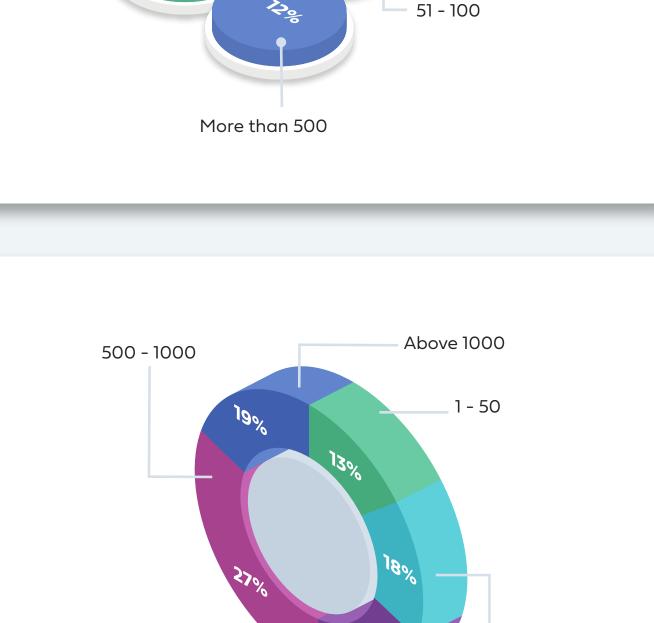
Or More Inter-Regional Sites

Reporting Over 500

Likewise, application diversity continues to increase, with those reporting use of over 500 increasing from twenty-three percent in 2019 to thirty-two percent in 2020 and now to forty-seven percent in 2021, a fifty

Applications In Use

percent gain in a year.



100 - 500

SaaS Application Adoption In parallel, SaaS adoption continues to gain

steam, with those reporting use of over 20 distinct applications growing from fourteen

percent in 2019 to twenty-four percent in

2020 and now to thirty-three percent in 2021.

growth from eleven percent, from twenty-five

UCaaS in particular experienced especially

strong uptake due to the pandemic. It is

percent in 2020 to thirty-six percent in

applications include Microsoft Teams,

platforms. Other up-and-coming

and officially adopted.

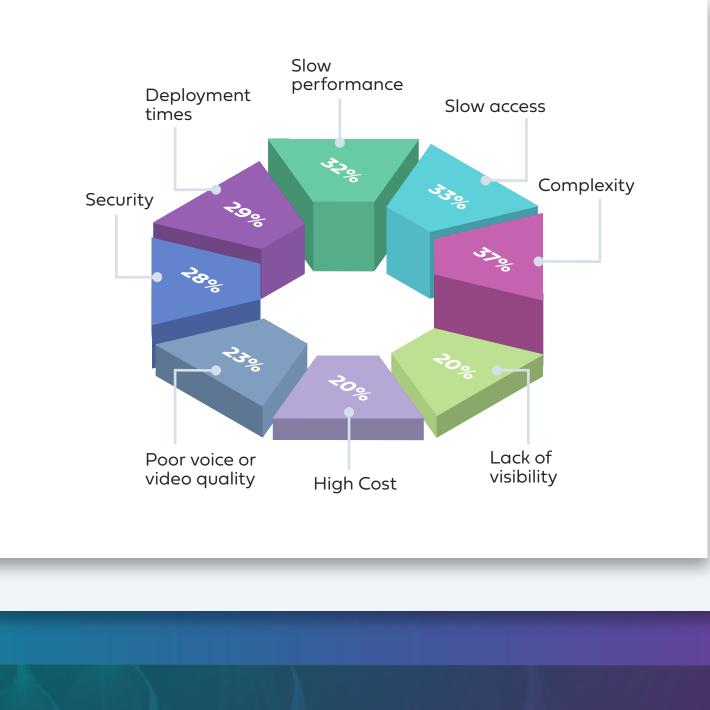
Top WAN Issues

no surprise that Zoom experienced major

2021, at the expense of other collaboration

SAP/HANA, and Slack. There are less issues with what were considered unsanctioned applications, as more become mainstream

With this growth comes challenges, including increasing complexity, still the #1 issue for IT, as evidenced by thirty-seven percent of respondents and on par with last year, followed by slow application access at thirty-three percent and performance at thirty-two percent. One area that stood out this year was cost, identified by twenty percent in 2021 vs sixteen percent in 2020, a twenty-five percent rise. This may be use to shrinking and/or shifting budgets in response to the pandemic, as well as increasing awareness of the need for cloud cost containment and MPLS contract costs.



Enterprises are showing more clarity in their requests while

Forty-three percent of respondents now identify application

performance as the key driver.

identifying less barriers to introduction for WAN transformation.

52%

11:

16%

36%

30%

21%

41%

33%

28%

DRIVERS AND BARRIERS

Drivers for WAN Transformation Why are enterprises looking at a WAN refresh and SD-WAN? Application performance is still #1 at forty-three percent, with an increase in cloud consumption or digital transformation

initiatives, both at thirty-eight percent.

thirty-nine percent looking to augment

MPLS also plays a major factor, with

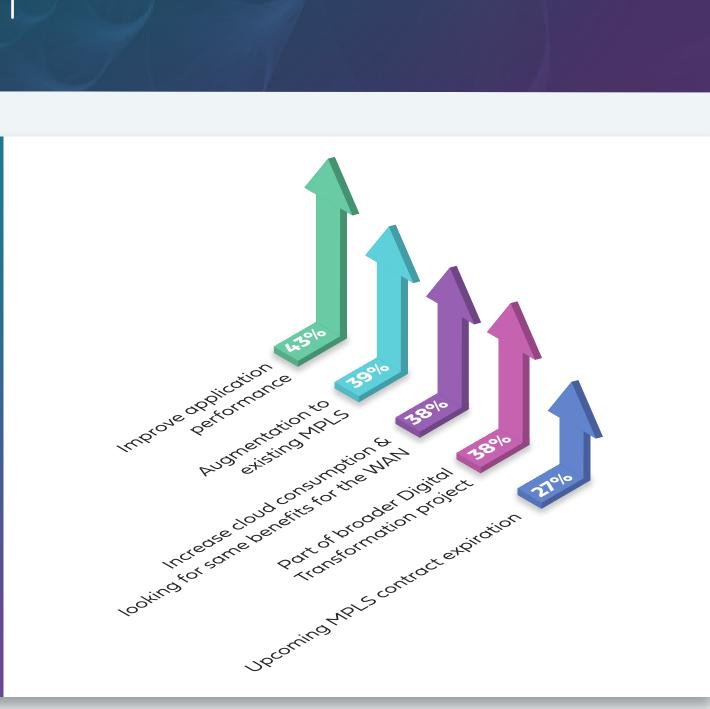
with other WAN options and another

twenty-seven percent planning for MPLS

their existing MPLS infrastructure

contract expiration.

WAN TRANSFORMATION



Application performance for

Lack of IT

No current plans

Transportation and Logistics

Healthcare

200

leadership focus

remote location considerations

Lack of knowledge

Technology 'newness'

in our 2020 report. This also speaks to the need for end-to-end performance SLAs. Lack of knowledge is still the second highest barrier at thirty-three percent, but down from forty percent in 2020 and thirty-one percent in 2019. Technology 'newness' is at thirty percent, down from thirty-four

percent in 2020 and thirty percent in 2019.

Also at thirty percent is lack of IT leadership

focus, but down from thirty-three percent in

2020 and up from sixteen percent in 2019.

Perceived Barriers to

WAN Transformation

less angst regarding application

performance gains, now at thirty-six

Identified barriers are dropping, including

percent as compared to forty-three percent

MANAGED SERVICES ACCEPTANCE AND REQUESTS

Managed Services Plans

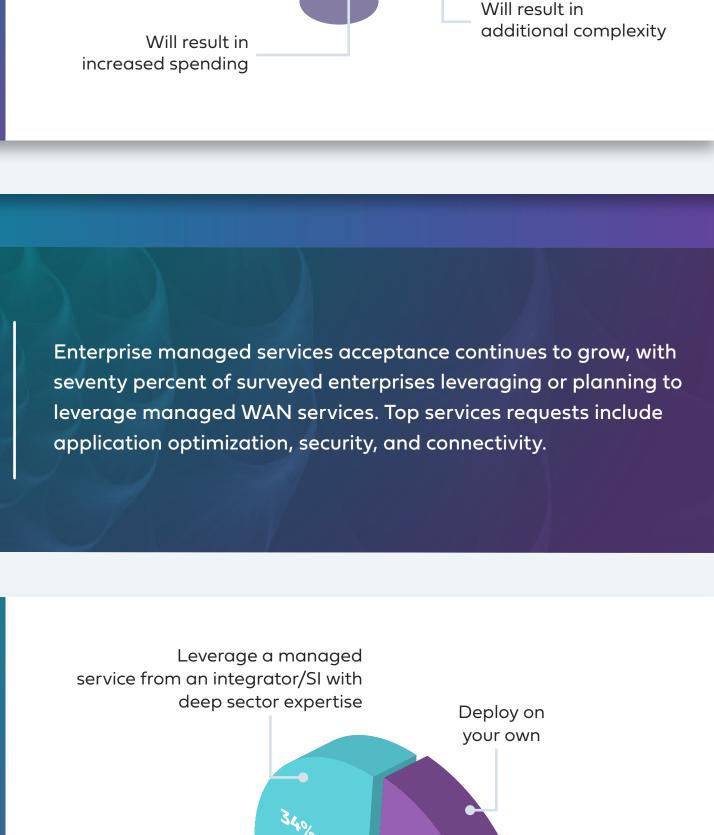
For WAN transformation, over seventy

while only eighteen percent plan to

much like the cloud, in a very dynamic

percent are looking to a managed service,

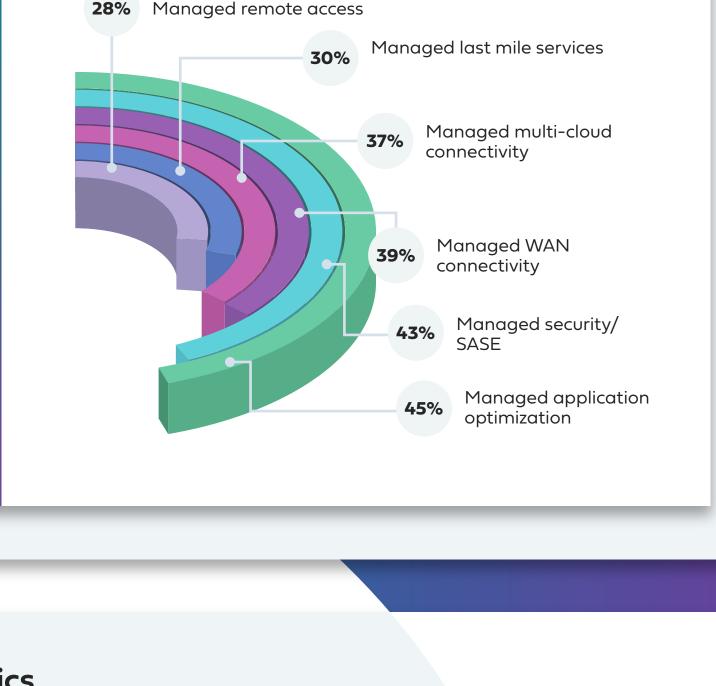
implement on their own. This also speaks to the importance of an OPEX-driven model,



environment.

percent.

Managed Services Feature Requests As part of a managed services offer, top asks include application optimization at forty-five percent, security at forty-three percent, WAN connectivity at thirty-nine percent, a multi-cloud fabric at thirty-seven percent, and last mile management at thirty percent, and remote access at twenty-eight



Leverage a managed service

from a generalist provider

Organizational Demographics 29% **7**% Europe China North

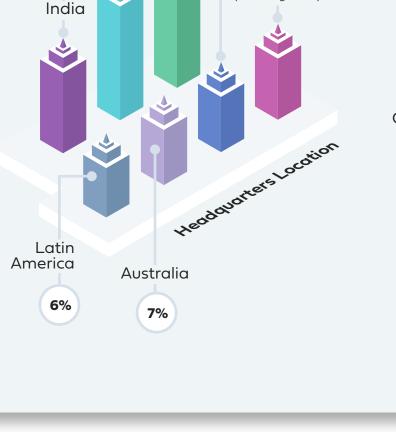
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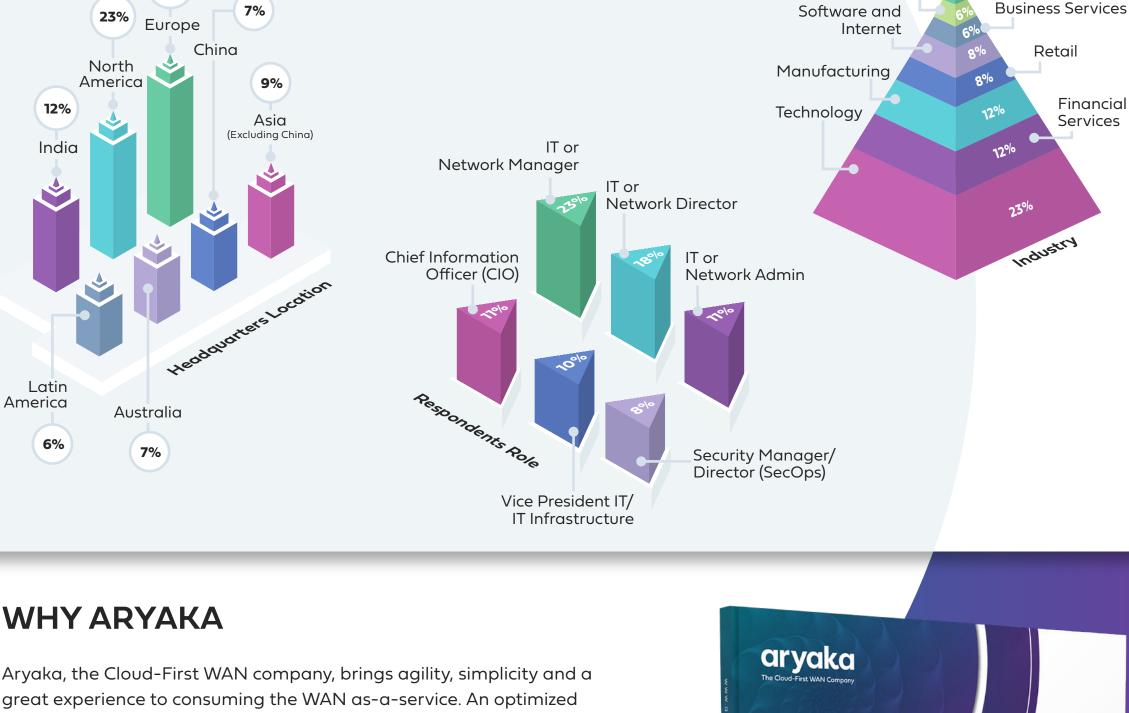
Asia

(Excluding China)

America

12%



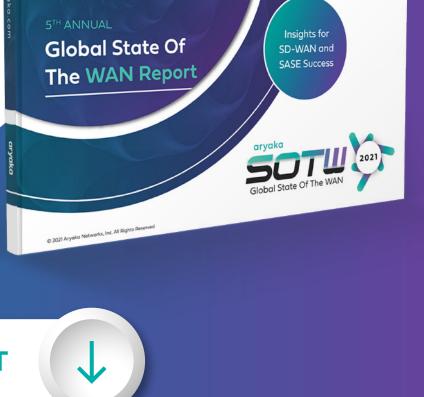


global network and innovative technology stack deliver the industry's #1 managed SD-WAN service and set the gold standard for application performance. Aryaka's SmartServices offer connectivity, application acceleration, security, cloud

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networking and insights leveraging global orchestration and provisioning. The company's customers include hundreds of global enterprises including several in the Fortune 100. **DOWNLOAD SURVEY REPORT**



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