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A NEW APPROACH TO CONNECTING A DISTRIBUTED WORKFORCE

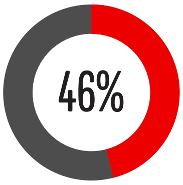
The following is an excerpt from the IDC Infobrief "Connecting and Securing a Distributed Enterprise and Remote Workforce", sponsored by ViewQwest.

Key trends driving network requirements of the hyper-distributed enterprise

Enterprise networks have become a lifeline for connectivity in the race to accelerate digital transformation. The increased adoption of cloud-based solutions, coupled with the rising need to address Internet of Things IoT) integration and to interconnect an increasingly remote workforce, is driving a rethink of network requirements.

Increased adoption of cloud

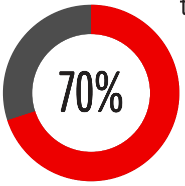
Asia/Pacific enterprise spending on cloud applications around applications development, applications, and systems infrastructure software is expected to rise from 13.7% of the total software spend in 2015 to 42.2% in 2020[1]



of Asia/Pacific organizations use 2-4 cloud providers[1]

In 2020, ~60% of Asia/Pacific organizations responded with no cut or a moderate/ significant rise in the number of cloud providers after COVID-19.[2]

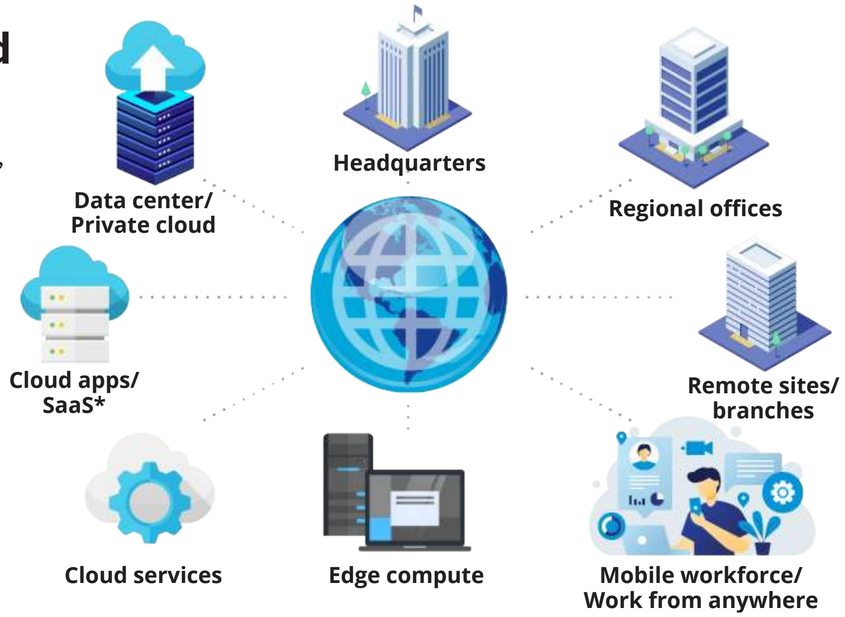
Supporting the remote office



70% of Asia/Pacific organizations are expected to make changes to their business models, ICT infrastructure investments and work environments to accommodate for a widely dispersed workforce, according to IDC's COVID Wave Survey 2020.[4]

Work from anywhere scenarios have permeated into every sector

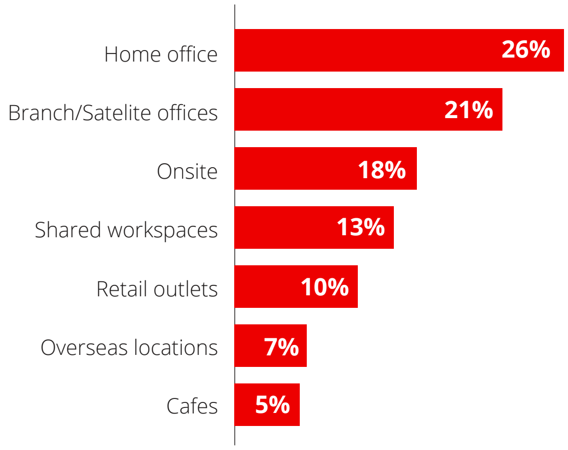
Securing a mobile and remote workforce has become an urgent imperative, with corporate resources being accessed from unprotected locations and devices.



Steady growth in IoT

IDC estimates the number of IP connections to grow at a compound annual growth rate (CAGR) of 18.6% over the forecast period from 3.78 million in 2018 to 11.94 billion in 2024.[3]

Preferred primary workplace post-COVID-19 vaccine[4]

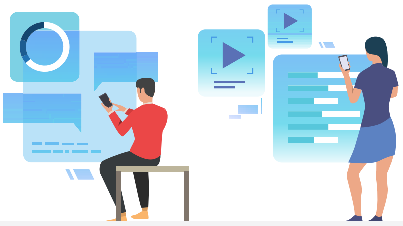


Traditional network architectures are not enough to cater to this distributed environment and result in significant challenges around security, application performance, resiliency, and inter-dependencies.

[1] Asia/Pacific excludes Japan and China. Source: IDC's Asia/Pacific Public Cloud Services Spending Guide, 2020
[2] Asia/Pacific excludes Japan. Source: IDC's Asia/Pacific IT Services 2020 Survey (fielded Apr-Jun 2020
[3] IDC's Asia/Pacific (Excluding Japan) Internet of Things Connectivity Forecast and Analysis, 2020-2024
[4] IDC's COVID Wave Survey 2020

Challenges facing distributed organizations with a remote workforce

Asia/Pacific enterprises' top 3 network and ICT challenges:



#1 Limited flexibility and agility with in-house management of WANs

- Lack of central monitoring, control and troubleshooting to manage today's complex and distributed network environment.
- Troubleshooting network and access issues for remote workers on their home networks.

Business Impact

Inefficient network management and outages

Finance/Banking: Frequent outages and long network resolution times result in Internet/mobile/ATM banking access issues, impacting customer experience and increasing churn.

#2 Ensuring consistent application performance for better user experience

- Subpar application performance for hosted enterprise as well as SaaS applications is a big challenge.
- In addition to the corporate environment, monitoring and ensuring application performance for a widely dispersed workforce through VPNs has proven to be difficult.

Business Impact

Subpar application performance

Retail: Slow checkout at a retail store resulting in only being able to serve 1/3rd of customers; slow checkout of self-service kiosks forces a half day shut down

#3 Managing security and compliance of mobile workers and for a widely distributed organization

- Securing a distributed environment where the network connects to a variety of unprotected devices, 'things' and clouds.
- Piecemeal approach to securely connect a mobile workforce that requires remote access to business applications.
- Lateral security risks due to interconnected branches and applications

Business Impact

Compromised network security

Manufacturing: Network hackers manipulated control systems so that a German steel mill's blast furnace could not be shut down, resulting in massive damage to the machinery.

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*IDC Asia/Pacific COVID-19 Wave Survey and IDC Communications Survey 2020

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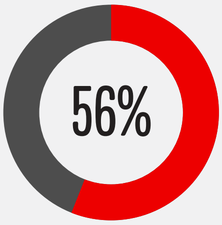
Software-defined approach to networks and security for a new era

The increasing reliance on cloud services and applications, along with the need to connect a widely dispersed workforce, is driving organizations across the Asia/Pacific region to rethink how their enterprise WAN is architected.

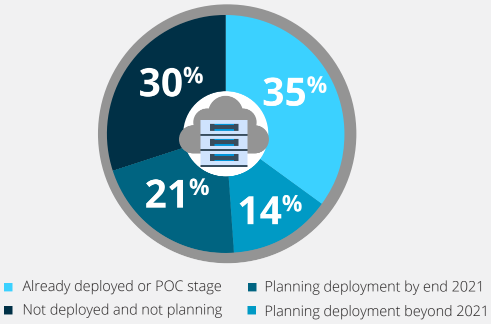
This has led to the advent of a software-defined approach to networking, starting with a software-defined WAN (SD-WAN).

An SD-WAN provides a secure, flexible, and agile network to the business, through centralized management of hybrid WAN connectivity and dynamic path selection of network traffic.

SD-WAN is fast becoming an integral part of enterprise recovery strategy following the pandemic



of Asia/Pacific organizations have either already deployed or are planning to deploy an SD-WAN solution by the end of 2021



Benefits of a software-defined approach

Policy-based control and WAN optimization
Enhanced operational efficiency
Cost optimization
Flexibility of deployment and management models
Integrated security
Faster deployment

However, as SD-WAN deployments have scaled, integrated security has become increasingly important to organizations, in an effort to respond to the move to a hyper-distributed and hybrid working model.

> **"Working from home has led to changes in the way we work and how we collaborate internally and externally, permanently changing our internal processes in a post-COVID world."**
>
> **A leading Asian bank**

Source: IDC Communications Survey 2020

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Integrated security and SD-WAN driving enterprise conversations

As SD-WAN deployments have scaled, enterprises are realizing that this important technology does not solve all of their pain points at the edge of their networks. There are a variety of other network, security, and management tasks that they must consider when architecting their branch and WAN connections. **Security tops the list of considerations** as organizations grapple with an ever-widening enterprise perimeter. However, there's a challenge.

Challenge

SD-WAN integrations with third-party security services, and with other network services in a branch context, have been pursued by enterprises, but they are complex and difficult to execute.

Service insertion, service chaining, and orchestration of third-party virtual network functions (VNFs) are invariably difficult, as highlighted by both service providers and enterprises.

Top Priority

When asked to identify features that are required in a next-generation SD-WAN platform, **integrated security functions and services** came out on top of the list, according to IDC's Worldwide Communications and SD-WAN Survey 2020.

The integration of network, security, and management functions represent an evolution of the SD-WAN market towards a broader software-defined branch, an IDC reference architecture when enterprises deploy multiple virtual or container network functions, either on-premises or in the cloud, in a tightly integrated network and security solution environment.

IDC believes that by opting for a unified suite of network and security VNFs from a single vendor for both SD-WAN and security, organizations stand to gain several benefits, including a holistic view and management of network and security policies, as well as operational efficiency of the ir network and security teams.

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Source: IDC Communications Survey 2020

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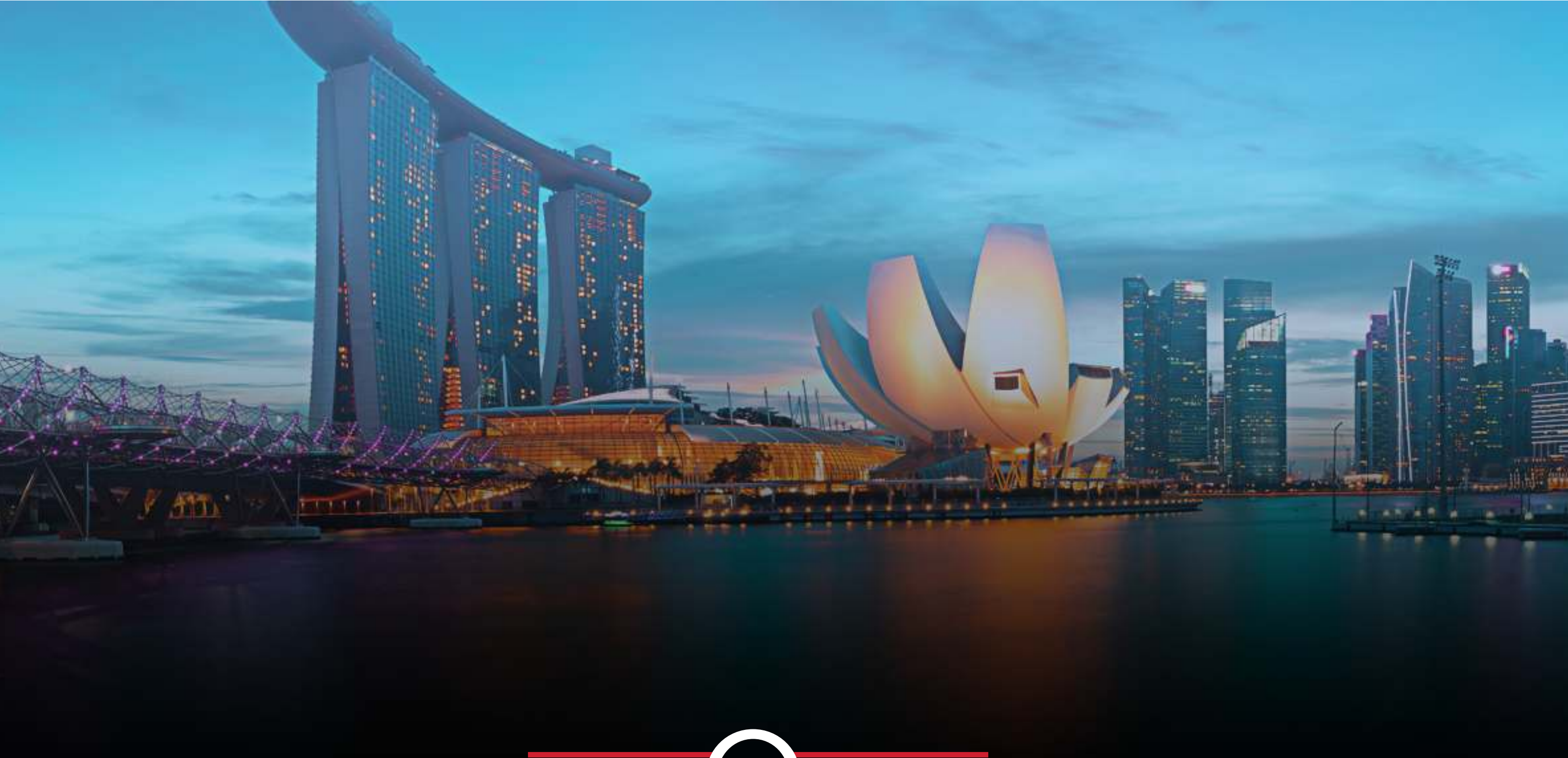

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