

Aryaka's Fifth Annual Global State of the WAN Report Reveals Network Insights from 1,350 Global Enterprises

Submitted by: Aryaka

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Top Observations Include Increased Coupling of Networking and Security Planning (SD-WAN and SASE) and Support for Hybrid Work Environments

London, UK. – March 23, 2020 – Aryaka® (<https://www.aryaka.com/>), the leader in fully managed Cloud-First WAN solutions, today published its fifth annual 2021 State of the WAN Report (<https://www.aryaka.com/state-of-wan-2021/>), the industry's foremost survey into global SD-WAN and SASE planning. Key trends identified in this year's report include:

- Accelerating fusion of networking and security planning, with almost a third of enterprises stating that they are already deploying what they consider to be a secure access service edge (SASE) architecture.
- A hybrid work environment that will persist after the pandemic recedes, with over 80% stating that they expect over a quarter of workers to remain remote, and over two-thirds desiring flexibility between on-premises and remote deployments.
- Continued WAN and application growth, resulting in increased network complexity. The number of enterprises reporting they're deploying over 500 distinct applications has grown to 46%. 37% of enterprises identify complexity as their number one network concern.
- 43% of enterprises identify application performance as an underlying driver for WAN transformation. However, WAN transformations have slowed this year due to the pandemic.
- Over 70% of enterprises intend to move to managed services versus just 18% who prefer the autonomy of a do-it-yourself WAN solution.

"Every year I look forward to Aryaka's high quality State of the WAN report for information on industry trends," said Scott Raynovich, founder and chief analyst at Futuriom. "This year, the report reflects many of the same trends we are seeing at Futuriom, which include the ongoing integration of cloud-based networking services and security -- otherwise known as Secure Access Service Edge (SASE) -- as well as strong demand for virtualized networking solutions targeted at Work from Anywhere (WFA) and hybrid work environments. It's a good read!"

Year-on-Year Trends with Changing Challenges and Priorities

The WAN continues to extend its reach, with the number of enterprises connecting to over 100 inter-regional sites growing by 50%, from 19% in 2020 to 28% in 2021. This is coupled with continued application growth, with the number of enterprises stating that they've deployed over 500 distinct applications growing to 46%, compared to 32% in 2021. As evidence of collaboration traction, Zoom was identified as critical by 36% in 2021, up from 25% in 2020.

One finding that did not noticeably change year-on-year is complexity, which was identified by 36% of enterprises as their number one network issue. Interestingly, those who identified cost as a major issue grew to 20% in 2021 from 16% in 2020, a 25% increase. This may be attributed to cloud or MPLS cost concerns.

Overall, investment priorities did see recede in some areas, due to tactical pandemic concerns driving near-term planning. For example, only 17% of respondents plan to conduct an SD-WAN/SASE-driven network refresh this year versus 29% in 2020. However, combining this with remote access upgrades, a new entry at 22%, and security, at 21%, results in strong momentum going into 2021. In contrast, LTE/5G experienced growth from 24% in 2020 to 31% in 2021. Finally, VPN investment is at 31% this year versus 27% in 2020. Aryaka believes the new remote workforce, due to the pandemic, led to this VPN increase.

For actual deployment, managed services still reign supreme at 71%, versus 18% who are looking for a do-it-yourself (DIY) solution. Many enterprises are also further along the deployment lifecycle, with 26% evaluating SD-WAN this year, up from 22% in 2020. This increasing market maturity is reflected in a drop in identified barriers to SD-WAN adoption. Enterprises are less concerned that the WAN service won't address application performance, coming in at 36% this year, versus 43% in 2020, with corresponding drops in SLA concerns, technology maturity, and lack of skills.

A Closer Look at SASE and the Rise of the Hybrid Workplace

Enterprise SASE deployment plans are accelerating, with 29% stating that they are already deploying what they consider to be a SASE architecture. Another 56% are planning to deploy a SASE architecture in the next 12-24 months. As part of a complete SASE architecture, the top capability identified was SD-WAN transport at 34%. And for deployment, over half state that they prefer a solution that includes technology from both their WAN vendor and security specialists, spanning across cloud and the edge.

When the pandemic hit, workers around the world migrated from their offices to their homes, a shift that will also impact future planning and investment throughout 2021. More than half (59%) of the respondents stated they expect 25-50% of their workers to remain remote, while 21% say they are planning for more than 50% of their workforce to continue working from home. Businesses are also prioritizing flexibility, with 63% stating that they consider the ability to quickly move resources between on-premises and remote to be very important.

"The fifth edition of the Global State of the WAN is bigger and better than ever, with survey inputs and insights from over 1350 Enterprises worldwide," said Shashi Kiran, CMO of Aryaka. "On behalf of Aryaka Networks, I would like to express my gratitude to those who participated in this survey, and hope this serves as an excellent resource and guidebook for all those CIOs, network, cloud and security practitioners to leverage and proactively Plan their WAN™. Of particular interest are the trends focusing on SD-WAN and SASE deployments."

Study Methodology

The Fifth Annual Global Aryaka 2021 State of the WAN study surveyed over 1350 global IT and network practitioners at enterprises spanning all verticals, headquartered in NA, APAC and EMEA. The survey asked

respondents about their networking and performance challenges, priorities and their plans for 2021 and beyond.

Aryaka to Host 2021 The State of the WAN Webinars

Join us at the following dates/times for a lively panel discussion on the “Aryaka 2021 Global State of the WAN.” Regional observations will also be presented:

North America March 23, 1pm EST, 10am PST

Register Here (<https://www.brighttalk.com/webcast/17572/472576>)

EMEA March 23, 3pm GMT

Register Here

(<https://event.on24.com/wcc/r/3053211/36A05D5AA988F1ED336A31F7D73BA1F3?partnerref=informattech>)

APAC - March 24, 930am IST, Noon Beijing

Register Here (<https://www.brighttalk.com/webcast/17572/472578>)

This interactive format allows the panel of experts to deep dive into the Fifth annual State of the WAN report, which will include further analysis of the key findings driving digital transformation.

Download Report Here: <https://www.aryaka.com/state-of-wan-2021/>

Download Infographic Here: <https://www.aryaka.com/docs/aryaka-state-of-the-wan-2021-infographic.pdf>

Additional Resources:

Aryaka Managed SD-WAN as-a-Service (<https://www.aryaka.com/docs/smartservices-datasheet.pdf>). This datasheet explains how the Aryaka SmartServices platform is built for the Cloud-First world. Specifically, this means there are no products to buy, and no inventory, deployment hassles, patches or configurations to worry about.

Aryaka's Cloud-First WAN for Dummies (<https://www.aryaka.com/cloud-first-wan-for-dummies/>). This e-book explains everything you need to know about consuming your network as-a-Service, how to achieve fully integrated security, and how to make your network as easy as your cloud.

For more on Aryaka, please visit:

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About Aryaka

Aryaka, the Cloud-First WAN company, brings agility, simplicity and a great experience to consuming the WAN-as-a-service for network and security. The company provides an optimized global network and innovative technology stack, delivering the industry's #1 managed SD-WAN service and setting the gold

standard for application performance. Aryaka's SmartServices platform offers connectivity, application acceleration, security, cloud networking and insights that leverage global orchestration and provisioning. The company's customers include hundreds of global enterprises including several in the Fortune 100.

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