



Network and Security Transformation Empowers the Business

Network Transformation Underpins the Enterprise Digital Journey

During the pandemic, roughly one-third of organizations quickly adopted a digital-first strategy that they continue to extend.



Improving business outcomes:

Most organizations reported increases in worker productivity up to 24%, yet 55% still plan to invest in security/private network platforms to stay connected with employees.

Source: Future Enterprise Resiliency and Spending Survey - Wave 4, IDC, May 2021; n=832

Emerging use cases:

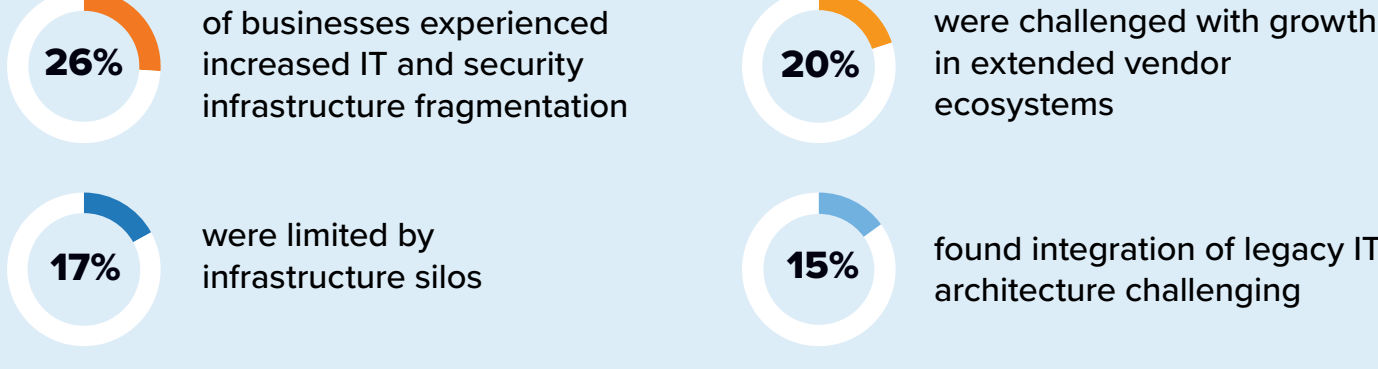


Source: Future Enterprise Resiliency and Spending Survey, IDC, February 2021; Base=738

Network Transformation Is a Risky Business Requirement That Can Undermine Trust



Transformation leads to complexity:



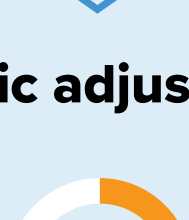
Source: Future of Trust Survey, IDC, February 2021; n=507



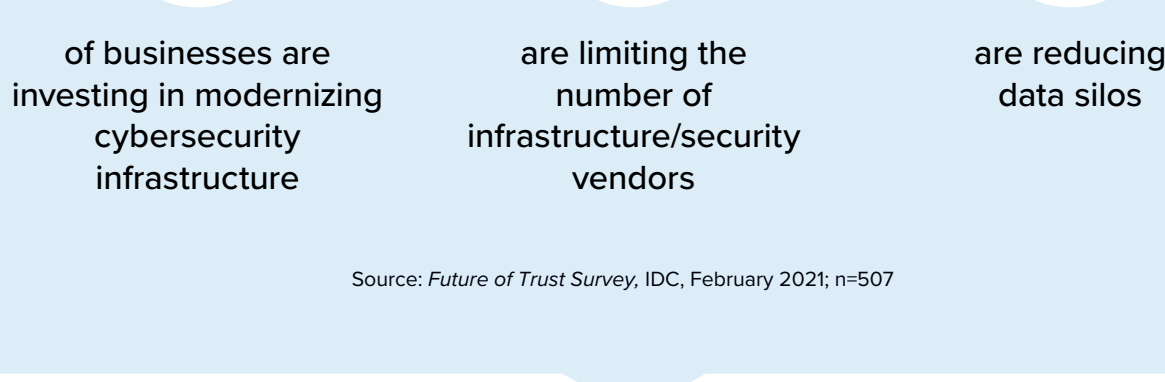
Cybercriminals feast on outdated defenses:

Ransomware payments on average jumped from \$184,000 to \$354,000 in North America from July 2021 to August 2022.

Source: Future Enterprise and Resiliency Survey - Wave 7, IDC, August 2022; n=776



Strategic adjustments:



Source: Future of Trust Survey, IDC, February 2021; n=507

SASE Addresses Aspects of Network and Security Transformation

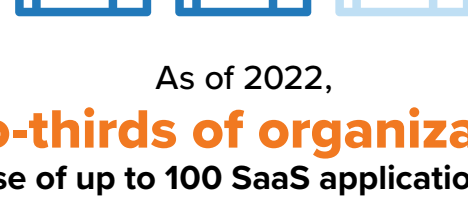
SASE helps enterprises address application performance, security management, secure cloud connectivity, and unpredictable bandwidth demand through the convergence of network and security management.



The majority of enterprises say cloud computing and network bandwidth/connectivity have the most impact on enterprise WAN.

As a result, 40% of enterprises will increase spending on SASE in the next two years.

Source: 2022 IDC SD-WAN and SASE Uptake Survey



As of 2022, nearly two-thirds of organizations reported use of up to 100 SaaS applications,

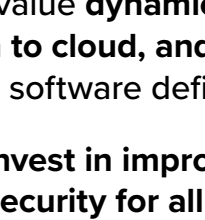
Source: SaaSPath Survey, IDC, April 2022; n=1,180

a steep increase from 2020 when most organizations reported use of 10 or fewer SaaS applications.

Source: Data Security Survey, IDC, January 2020; n=547

Still, businesses identified security as the second leading barrier to further SaaS adoption.

Source: SaaSPath Survey, IDC, April 2022; n=1,180



The majority of enterprises value dynamic path optimization, network segmentation from branch to cloud, and secure direct cloud access when deploying software defined architecture;

41% noted plans to invest in improved network bandwidth and security for all users.

Source: Future Enterprise and Resiliency Survey - Wave 11, IDC, December 2021; n=858

SASE Delivers Enhanced and Integrated Security for the Enterprise

A modernized approach that is designed to meet the unique security and networking needs of a digital-first organization is a true business enabler.



81% of organizations are prioritizing digital trust programs for 2022 and 2023 to assuage customer and partner concerns about data privacy, security, compliance, and ability to deliver.

Source: Future Enterprise Resiliency and Spending Survey - Wave 5, IDC, June 2022



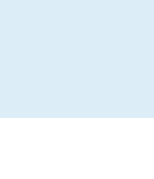
65% of organizations cited advanced firewall, including threat protection, as the most important feature of SASE.

Source: US Enterprise Communications Survey, IDC, August 2022, U.S.; n=516



One in five organizations listed discovery of unauthorized cloud app usage as a top three capability of CASB, and 44% of organizations noted plans to increase spend on CASB solutions in 2023.

Source: Security ProductsView 2022, January 2022, IDC; n=162. Security ProductsView 2022, January 2022, IDC; n=638



14% of organizations were planning to increase their investments in ZTNA in response to gaps triggered by COVID-19; 43% of organizations noted the "accelerating migration to the cloud" as the top reason.

Source: Security ServicesView Survey 2022, IDC, February 2022; n=1,500

Considerations to Future-proof SASE Implementation

Related factors to consider for successful transformation:



Managed services:

Businesses are increasingly planning – from 21% in 2022, to 28% by 2025 – to outsource IT security infrastructure. Reasons from 2022 to 2025 include detection (40%) to improved security during DX initiatives (38%).

Source: Outsourced Cybersecurity Services (MSS, MDR, DDoS) Survey, IDC, December 2021



Strategy:

35% of enterprises plan to invest in technologies that connect people, processes, applications, and things; 32% are focused on improving customer experience and satisfaction.

Source: IDC's 2021 Future of Connectedness Survey, July 2021



Productivity:

37% of enterprises prioritize operational agility through investments that increase employee and organization productivity, (e.g., collaboration, remote access, and VPN).

Source: 2022 SD-WAN and SASE Uptake Survey

Message from the Sponsor

Lumen operates a highly peered IP backbone offering high density edge PoPs in major metros with more onramps to cloud-based SASE services and applications. The Fortinet Security Fabric unifies network and security management in a single pane of glass operating at optimal speeds for maximum throughput and efficiency.

Visit lumen.com/sase to find out more