WAN SUMMIT

8 & 9 April 2019, New York

We asked the audience

What type of network security do you have deployed on your WAN?

49%
Mix of the two

7%
Cloud based

44%
Edge based
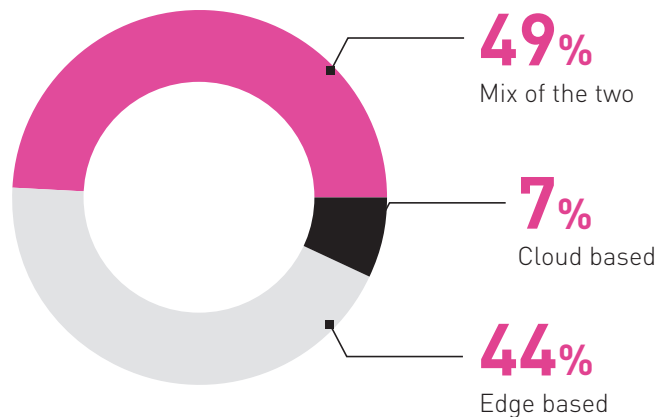
How does your organization manage network security?

60% Mix of IT and WAN teams

28% An IT team separate from WAN/infrastructure

12% WAN/infrastructure management team
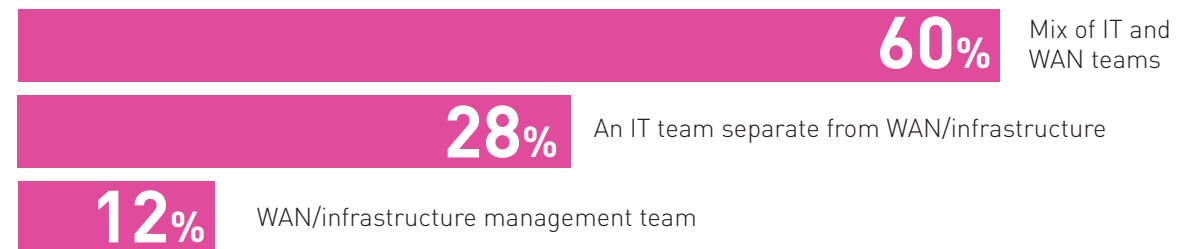
What stage of SD-WAN adoption are you in?

30%
Actively researching vendors and options

3%
Do not plan to adopt SD-WAN

27%
Currently piloting or rolling out service

3%
Have not yet seriously considered adopting SD-WAN service

28%
Have already installed SD-WAN service on at least part of the network

9%
Seriously considering SD-WAN service, but have not begun process

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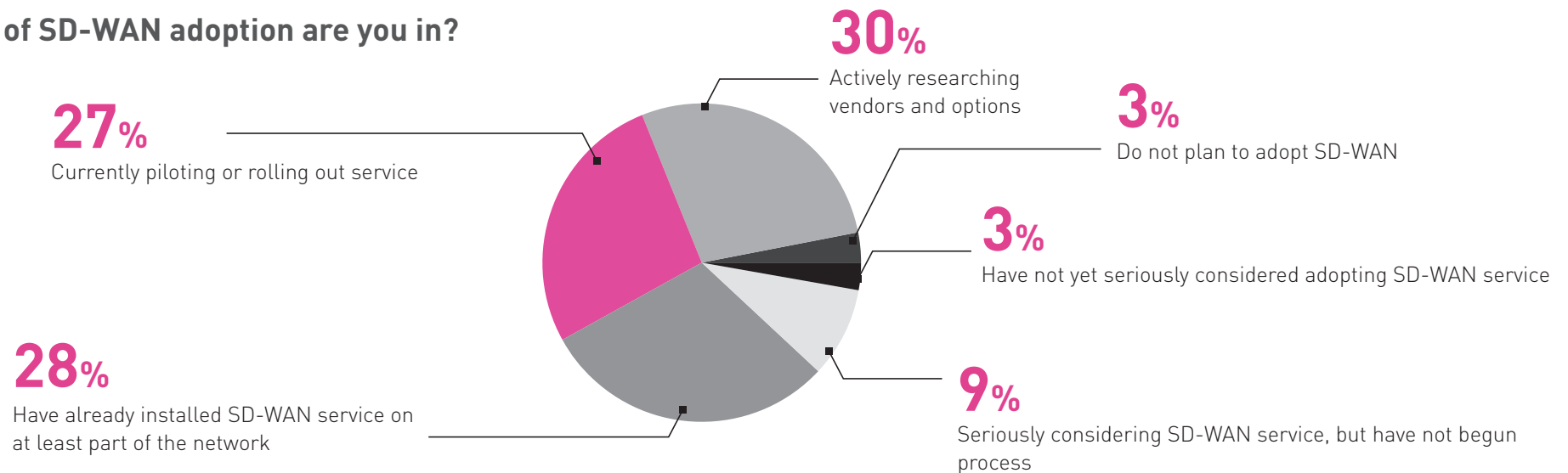
We asked the audience

What tends to be the primary reason for pursuing SD-WAN?

Improve network performance

Cut costs

Increase capacity

Use alternative access technologies (broadband, LTE, etc.)

Reduce provisioning time

Other

Improve security
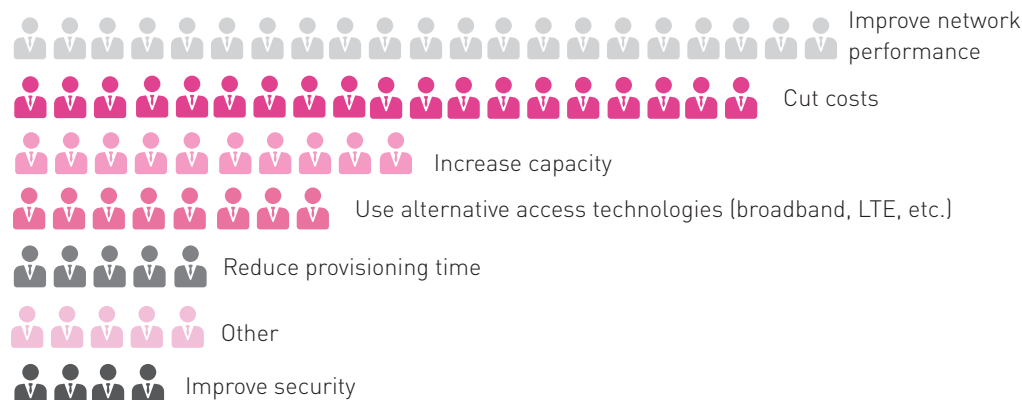
What type of vendor did you select or plan to select for SD-WAN service?

46% From a carrier/network operator as a managed service

37% Directly from an SD-WAN vendor

9% No preference

5% From a carrier/network operator but not as a managed service

3% From an outsourced network manager (not a carrier/ network operator)
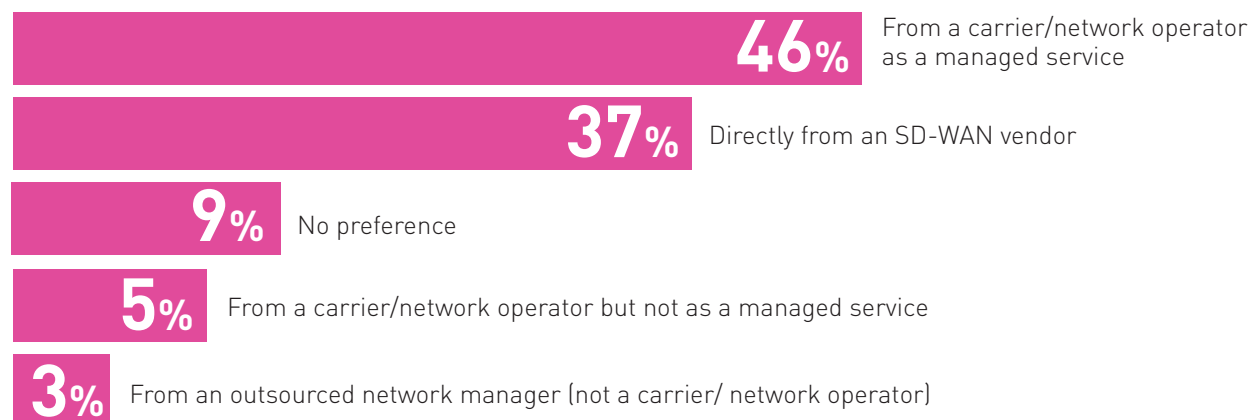
What SD-WAN service feature is most important to you in selecting an SD-WAN vendor?

29% Deployment model (hardware vs. virtual appliance)

24% Other

5% Specific VNFs available

16% Pricing

16% Security features

10% Monitoring features

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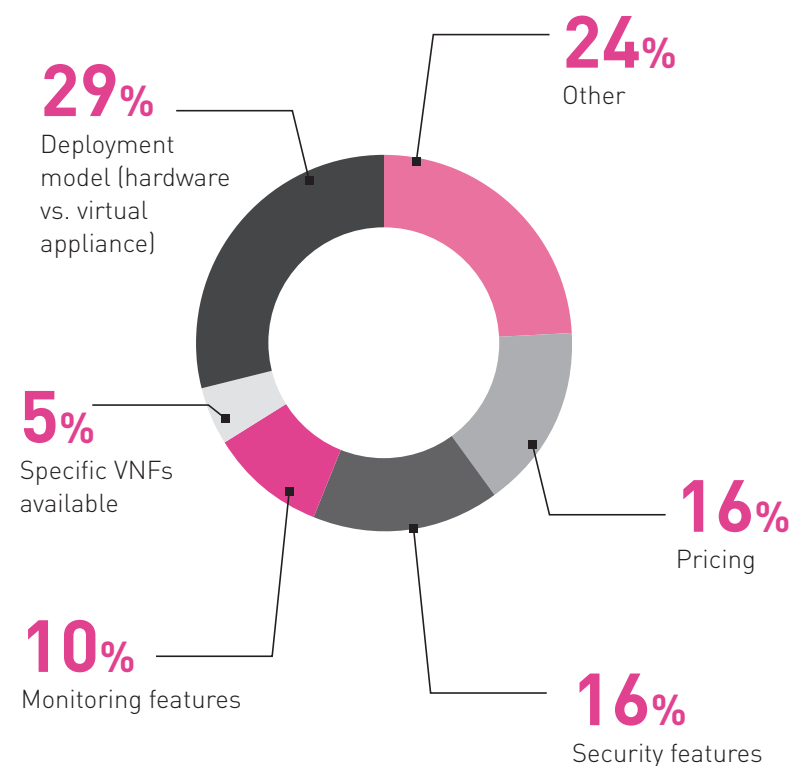
We asked the audience

Do you primarily source your global WAN from:

- **64%** A mix of global and regional providers
- **23%** A single global provider
- **14%** Multiple regional providers
- **0%** A single regional provider
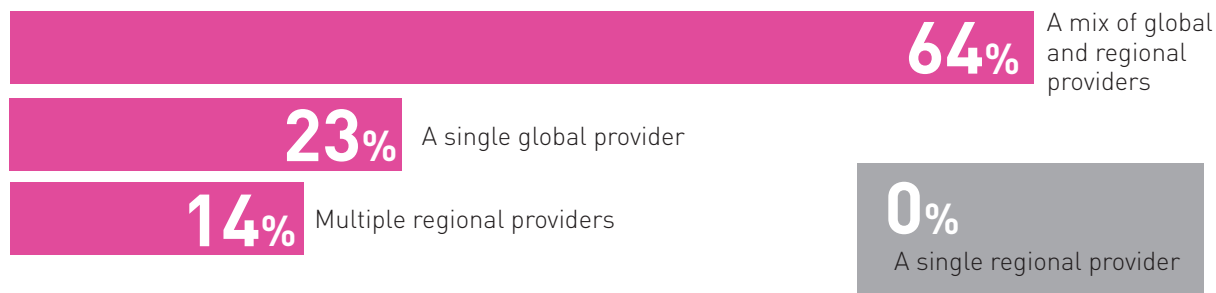
How many sites do you have on your WAN?

- **33%** 201-500
- **28%** ≤200
- **22%** 501-1000
- **17%** >1000
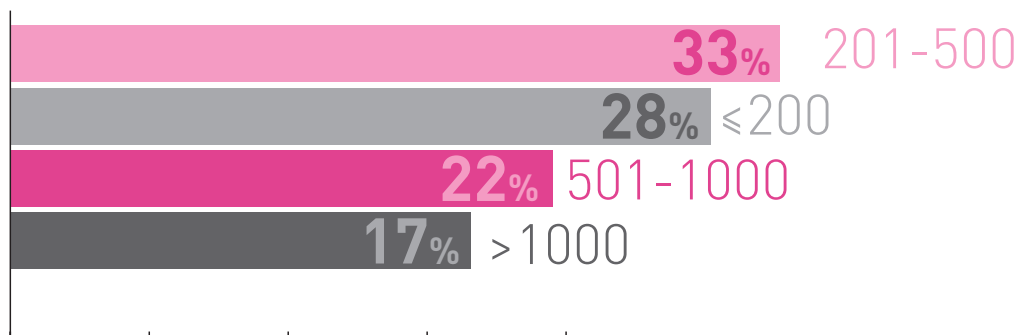
What best describes your WAN optimization strategy?

- Feature of SD-WAN service or VNF
- Dedicated service from a WAN optimization supplier
- Do not need WAN optimization

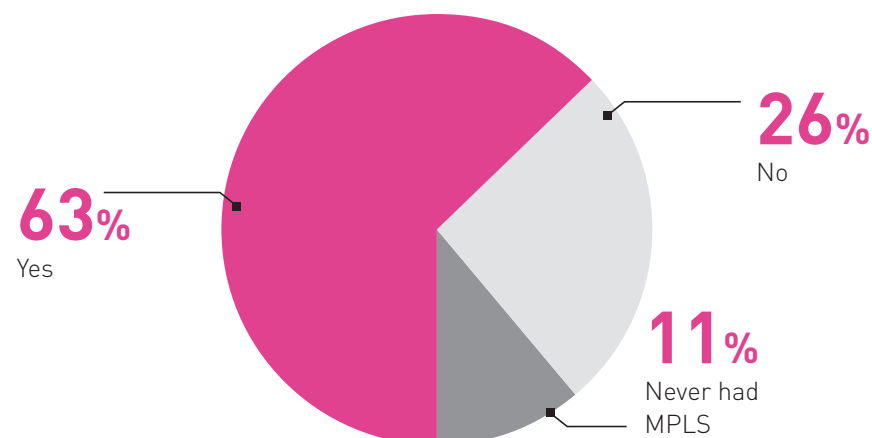### What is your average bandwidth per WAN site?

- **14%** <5 Mbps
- **23%** 5-10 Mbps
- **27%** 11-50 Mbps
- **25%** 51-100 Mbps
- **11%** >100 Mbps
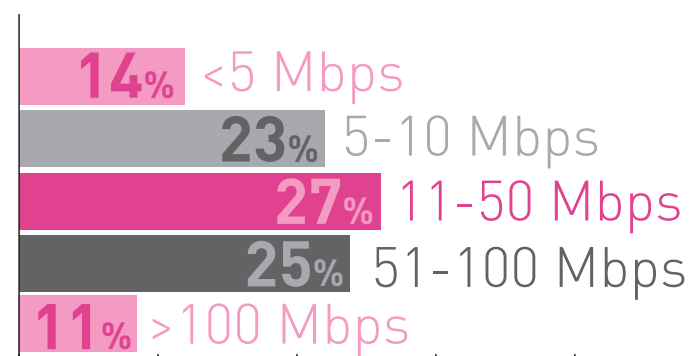
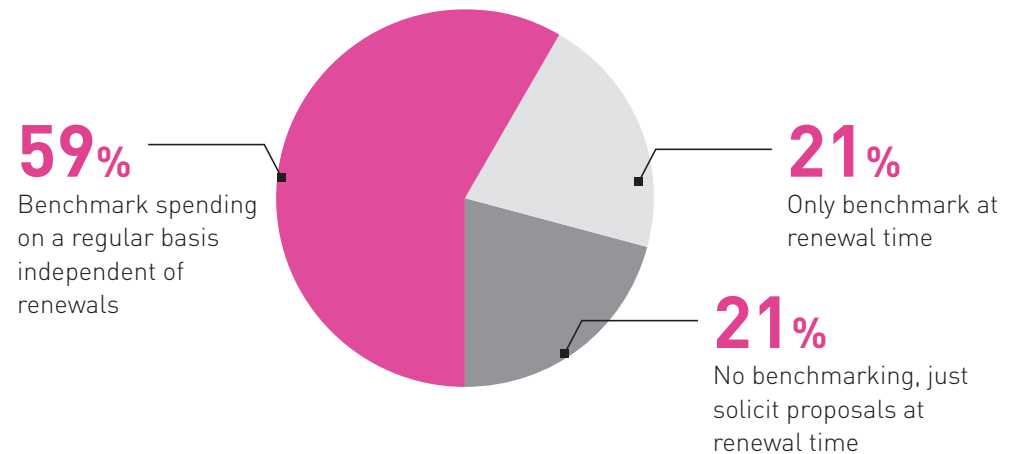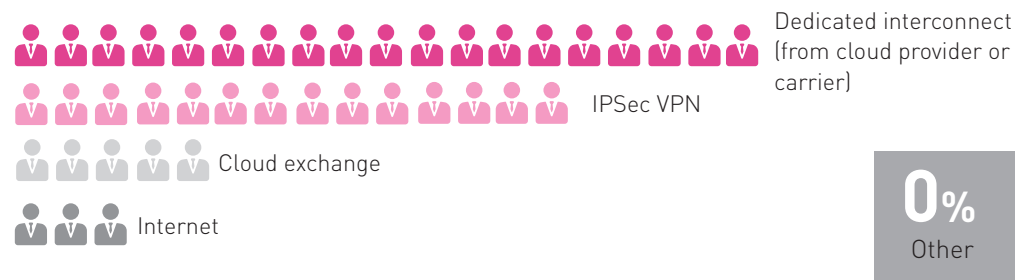### Do you anticipate keeping MPLS service at all or most sites in your WAN in the next year?

- **63%** Yes
- **26%** No
- **11%** Never had MPLS

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We asked the audience

What best describes your current network monitoring strategy?

49%
Dedicated service from a network monitoring supplier

35%
Feature of SD-WAN service or VNF

17%
Rely on connectivity provider portal
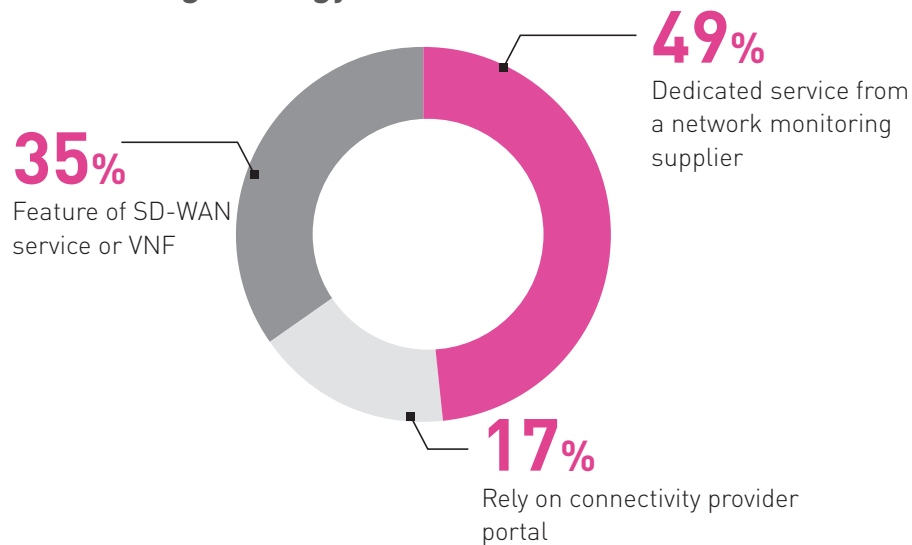
How do you benchmark network spending?

59%
Benchmark spending on a regular basis independent of renewals

21%
Only benchmark at renewal time

21%
No benchmarking, just solicit proposals at renewal time

How do you most typically connect to your IaaS partners?

Dedicated interconnect (from cloud provider or carrier)

IPSec VPN

Cloud exchange

Internet

0%
Other

How do you most typically connect to your IaaS partners?

45%
Dedicated interconnect (from cloud provider or carrier)

33%
IPSec VPN

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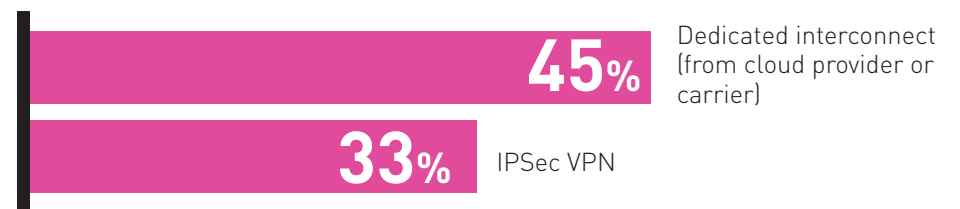
We asked the audience

What best describes your IaaS suppliers?

Multiple IaaS partners

Single primary IaaS provider with any others as backup only

No IaaS partners
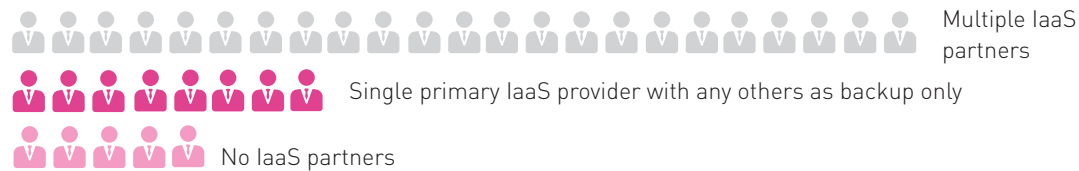
How many data centers do you have in the network?

15% 1-2

34% >5

21% 2-4

32% 5
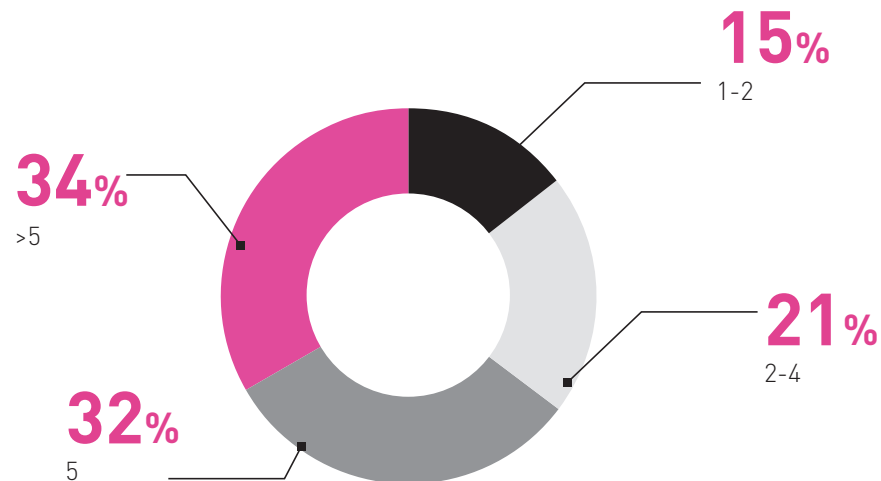
How many SaaS platforms do you support for your internal users via the WAN?

18% 1-5

36% >20

18% 6-10

28% 11-20
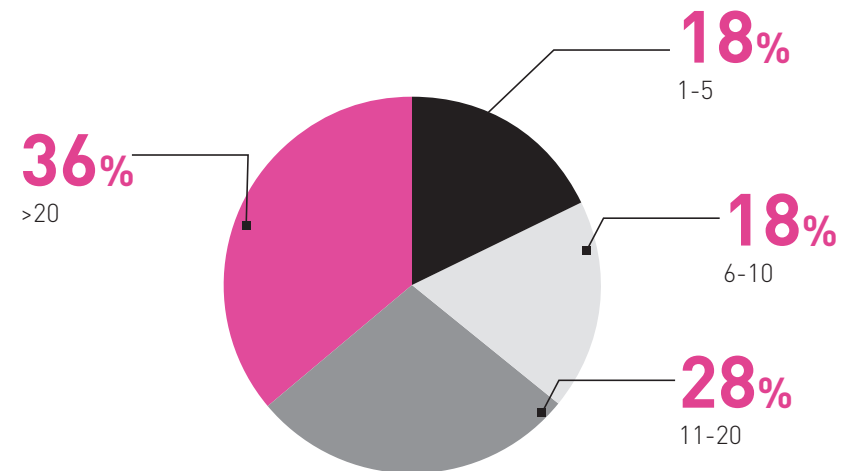
What is your primary means of internet access?

50% Primarily DIA, stand-alone

21% Primarily broadband

17% Substantial mix of DIA, broadband, and suppliers

13% Primarily DIA bundled with VPN service

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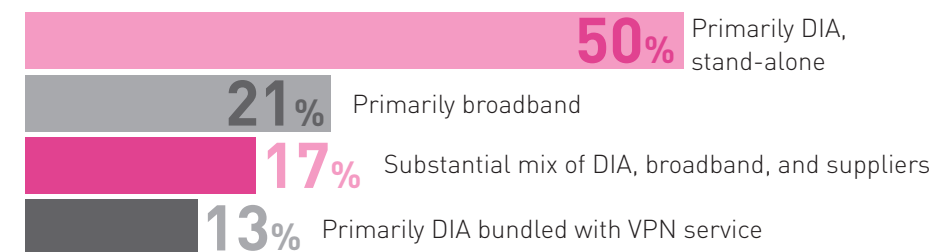
We asked the audience

How do you use fixed cellular connectivity?

- **44%** Don't use fixed cellular
- **30%** Connectivity option of last resort
- **26%** Primarily for backup
- **0%** A primary part of connectivity portfolio
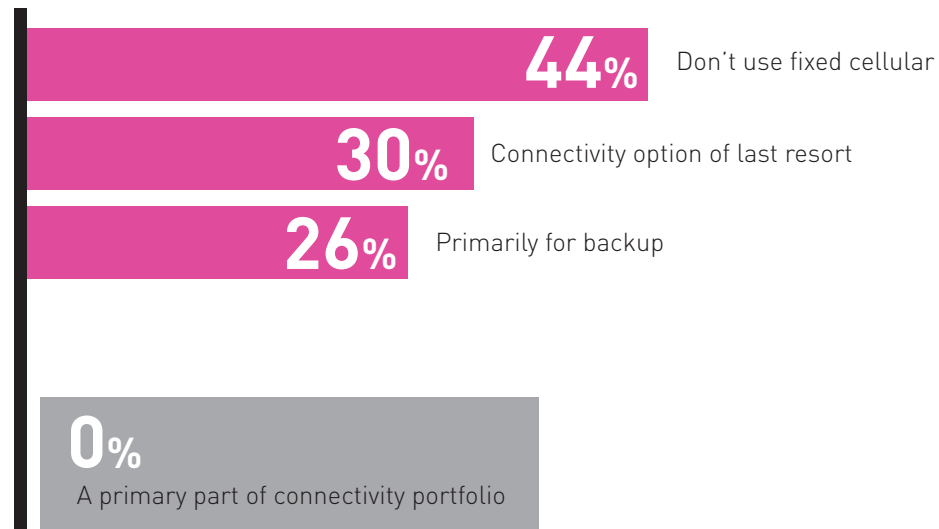
How do you use satellite connectivity?

- Don't use satellite
- Connectivity option of last resort
- Primarily for backup
- A primary part of connectivity portfolio
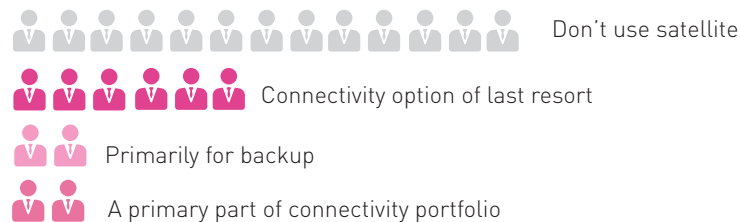
What is your preferred alternative to wireline access?

- **36%** Microwave
- **8%** Satellite
- **28%** Best available connection
- **28%** Fixed cellular
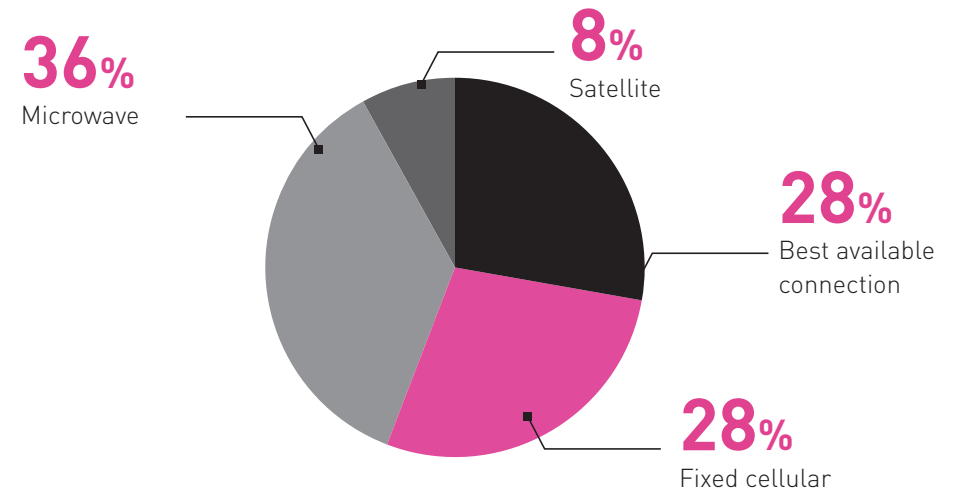
How do you connect sites in developing markets?

- **19%** Procure locally
- **39%** Best option from global system integrator or consultancy
- **11%** Same as developed markets
- **31%** Best option from global VPN supplier

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