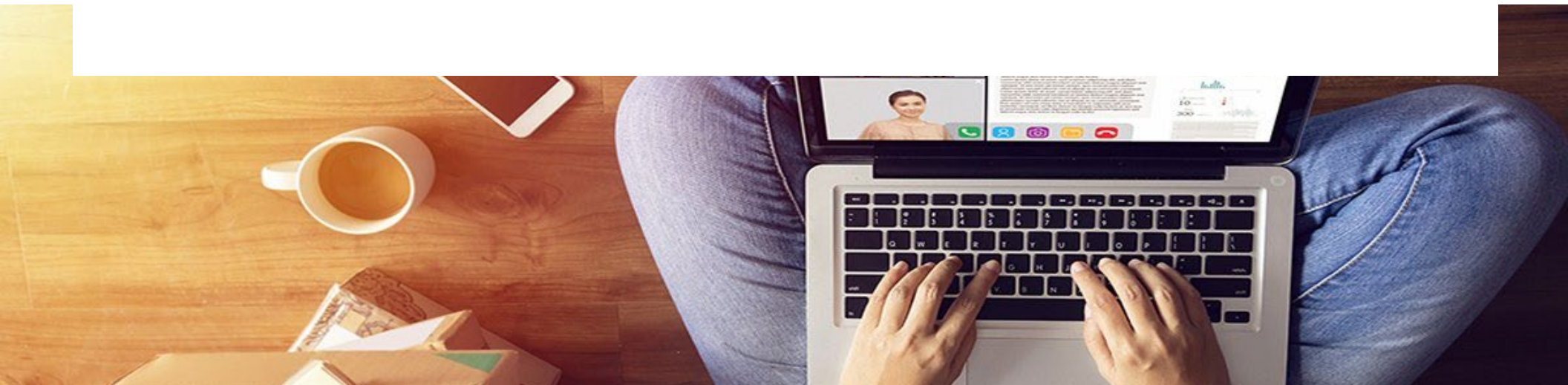


# The rise and rise of SD-WAN in post Covid-19



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  - SD-WAN goes mainstream in remote work surge but network visibility, security are concerns
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So much has been up in the air in the wake of the onset of Covid-19 and the lockdowns and stay-at-home orders issued by various governments around the world. But there has been one thing that is pretty fixed: the rise and rise of software-defined wide area networks (SD-WANs).

The drive towards SD-WAN began in earnest in 2019 and has actually gathered pace during the coronavirus pandemics as the massive increase in home working, which is set to exist for a long time if not permanently, has driven firms to think deeply about their network infrastructure. In particular, how and when companies can access applications that they have increasingly migrated to the cloud.

Now, more than six months into 2020, the SD-WAN market is showing signs of an evolution, moving toward larger scale and globalised deployments. SD-WAN vendors are now releasing features designed to support deployment at scale, allowing multi-

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tenancy where enterprises can define sub-regions for their WANs that are to be managed independently. In fact his maturity is now commonly accepted to have reached a stage where while there is still a lot of education to do in some markets, the business has reached a stage when SD-WAN vendors are focusing on explaining to customers why a particular offering is best and how it aligns with strategic corporate directions.

The net result is that SD-WAN suppliers are currently seeing significant increases in orders and deployments of appliances in residential locations to connect and secure remote workers. Security application visibility and performance tuning are regarded as key areas for 2020 growth.

Yet, there are signs that work still needs to be done. Research has highlighted the first signs of what could be stumbling blocks ahead. That is there are indications of some confusion among UK IT leaders regarding the benefits of SD-WAN, a growing feeling that some organisations feel that it is less relevant to the burgeoning remote workplace that's emerged since lockdown. This makes SD-WAN selection more important than ever.

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## Half of UK organisations question the relevance of SD-WAN in Covid-driven remote workplace

Joe O'Halloran, Networking editor

An investigation into the attitudes of IT leaders in the post-Covid-19 environment claims to have found “widespread confusion” among UK IT leaders regarding the benefits of software-defined wide area networks (SD-WAN), with nearly half of organisations saying it is “less relevant” to the burgeoning remote workplace that’s emerged since lockdown.

The study by IT consultancy [Accelerate Technologies](#) – *The future of SD-WAN in a UK economy* – was based on the views of 800 IT leaders in private sector construction, finance/accounting, legal and utilities sector organisations with over 500 staff and 10 or more offices/sites, across multiple industries, to uncover the opinions of SD-WAN and how it has changed since the Covid-19 coronavirus outbreak.

The top-line discovery from Accelerate was that 58% of IT leaders said the key challenge of the UK government’s work-from-home directive was [managing remote worker performance and support issues](#). Nearly half reported issues with bandwidth, 40% noted infrastructure capacity, while 42% said the increased

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number of dispersed and unmanaged remote worker devices was problematic and not having the visibility to measure and improve performance compounded the issue.

A quarter of the UK IT leaders surveyed were bringing forward cloud migration projects, with half prioritising projects to improve visibility and security for remote workers and cloud infrastructure because of Covid-19. Improving application performance for cloud-hosted apps/software as a service (SaaS) was found to be imperative since the pandemic.

Looking at SD-WAN and the future workplace, the survey found that 62% of IT managers already have, or plan to deploy, SD-WAN, with a vast majority (45%) improving application performance. Over a third said SD-WAN increased agility and reduced the cost of WANs, while half said their primary objective was to simplify the management of branch office infrastructure and enable secure branch office internet break-outs, which over half had achieved – potentially supporting the future remote workplace where number and size of office locations could possibly reduce.

Yet despite [the emergence and rapid take-up of SD-WAN](#), a third of organisations have no plans to deploy SD-WAN, with 55% favouring the emerging single cloud service model of secure access service edge (SASE), which converges SD-WAN features with cloud-based security services for remote workers and devices. Nearly half said WAN optimisation already gave them the required performance, or preferred the

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centralised security and single point of public entry offered by traditional multiprotocol label switching (MPLS) WAN architectures.

Of those with no plans to deploy SD-WAN, a quarter felt it didn't support remote worker access, even if 55% of organisations with SD-WAN said it had done exactly that. A third cited a lack of internal skills or difficulty finding a suitable technology partner that can fully own and manage the deployment as reasons for not considering SD-WAN.

Accelerate's data found that there is confusion among IT leaders around the benefits of SD-WAN and SASE. Just over two-thirds (43%) viewed [SASE](#) as a completely different use case to SD-WAN, while one in four saw SASE as an enhancement to SD-WAN architectures, bringing together secure zero-trust access for the new and increased remote workforce.

Assessing the key findings of the research, Darran Clare, director of technologies at Accelerate, said the remote worker challenges introduced by Covid-19 had naturally shifted people's focus from site-to-site WANs to the needs of a more flexible workplace, hence the increased interest in SASE architectures.

"We also see concrete proof that WAN optimisation is far from dead, and such services can play a key part in improving the performance of cloud-hosted applications where latency is the underlying issue," he noted.

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“While most SD-WAN and SASE vendors will advertise WAN Op capabilities, such claims should not be taken at face value as the scale and depth of application optimisation can vary greatly. The general consensus is that SASE...is able to extend beyond the physical limits of the network. There is clearly confusion concerning the capabilities of SD-WAN, and how best to implement the technology.

“SD-WAN, while delivering undeniable value, has not managed to serve the entire needs of all organisations during the work-from-home directive. Covid-19 presents an enormous and evolving challenge as we look to return to a ‘new normal’ way of working, with many employees continuing to operate from home.”



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## SD-WAN goes mainstream in remote work surge but network visibility, security are concerns

Joe O'Halloran, Networking editor

Relentless technological advances and “tremendous” disruption from the Covid-19 pandemic have driven IT teams to require better visibility into the network, says research from Viavi Solutions.

The latest *State of the network* study from the global provider of network test, monitoring and assurance systems drew insights about network trends and challenges faced by IT teams. Results were compiled from more than 400 respondents, including network engineers, IT directors, security engineers and CIOs from around the world.

In what it said was now an [age of dynamic disruption](#), the study highlighted the fact that IT is increasingly challenged to maintain optimal service delivery, while implementing remote working on an unprecedented scale.

For the first time in 13 years of the *State of the network* study, the top challenge for troubleshooting applications was the ability to understand end-user



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experience, indicated by 47% of respondents, while nearly 60% cited the need for greater visibility into remote user experiences.

Viavi noted that [SD-WAN deployment](#), application troubleshooting, security monitoring and remediation all rely on comprehensive network visibility to be most effective. Among organisations of all sizes, the most used key performance indicator (KPI) for assessing end-user experience is packet-based metrics (45%), followed closely by user-satisfaction metrics (41%).

The survey also confirmed that the trend for the last year or so for [increased SD-WAN adoption](#) has gone mainstream, with the primary motivations for deployment being cost savings (58%) and business continuity (50%). Also, 45% of respondents noted visibility into end-to-end network and application performance, 38% indicated the ability to achieve improved WAN and application performance, and 37% said cloud-based applications such as Microsoft Office 365. The next most popular motivation scored only 15%, with those respondents indicating migration to an application-centric architecture and centrally managed branch sites.

For larger enterprises, visibility into end-to-end network and application performance were the biggest motivators, while for medium to large businesses, SD-WAN adoption leapt to 85%. Also, more than half of those that have, or plan to have, SD-WANs in place use multiple suppliers to do so.

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Most organisations, 58%, were found to be planning to manage SD-WAN visibility by using only their supplier's native capabilities. Half of the sample said they would use third-party monitoring tools, while 34% indicated they would go along the road of customised and in-house-developed tools.

Another standout finding of the study was that as enterprises increased connectivity, networks were even more exposed to vulnerabilities. Nearly three-quarters (73%) of respondents said security professionals need comprehensive visibility into network infrastructure to enhance cyber security efforts and speed remediation.

Making the need to beef up security even more pressing was the fact that more than half of respondents (54%) have already deployed internet of things (IoT) devices, while 24% of respondents plan to do so in the next 12 months. However, only 57% of them had a mechanism in place to monitor those devices.

About three-quarters of respondents agreed or strongly agreed that SecOps teams need better visibility into network infrastructure to enhance cyber security efforts, suggesting that effective collaboration between NetOps and SecOps leads to stronger security posture and faster incident response.

“As remote working becomes the new norm, IT teams are challenged to find and adapt technologies, such as flow-based reporting to manage bandwidth consumption, VPN [virtual private network] oversubscription and troubleshooting

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applications,” said Charles Thompson, senior director, enterprise and cloud at Viavi.

“To guarantee the best performance and reduce cyber security threats, increasing network visibility is now a must for all businesses. By empowering NetOps, as well as application and security teams with network visibility, IT can mitigate the impact of disruptive migrations, incidents and new technologies like SD-WAN to achieve consistent operational excellence.

“This year’s *State of the network* study clearly demonstrates an increasing awareness of this fact among all IT stakeholders.”

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## Infovista claims SD-WAN implementation game changer with transparent hybrid technology

Joe O'Halloran, Networking editor

Aiming to encourage enterprises that may previously have been discouraged to adopt software-defined wide area networking (SD-WAN) by the potential complexity and return on investment timescales, SD-WAN technology provider Infovista has unveiled technology that it says significantly reduces the typical implementation time for SD-WAN while eliminating the need for network reconfiguration and downtime.

The transition to SD-WAN has been one of the key trends of the past two years and [research from Omdia](#) calculated that the global SD-WAN market grew by 78% in 2019 year-over-year to reach \$1.9bn. Yet while it said there was clear evidence that SD-WAN adoption is growing rapidly, there is also a definite market need for a hybrid WAN solution that's easy to deploy to help customers move at their own speed and reduce disruption.

“As the market continues its shift from early adopters to the mainstream, there is room for a more methodical approach to migrate to SD-WAN via hybrid with the ability to respond and adapt to changing network and business conditions to

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deliver the highest quality of experience to application users,” said Cliff Grossner, a senior research director responsible for datacentre compute and networking, cloud services and SDN research at Omdia.

Noting these dynamics, and market value, Infovista has announced the addition of transparent hybrid WAN (THW) capabilities to its Ipanema SD-WAN offering. The company said unlike any other similar solution, its product when in THW mode can deliver all the benefits of SD-WAN without expensive changes to switching or routing hardware with seamless compatibility across all leading CPE suppliers.

Based on a [proprietary Infovista technology](#) that allows SD-WAN-based routing over internet connections that is “invisible” to currently deployed routers, transparent hybrid WAN is also said to help enterprise customers gain immediate business value from SD-WAN without the inherent risks of multi-month migration projects.

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**“For adoption of SD-WAN to deliver ROI, it needs to be simple to deploy, risk-free and easy to scale, with no ‘downside’ for enterprises and service providers. Transparent hybrid WAN is a real game changer for our industry”**

### Mike Wilkinson, Infovista

As a result, said Infovista, retailers, manufacturers and financial services organisations could see tangible return on investment (ROI) from digital transformation initiatives in stores, production facilities and branches in a fraction of the time needed with competing solutions, while minimising operational disruption.

“We recognise that for adoption of software-defined wide area networking to deliver ROI, it needs to be **simple to deploy, risk-free and easy to scale**, with no ‘downside’ for enterprises and service providers,” said Infovista chief product officer Mike Wilkinson. “Transparent hybrid WAN...is a real game changer for our industry.”

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To further his case, Wilkinson highlighted a recent deployment with a large international manufacturing customer that deployed 90 sites across four continents. Implementing the Ipanema SD-WAN solution went from decision to roll-out in just a few months.

“[In a legacy SD-WAN roll-out](#), there could be tens of thousands of configuration changes and potential risk of downtime,” he said. “The transparent hybrid capability of Ipanema SD-WAN meant zero changes to the router estate and, more critically, no disruption to business operations and no application downtime.”

The transparent hybrid WAN technology also comes with a revised pricing model, designed to encourage enterprises that may previously been discouraged by the [potential complexity and ROI timescales of SD-WAN to think again](#), Wilkinson added.



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## IT Priorities 2020: SD-WAN soars as collaboration and communications no longer on back burner

Joe O'Halloran, Networking editor

For IT professionals, it could well be that 2020 was the year of three months. As regards networking and communications, up until the end of March 2020, there seemed to be a consensus on how the year would pan out, with firms increasingly investigating how they could best [take advantage of 5G networks](#), how access to [full-fibre networks](#) could improve the business and whether [Wi-Fi 6](#) was appropriate.

There were, of course, remote conferencing and collaboration tools available, but these were, as they had been for a while, not much of a priority. There was a need for them, but not a pressing one. How far away those days seem now.

[The outbreak of Covid-19 has changed everything](#) and, in terms of networking, has turned everything upside down. [Remote conferencing and collaboration are now, without any exaggeration, business necessities](#) and, as witnessed by the recent [takeover of BlueJeans Networks by Verizon](#), is just as important to the supplier community as it is to users.

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By contrast, the 5G industry is suffering from a number of blows. Its prospects are particularly vulnerable in countries that have undertaken lockdowns for indefinite periods to prevent the spread of the coronavirus and [which are likely to see severe economic slowdowns for which 5G will be an expensive luxury not a necessity](#).

## Changing priorities

So, the world has changed immeasurably. But perhaps to get a fuller picture as to how Covid-19 is going to hit the networking and communications industry, and its subsequent knock-on effect for networking professionals, it is necessary to know what was on professionals' agendas as 2020 began. And the *2020 Computer Weekly/TechTarget IT Priorities* survey revealed exactly what these priorities were.

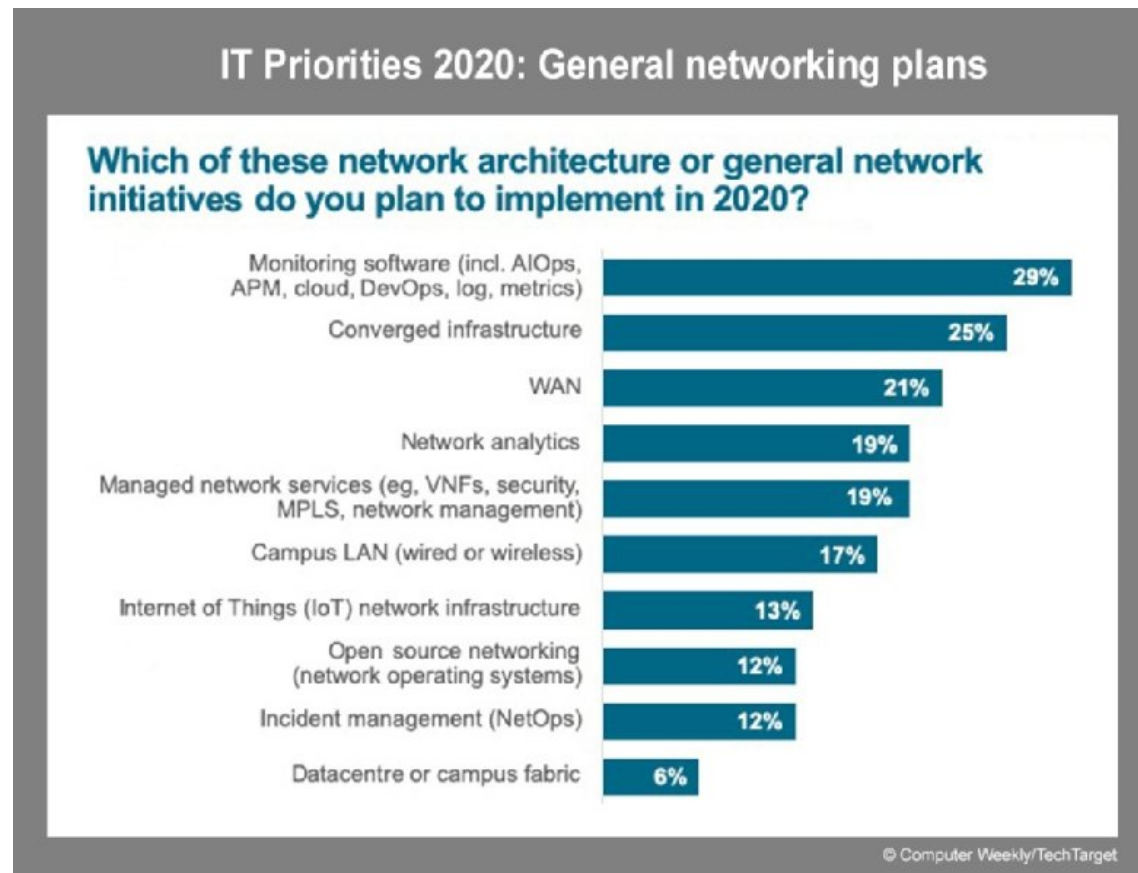
Overall, the global research surveyed the opinion of UK and Irish IT professionals across 10 main industries, namely financial services, telecoms, hospital and healthcare, government administration, retail, manufacturing/industrials, business services, managed service providers and management consulting. Just over two-fifths of these firms (44%) had 1-99 employees; 22%, 100-999; 14%, 1,000-9,999; and 20% more than 10,000.

The research found that while companies' budgets for IT were softening overall – 39% said that they were going to be spending more money, representing a 28

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percentage point fall compared with the start of 2019 – they were moving towards a number of key areas, including networking. Indeed, the survey found that networking was getting what the researchers called “a good dose” of new, and users redirected spending into connectivity and connectivity management.



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End user computing was found to be collinear with digital transformation, and mobile enablement was a big deal in modernisation. And in what may be the biggest change since the coronavirus struck, managed services interest was widespread and heating up.

When asked which initiatives would most impact their organisation's 2020 technology spending, networking was chosen by 36% of respondents, 1% above cyber security or risk management and second only to cloud infrastructure deployment, which was cited by 41%. In terms of which best described the elements within users' IT environment that they planned to monitor, the top element was network traffic/data flow, indicated by 54%. This was followed by identity and access control, and user behaviour, with 51% and 46% respectively.

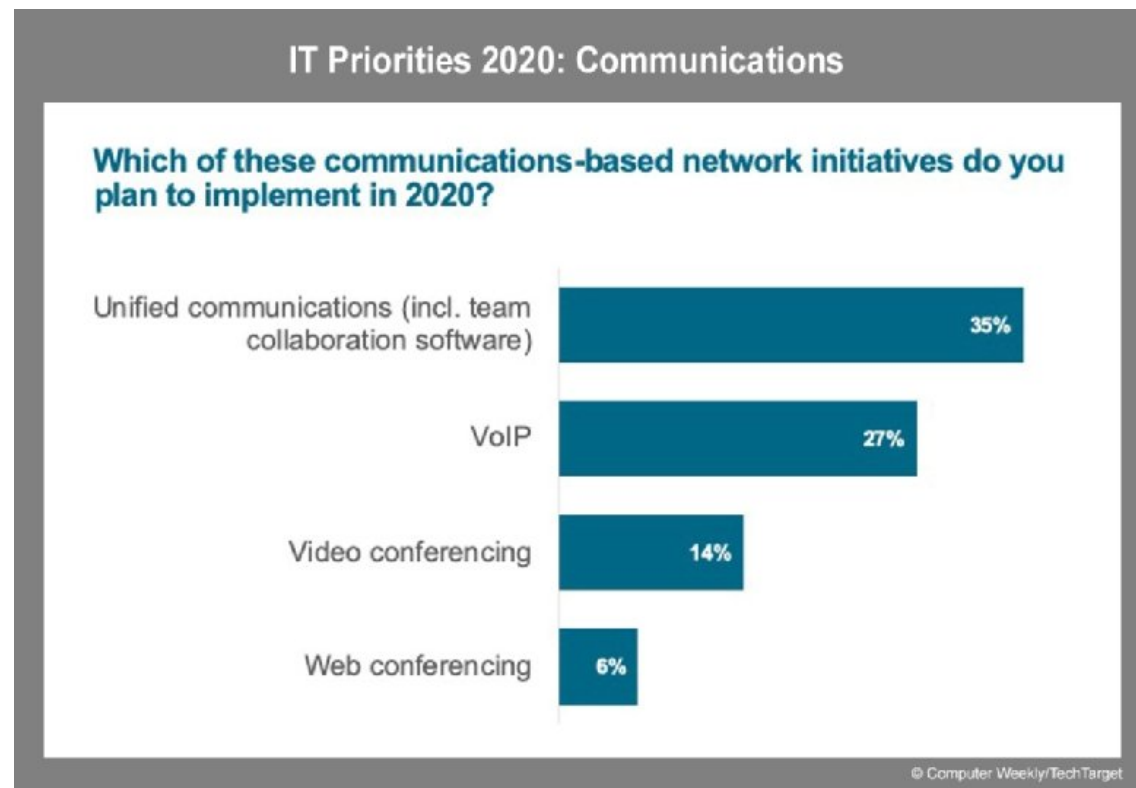
Yet when it came to which network-based initiatives that they planned to implement in 2020, monitoring software was cited as the most important by 29% of users, followed by converged architectures for 25% and wide area networks (WAN) for 21%. Campus LAN, an increasingly growing subset of the industry at the beginning of the year and an area of great interest for companies such as Cisco and Aryaka, was indicated as a top priority by 17%.

[Wi-Fi 6 \(802.11 ax\) was one of the technology stories of 2019](#) and when professionals were asked which connectivity or access-based network initiatives were on their agenda to implement in 2020, it was only beaten by IP address management and monitoring (DHCP/DHCP), cited by 39% and 37% respectively.

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Upgrading WLANs, such as upgrading access points and upgrading cable to 2.5/5G, followed with 33%. Interestingly, upgrading and importing multicloud connectivity – something that firms have rushed to do as telework rocketed – was indicated by just 24%, while 5G was noted by just 5%.



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Virtual private networks (VPN) and network access control (NAC) as a networking initiative – that is supporting the ability, if not security, of remote working – was cited by nearly a third of those surveyed. While quite high in importance – fourth place – it would be interesting to see how much this has actually soared to in these days of remote working being the norm.

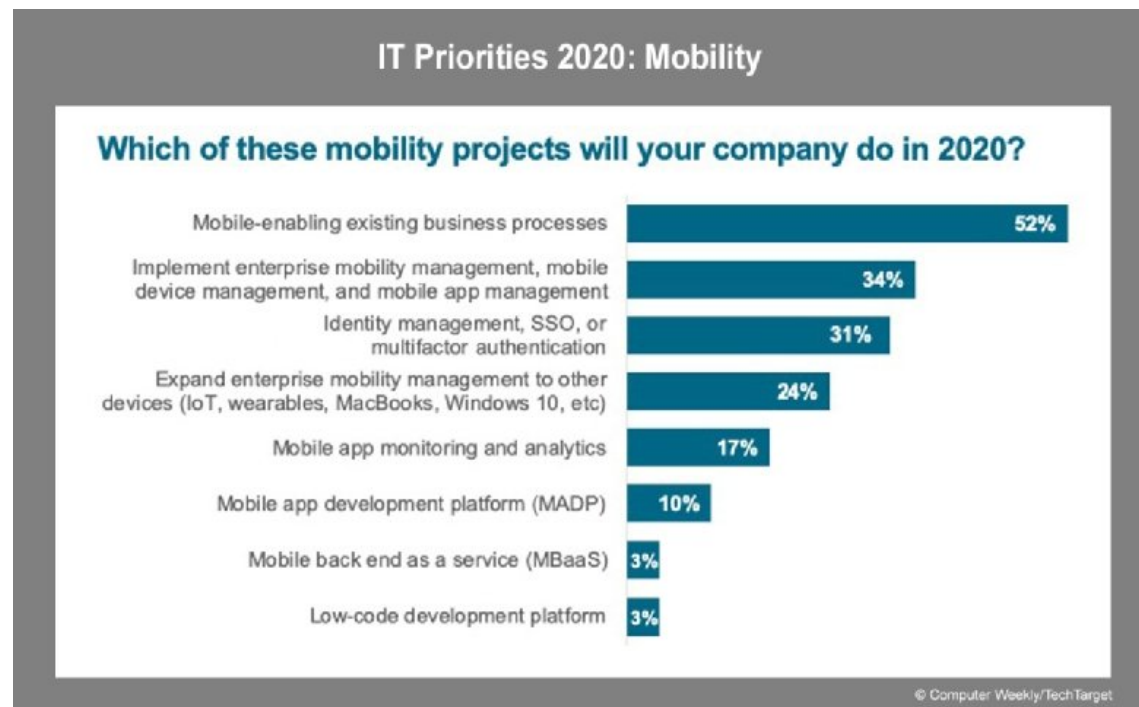
And what seems incredible now is that universal communications (UC) was spoken of as an industry with the possibility of terminal decline. Among the survey's top-line findings was the remark that "the imminent death of UC may be overstated". Very overstated from the vantage point of April/May 2020. The survey found that 35% planned to implement UC including team collaboration software – [this target was probably hit around the third week in March if not some time before](#) – and then VoIP (27%), video conferencing in general (14%) and web conferencing only getting 6%.

[Software-defined networking in a wide area network \(SD-WAN\) was another of the undisputed key trends of 2019](#), and huge things were predicted by industry analysts for its growth this year. The survey though noted that SD-WAN interest in the UK was, at the start of the year, not as strong as North America was showing. Just over a tenth (11%) of the survey said they would implement WAN edge infrastructure, with the same percentage saying they would deploy software-defined networking (SDN) in the datacentre and 9% SD-WAN per se and on edge routers.

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Despite there being plenty of opportunity for managed service providers (MSPs) and inter-cloud connectivity providers at the time the survey was conducted, the study found that just under three-fifths (57%) of surveyed firms were considering MSPs for any services.



VoIP (21% of respondents) was found to be the most popular area for a managed service, and 17% considers UC as an ideal candidate for such a



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service delivery, the same as for managed network services. Video conferencing as a service was considered by just 5% of the sample.

## Upwardly mobile

So what about mobile? Well, again it can be said without doubt that mobility will end 2020 even more important than the industry professional thought it would be.

The essential issue was this: end user computing was found to be collinear with digital transformation, and mobile enablement was a big deal in business modernisation. The study revealed that there was a 63% year-on-year increase in UK and Irish companies looking to mobile-enable existing business processes.

When looking at how mobile would enable business processes and management in 2020, the survey found that 52% of respondents indicated that their business would look at mobile enabling existing business processes and 34% said they would focus on implementing enterprise mobility.

Addressing security issues for mobile was a top priority for 31%, and the next most popular, for 24%, was expanding enterprise mobility to more devices, including the internet of things (IoT) and wearables.

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