SD-WAN for Addressing Branch Network Complexity & Security

A Global Survey of Network Professionals

November 2016
Executive Summary

This research finds that companies are struggling to manage and secure the WAN, especially at branch locations. Nearly all participants stated that maintaining security policies, network devices and controlling sensitive information is the most difficult aspect of managing the WAN. One out of three companies admitted to not even having proper security measures at each branch. Participants shared that this problem is aggravated by having numerous devices at each branch location from multiple vendors. Yet less than a quarter of those surveyed have a project to simplify and consolidate the branch network and security device sprawl.

A possible solution may in the form of software-defined WAN (SD-WAN) and security (SD-Security). Those surveyed indicate that SD-WAN provides the opportunity to integrate WAN and security into a single solution and reduce complexity. Participants also expect that a managed service approach could reduce tasks, costs and save resources.
Key Findings

- Over 1/3 of companies fail to have proper security measures at branch locations
- Growing complexity cited as top challenge for managing branch network security
- 80% prefer an integrated SD-WAN and security solution
- 97% state numerous challenges to managing the WAN
- 2 out 3 companies must manage more than six physical network and security devices at each branch location
- Nearly 6 out 10 companies would consider SD-WAN managed service offering
METHODOLOGY AND PARTICIPANTS
The primary research goal was to capture how companies managed and secured their network across branch locations. The research also investigated expected benefits and challenges of a software-defined WAN (SD-WAN).

Network professional users worldwide were invited to participate in a survey on the topic of managing and securing the WAN.

The survey was administered electronically and participants were offered a token compensation for their participation.

A total of 308 participants that have network responsibilities completed the global survey. Participants represented each of the five continents.
Companies Represented

- Industry
  - Financial Services: 16%
  - Technology: 16%
  - Healthcare: 8%
  - Manufacturing: 11%
  - Education: 7%
  - Government: 6%
  - Services: 4%
  - Retail: 4%
  - Energy and Utilities: 4%
  - Telecommunications: 3%
  - Media and Advertising: 3%
  - Transportation: 2%
  - Hospitality and Entertainment: 1%
  - Pharmaceutical: 1%
  - Food and Beverage: 1%
  - Manufacturing: 1%
  - Retail: 1%
  - Services: 1%
  - Government: 1%
  - Education: 1%
  - Non-Profit: 1%
  - Other: 4%

- Company Size
  - More than 10,000: 31%
  - 5000 -10,000: 22%
  - 1000-5000: 47%
  - Other: 0%

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Participant Demographics

**Role**
- Individual contributor: 27%
- Executive: 22%
- Team manager: 51%

**Responsibility**
- Working with the network is my entire job: 15%
- Working with the network is a substantial part of my job: 67%
- Working with the network is a minor part of my job: 18%
CORE FINDING 1: BRANCH COMPLEXITY = TOP ISSUE
In a typical branch location, how many physical network and security devices are used?

- Less than 3 devices: 7%
- 3 to 5 devices: 27%
- 6 to 10 devices: 22%
- More than 10 devices: 44%
In a typical branch location, how many different vendors' network and security solutions are installed?

- 12% work with 1 vendor
- 73% work with 2 to 5 vendors
- 15% work with more than 5 vendors
In your experience, what are the most challenging aspects of managing your company’s WAN?

Please select the top 3 challenges.

- Managing network and security devices at branch locations (52%)
- Mitigating information security risks at the branch locations (50%)
- Deploying new network and security solutions at branch locations (42%)
- Increasing costs due to the growing traffic volume over our MPLS network (42%)
- Amount of time it takes to bring up a new branch location (31%)
- Providing fast access to cloud applications (SaaS) (25%)
- Managing network and security devices at branch locations (25%)
- Mitigating information security risks at the branch locations (22%)
- Deploying new network and security solutions at branch locations (18%)
- Increasing costs due to the growing traffic volume over our MPLS network (18%)
- Amount of time it takes to bring up a new branch location (14%)
- Providing fast access to cloud applications (SaaS) (10%)
- There are no challenges to managing the WAN (3%)
- Other (2%)
Is there an initiative to reduce the number of network and security devices used in the branch office?

- Yes, we have an active project now (24%)
- Device reduction is a future project (38%)
- No, there are no device reduction projects planned (38%)
Would your company consider a managed SD-WAN service instead of deploying an enterprise product?

- Yes: 59%
- No: 24%
- I was not aware that managed SD-WAN services were available: 17%
What benefits would you expect from SD-WAN as a managed service?

Please select top 2 benefits.

- Service provider accountable for issues and troubleshooting (44%)
- Saving resources by not directly managing the WAN (41%)
- Leveraging service provider expertise (No need to learn another WAN technology) (38%)
- Service provider manages the additional security at the branch required with direct Internet access (37%)
- Service provider manages ISPs/broadband providers associated with SD-WAN (32%)
- Other (3%)
CORE FINDING 2: BRANCH SECURITY = ONGOING ISSUE
Which of the following are part of the branch security architecture today?

- Secure web gateway: 67%
- Intrusion protection (IPS): 66%
- Stateful firewall: 60%
- Next-generation firewall: 52%
- Other: 4%

Over 1/3 of Companies Fail to Have Proper Security Measures at Branch Locations
Growing Complexity Is Top Challenge for Managing Branch Security

Which of the following is the most challenging aspect of deploying security solutions in branch networks?

- Growing complexity of the network due to cloud based applications and mobile technology: 37%
- Difficulty managing security policies across network devices: 28%
- Insufficient IT personnel: 27%
- Lack of security expertise: 6%
- Other: 2%
Would it be valuable to have an SD-WAN solution that includes full-featured, certified network security capabilities?

80% Prefer an Integrated SD-WAN and Security Solution

Yes, we prefer integrated solutions 80%

No, we want dedicated security solutions 20%
About Dimensional Research

Dimensional Research provides practical marketing research to help technology companies make smarter business decisions. Our researchers are experts in technology and understand how corporate IT organizations operate. Our qualitative research services deliver a clear understanding of customer and market dynamics.

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About Versa Networks

Founded by network industry veterans, Versa Networks is an innovative vendor of software-defined WAN (SD-WAN) and security (SD-Security). Versa provides a unique and carrier-grade SD-WAN and SD-Security solution that is purely software- and NFV-based, and fully multi-tenant. The solution provides a wide range of virtualized networking and security functions that can be used to create highly scalable and high-value managed services that run on low-cost white box and x86 hardware. Versa SD-WAN and SD-Security are deployed by Tier 1 and 2 providers around the world, as well as several large enterprises. The company is backed by premier venture investors Sequoia, Mayfield, and Verizon Ventures.