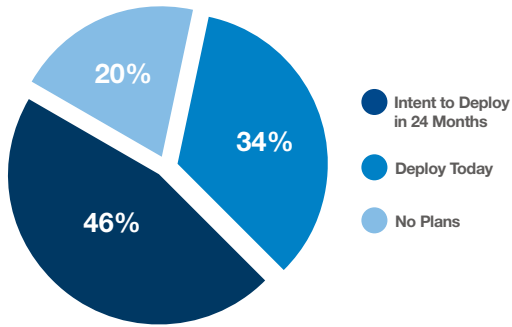


SD-WAN Adoption

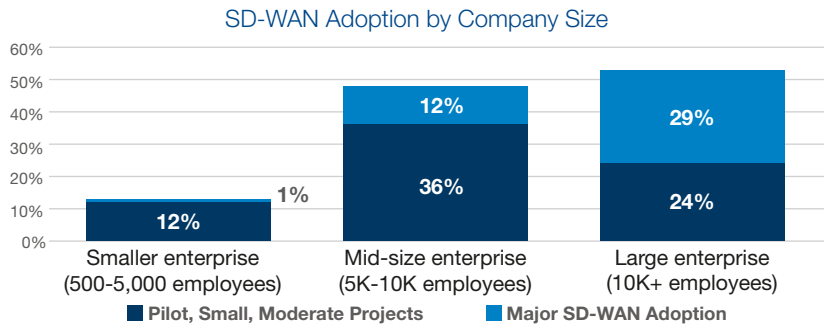
Overall SD-WAN adoption

Recent survey shows 34% of customers have deployed SD-WAN and 46% of customers plan to deploy SD-WAN in the next two years.



Market segment adoption

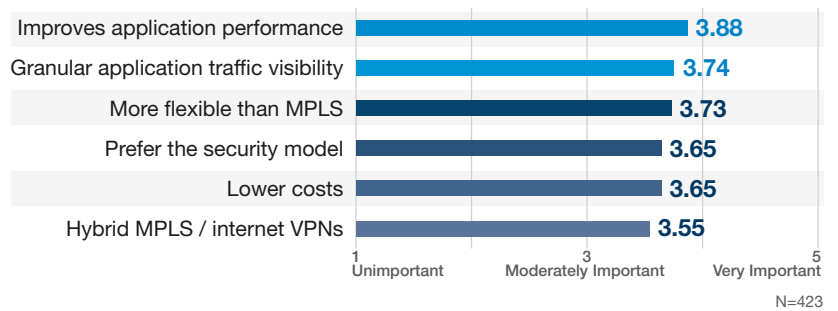
Larger enterprise customers are much more likely to have experience with SD-WAN, and to have major deployments to date. Global companies are more likely to have adopted SD-WAN but Ovum sees growing interest in the mid-market segment.



Enterprise Value Of SD-WAN

- Applications performance and visibility take top spots in enterprise perceptions of SD-WAN, followed by flexibility.
- SD-WAN's perceived cost savings had lower priority, but (like SD-WAN security) is an important component of the solution. Cost has moved down in value over the past two years.
- Ovum similarly finds IT managers increasingly think about the network in terms of applications management

Perceived Enterprise Value of SD-WAN Features*

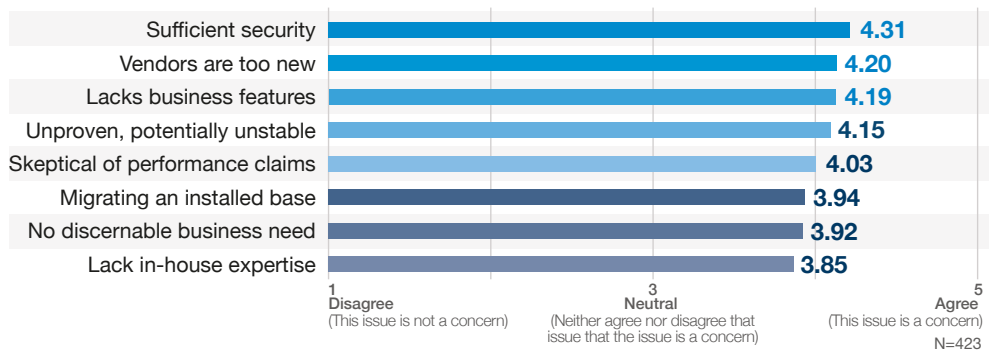


Concerns About SD-WAN Deployment

Five Major Concerns

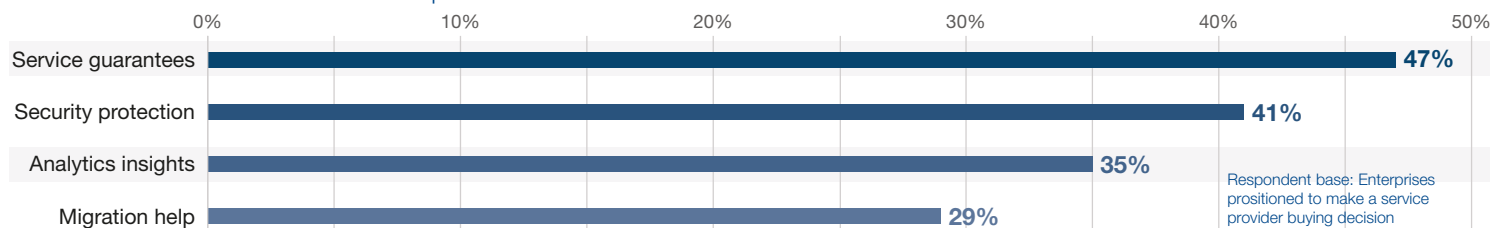
- Sufficient security
- Vendors are too new
- Lacks business features
- Unproven, potentially unstable
- Skeptical of performance claims

Top Enterprise SD-WAN Concerns**



Top Reasons To Choose A Network Service Provider For SD-WAN

Top Reasons To Choose A Service Provider For SD-WAN***



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