2020 and 2021 defined the importance for transformation change for the enterprise. Today, ongoing market and economic disruption are top of mind

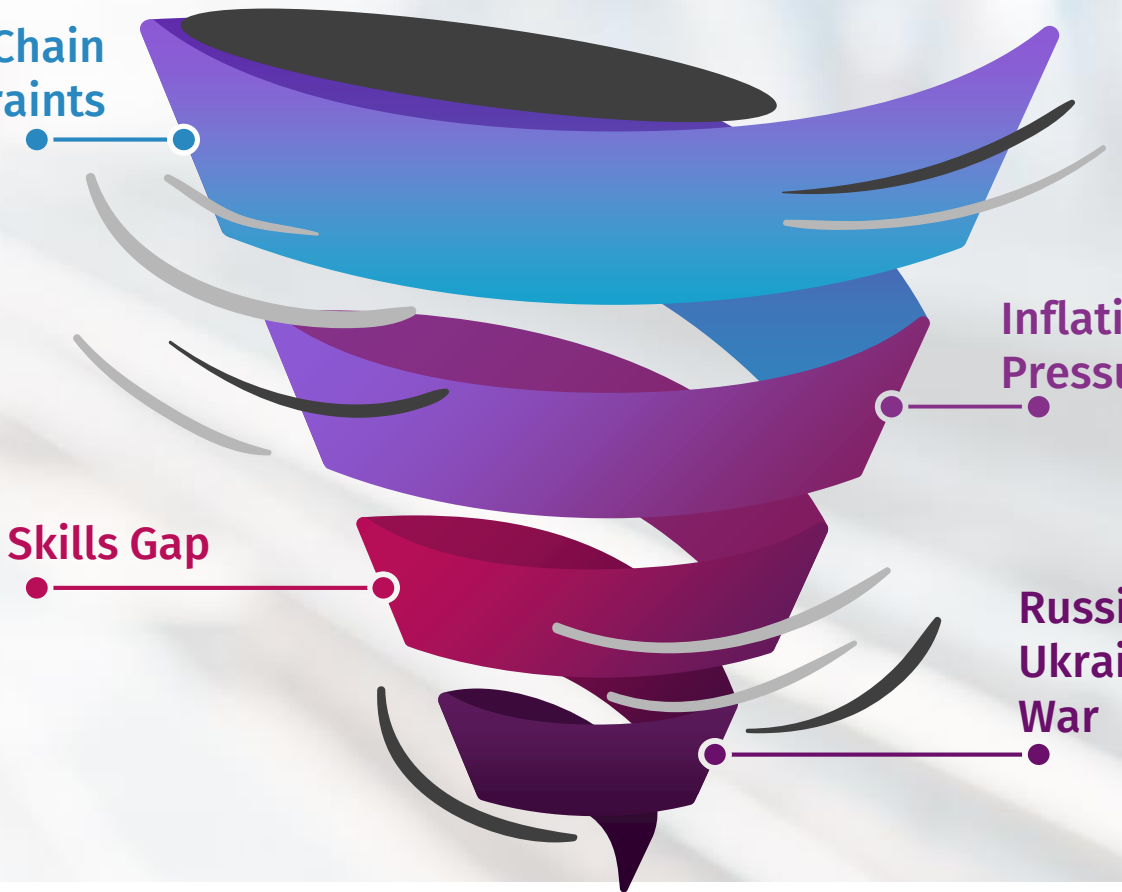**Accelerated** digital transformation

Adapted to new work models

Transformed connectivity priorities, policies and processes
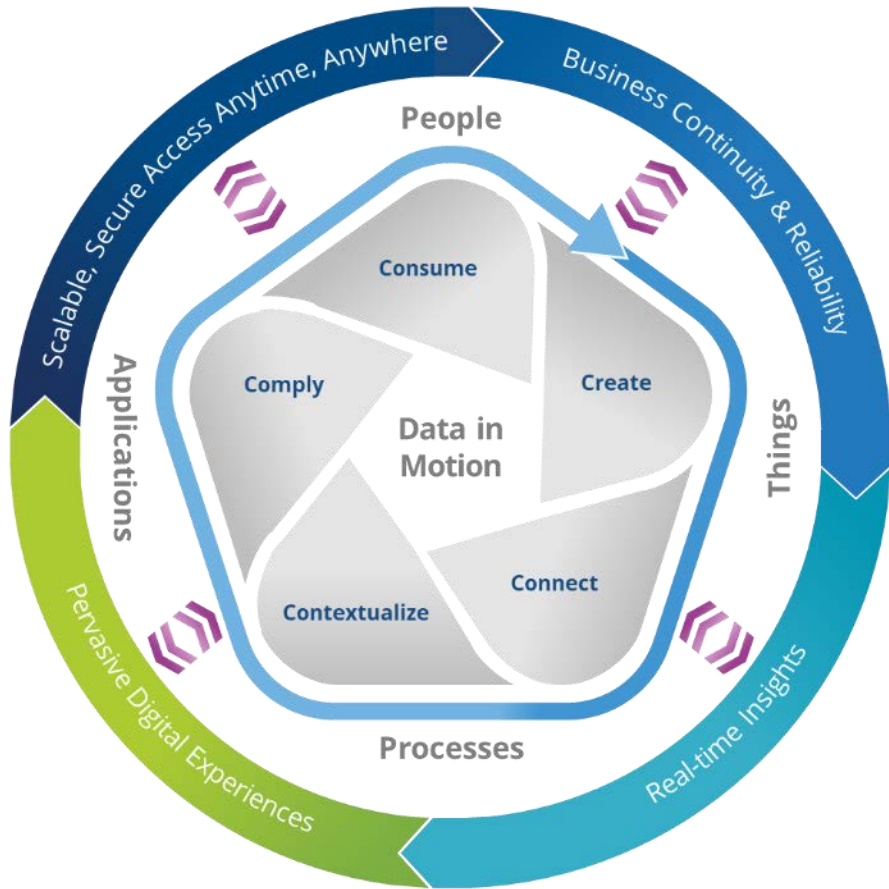
Supply Chain Constraints

Inflationary Pressure

Skills Gap

Russia-Ukraine War

*To prepare for novel business disruptions, organizations need plans that enable them to **stay connected** and **adapt not just respond.***

The Future of Connectedness framework becomes a central driver of business resiliency and agility

Scalable, Secure Access Anytime, Anywhere

- Always on high performance networks provide guaranteed connections and bandwidth
- Adaptable to market conditions, enable smart, real-time data-driven decisions

Business Continuity and Reliability

- Network redundancy guarantees connectivity and alleviates scale issues
- Ability to stay connected during crisis to deliver on SLAs, maintain business

Real-Time Insights

- Allowing insights to be reviewed/understood 24/7 or as needed by the business
- Understand the need to scale access depending on demands for data

Pervasive Digital Experiences

- Ensure sufficient coverage and capacity to deliver digital information, commerce, collaboration among employees, customers, partners

Over half of enterprises worldwide still lack a defined and implemented connectivity resiliency strategy

Which of the following best represents your organization's connectivity resiliency strategy?

Pie chart values: 5.4%, 30.8%, 18.1%, 16.7%, 29.0%
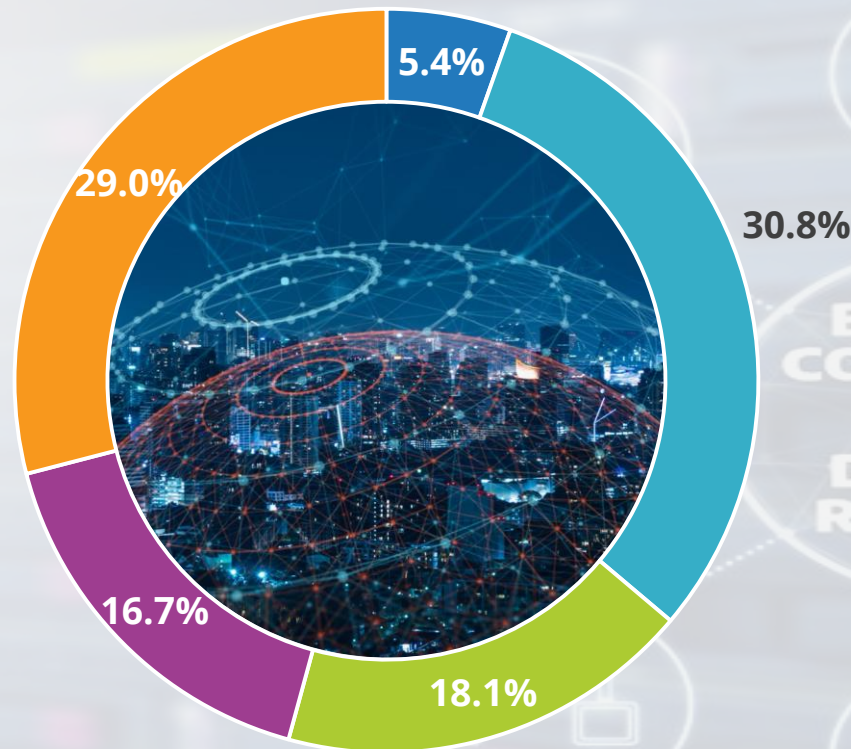
- No overarching strategy and hence, network outages create significant business disruption due to lack of failover capabilities.

- Organization has understanding and road map of networks, solutions, and tools to help ensure business continuity.
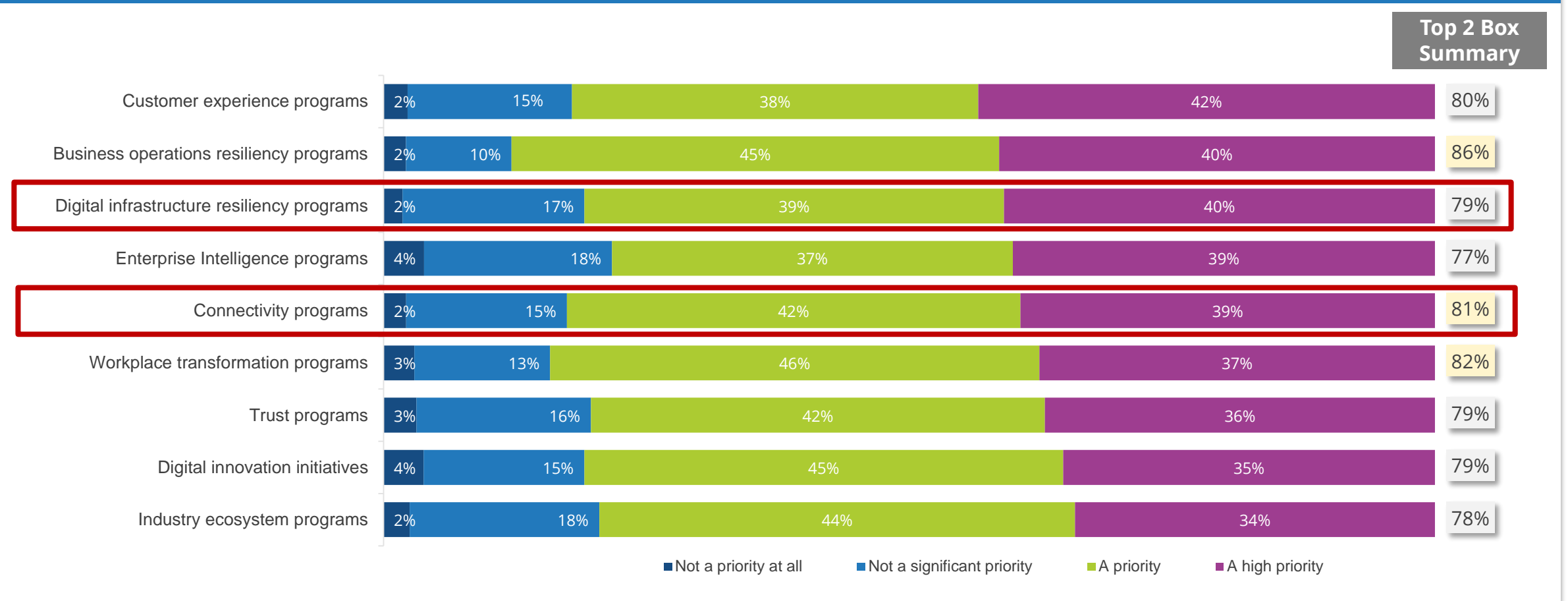
- Multiple networks are available for distributed workforce to access applications and data, but with limited integration or oversight.

- Resiliency strategy is defined, allowing for proactive management of unexpected network outages.

- Organization has robust automated connectivity resiliency strategy in place and is able to seamless recover without any business disruption.

Expect companies to invest heavily on automation/augmentation, as well as on workplace transformation and connectivity as these programs would help improve customer experience, operational resiliency, and overall productivity

As a result of the uncertainties related to geopolitical tensions, inflation, supply chain disruptions, and managing the ongoing COVID-19 pandemic, how much of a priority will investments in the following areas be for the rest of 2022 and 2023?

Program	Not a priority at all	Not a significant priority	A priority	A high priority	Top 2 Box Summary
Customer experience programs	2%	15%	38%	42%	80%
Business operations resiliency programs	2%	10%	45%	40%	86%
Digital infrastructure resiliency programs	2%	17%	39%	40%	79%
Enterprise Intelligence programs	4%	18%	37%	39%	77%
Connectivity programs	2%	15%	42%	39%	81%
Workplace transformation programs	3%	13%	46%	37%	82%
Trust programs	3%	16%	42%	36%	79%
Digital innovation initiatives	4%	15%	45%	35%	79%
Industry ecosystem programs	2%	18%	44%	34%	78%

65% of organizations recognize the need to simplify, unify and standardize dedicated (on-premises) and shared (public) cloud infrastructure management and security to improve resiliency and reduce operational costs

Unifying the way we manage and secure dedicated on-prem and public cloud infrastructure to improve digital business resiliency - To what degree are each of these a current priority for your organization?

Worldwide
- 65%
- 21%
- 14%

North America
- 61%
- 18%
- 22%

Europe
- 52%
- 31%
- 17%

AP
- 78%
- 16%
- 6%

- ■ Top priority corporate initiative / Important corporate initiative
- ■ Selective business unit or IT team level initiative
- ■ Not a priority / Unsure
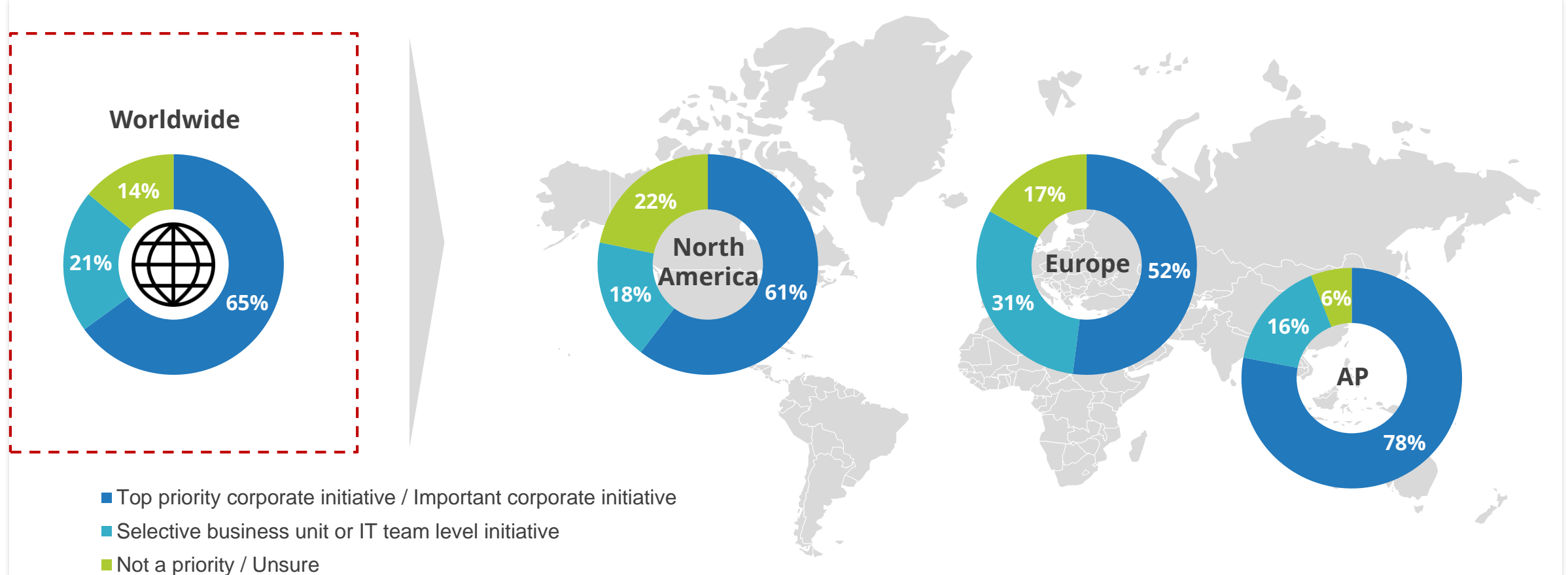
Cloud first migration, data intelligence and resiliency rank as top outcome driven priorities

Top 3 technology or business areas your organization will prioritize to improve business outcomes

Technology or business area	%
Adopt a cloud-first approach, extending existing cloud strategy	34%
Invest in tools/apps for employee productivity and collaboration	29%
Invest in tools for internal/external network insights	28%
Develop a zero-trust cybersecurity strategy	26%
Invest in end user/remote worker network infrastructure	25%
Adopt a connectivity resiliency strategy - redundant networks	24%
Adopt a wireless first approach for connectivity	24%
Prioritize 5G devices and applications across the enterprise.	24%
Invest in private networks (e.g., LTE,5G) to ensure network availability	24%
Invest in application visibility and performance management tools	22%
Supplement or pay for the cost of remote worker network connectivity	22%
Renegotiate key connectivity contracts with existing SPs to reduce costs.	18%

Source: IDC's *2022 Future of Connectedness Survey, August 2022 n=770*

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