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NETWORK AND CYBERSECURITY PRIORITIES 2023

A CXO PRIORITIES REPORT IN PARTNERSHIP WITH

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CONTENTS

INTRODUCTION

The rise in hybrid work and the adoption of cloud as a component of a Digital Transformation strategy have both had a marked impact on the risk landscape for organisations, and raised new questions around data protection and regulation.

Threat actors now use cloud as their primary delivery mechanism for malware, and compromised behaviour in the cloud further enables bad actors as data is left unsecured, easily shared and exfiltrated. Legacy security systems struggle to see the nuances of personal and professional cloud use; a challenge made harder when users are accessing documents from personal devices, in homes or public settings and unsecure networks.

In this challenging climate, organisations are turning away from traditional on-premises, perimeter-based security and looking at cloud native, edge alternatives. This shift allows organisations to accommodate the complexity of the modern environment, embrace hybrid workplaces and protect people, devices, apps and data, wherever they're located.

As cyberthreats and data protection requirements both continue to increase, it will be critical for organisations to ensure greater protection alongside smoother experiences for their users. Experts agree that this is best achieved through a Zero Trust architecture, providing access to both cloud and on-premises data and ensuring the right users have access to appropriate resources.

Survey overview

To find out more about the current security and network access challenges facing organisations in the Middle East, we surveyed CIOs, CTOs and IT directors about their experiences and future plans with regards to remote working and cybersecurity. This report aims to present an overview of the current evolution of remote working and enterprise-level security, exploring the challenges of a remote workforce and revealing how organisations plan to prioritise and invest in Zero Trust solution providers.

Through this survey, we aimed to discover

- Challenges with cybersecurity when managing a remote workforce
- Priorities and plans for SASE, Zero Trust and network transformation

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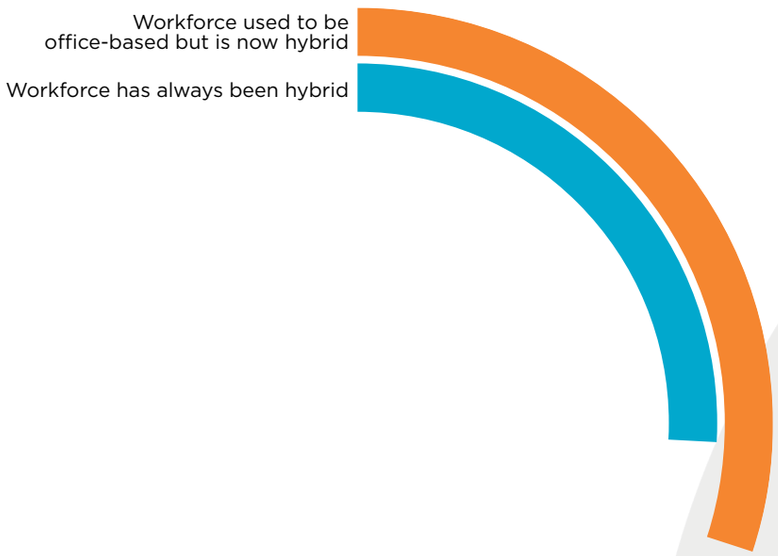
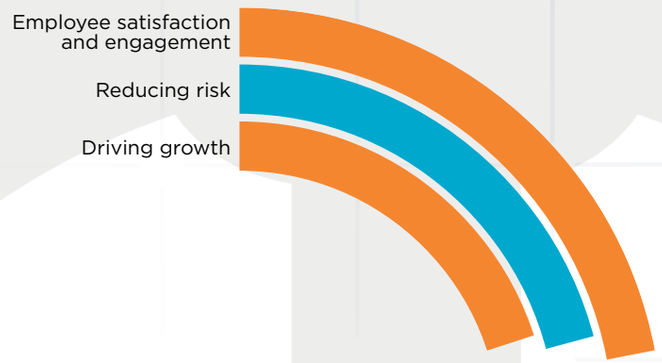
Summary of findings

1 and 2

- Nearly a third **(30%)** of the Middle Eastern organisations polled stated that their **workforce used to be office-based but is now hybrid**, with employees working remotely and from home, while **26%** claim their **workforce has always been hybrid**



- **Employee satisfaction and engagement (22%)** was cited as the top priority for organisations. This was closely followed by **reducing risk (21%)** and **driving growth (20%)**



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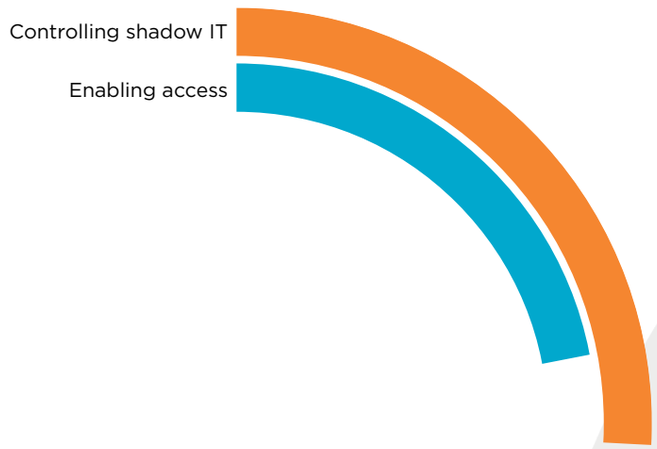
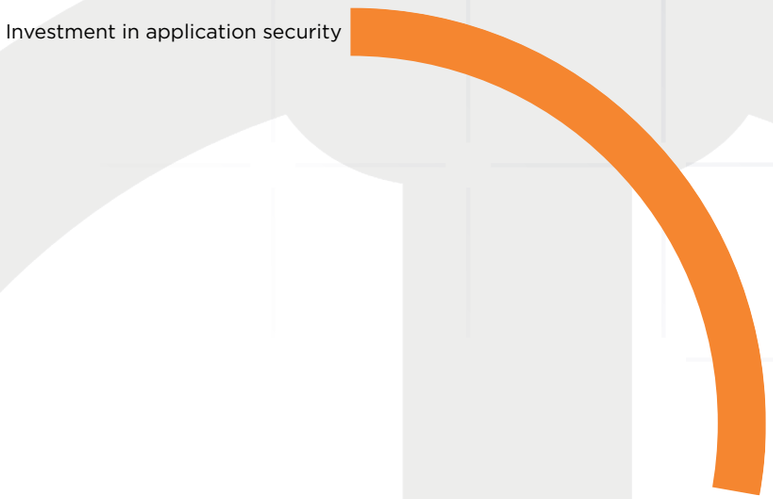
Summary of findings

3 and 4

- **Controlling shadow IT (26%)** and **enabling access (22%)** are two of the biggest challenges organisations face with remote and hybrid working



- With an increase in hybrid working, **28%** of respondents consider **investment in application security** to be the most important action to keep their networks safe



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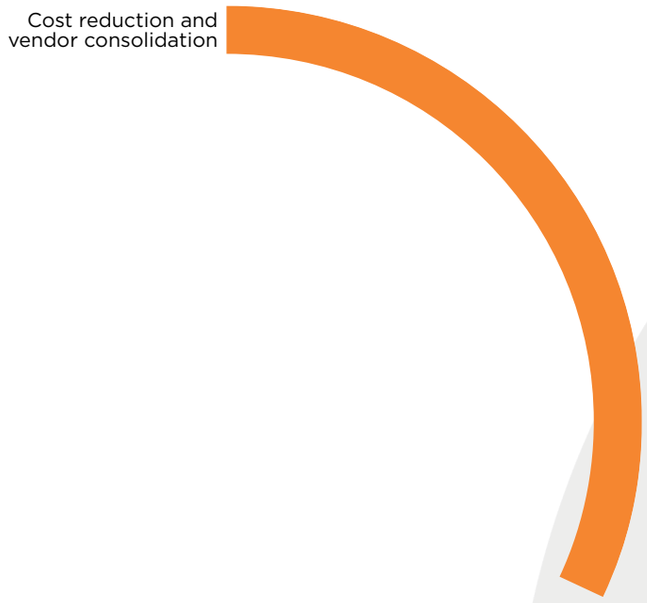
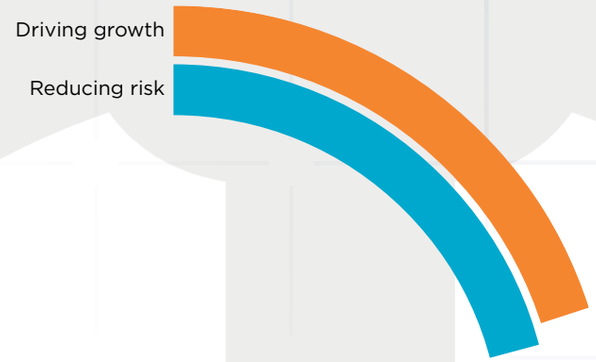
Summary of findings

5 and 6

- **Cost reduction and vendor consolidation (32%)** was highlighted as the most significant initiative that businesses have in the next three years where network transformation is a necessary part of their plan

- **Driving growth (20%)** and **reducing risk (21%)** are the top priorities when organisations invest in solid and reliable SASE solution providers





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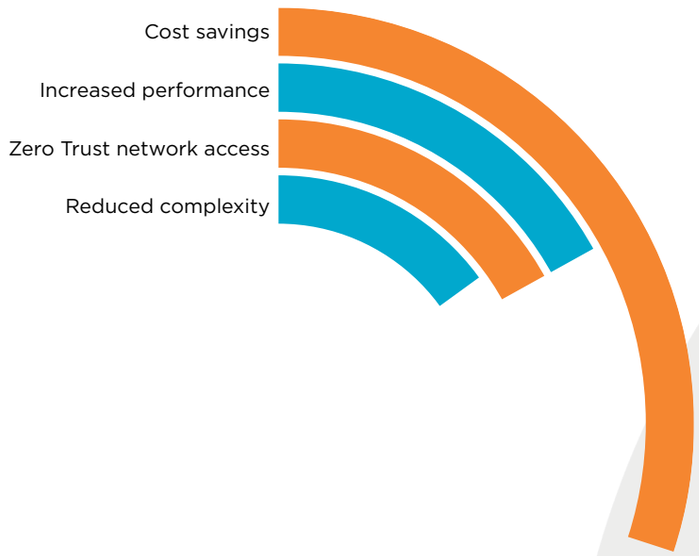
Summary of findings

- The primary benefits that organisations hope to drive from a SASE solution are; **cost savings (19%)**, **increased performance (17%)** and **Zero Trust network access (17%)** and **reduced complexity (15%)**



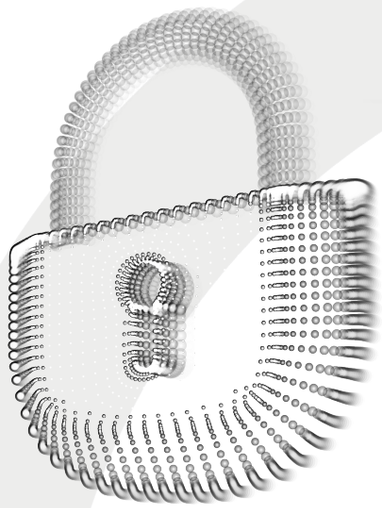
01

CHALLENGES WITH MANAGING A REMOTE WORKFORCE

One of the biggest impacts of the pandemic was the rapid mobilisation of a remote workforce.

Although many organisations may have operated a partial work from home model before, there is no doubt that every IT team still grapples with challenges such as onboarding, device security, workflow structure and building a more secure working space for employees – problems that grow with the size of the hybrid workforce.

In this section, we explore the working models of organisations alongside their network architecture choices to analyse the biggest challenges with remote and hybrid working.



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Key Takeaway

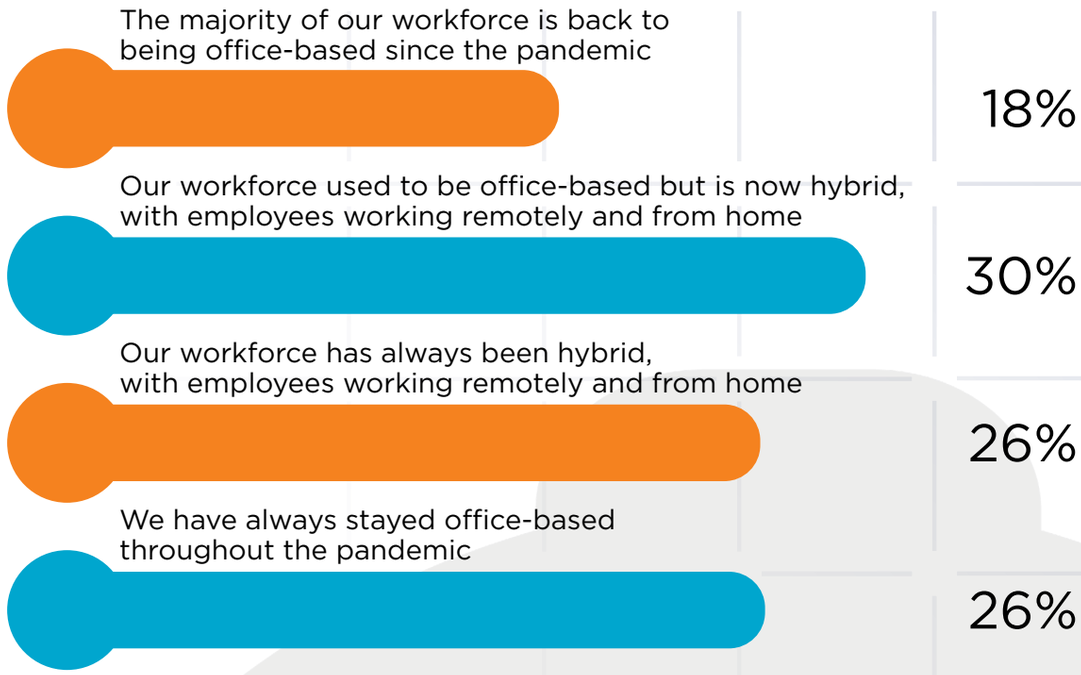
Almost two-thirds (56%) of Middle Eastern organisations surveyed have a hybrid workforce. Alongside access issues, for these organisations there are many security concerns to be addressed, specifically for the 30% which have only recently embraced the hybrid structure. Vendors need to recognise that these organisations will need extra support in navigating the cybersecurity risks and strategies unique to hybrid working in the coming years.

> Now the dust has settled on the events of the pandemic, organisations are looking beyond the interim access solutions they built quickly in 2020. Now is the time to take stock and determine not only what needs to be added to enable access, but also what can now be retired as it is no longer being used by office workers. Savings on costly MPLS lines – for instance – are easily found, and investments should instead be made on fit-for-purpose edge security, within the cloud and able to secure data, applications users and devices in their new locations.
>
> Rich Davis, Head of Solutions & Strategy, EMEA

QUESTION 1

WHICH OF THE FOLLOWING BEST DESCRIBES THE SITUATION IN YOUR ORGANISATION?

SELECT ONE.



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Key Takeaway

Enabling remote and hybrid work is about a balance between access and control, with 26% of respondents stating that controlling shadow IT was their biggest challenge, and 22% finding access enablement a greater struggle. Eighteen percent say balancing security and access requirements is their primary concern.

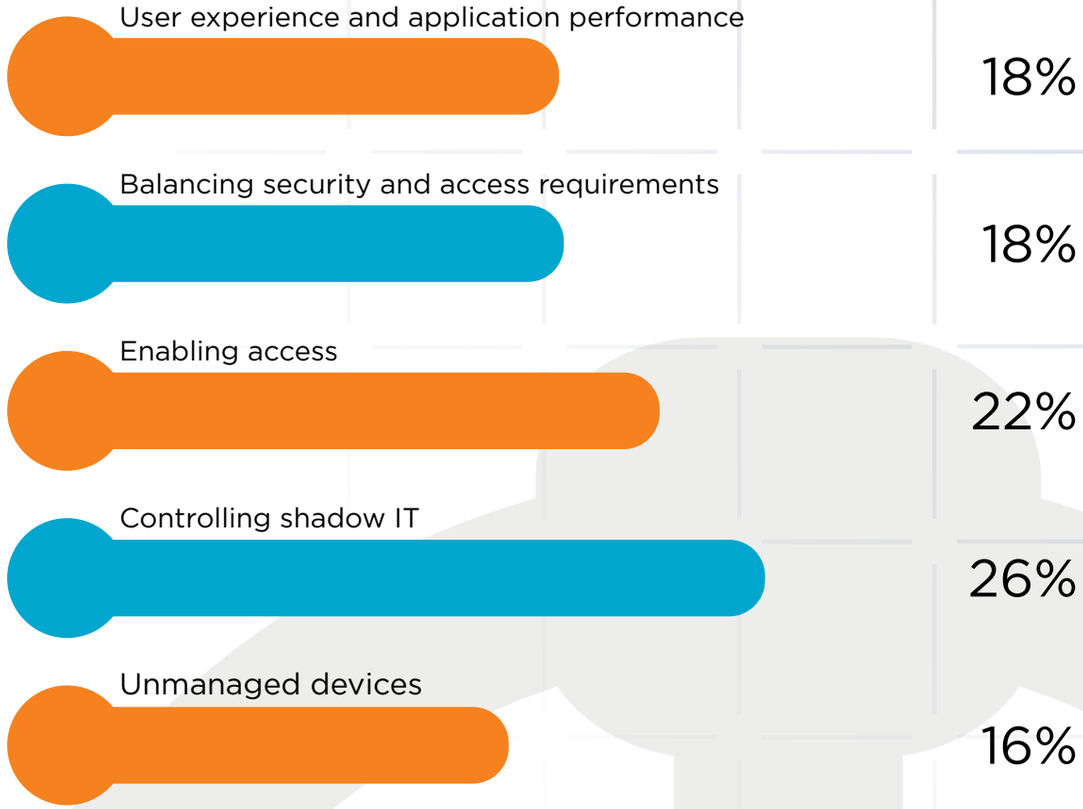
> For years, security and networking professionals have tried to walk a fine line at all times, finding acceptable trade-offs between security and user experience. You can see this perennial challenge looming large over projects to support hybrid work, but it really doesn't need to be a zero-sum game. Rethinking network and security architectures in an era of cloud enables increased security to actually positively impact upon user experience – a concept that seems completely counter-intuitive to the more experienced tech leaders.

Rich Davis, Head of Solutions & Strategy, EMEA

QUESTION 2

WHAT IS YOUR BIGGEST CHALLENGE WITH REMOTE/HYBRID WORKING?

SELECT ONE.



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Key Takeaway

The majority of Middle Eastern organisations (64%) are using a mix of on-premises and cloud network architecture, and only 6% are not yet using any cloud at all in their infrastructure.

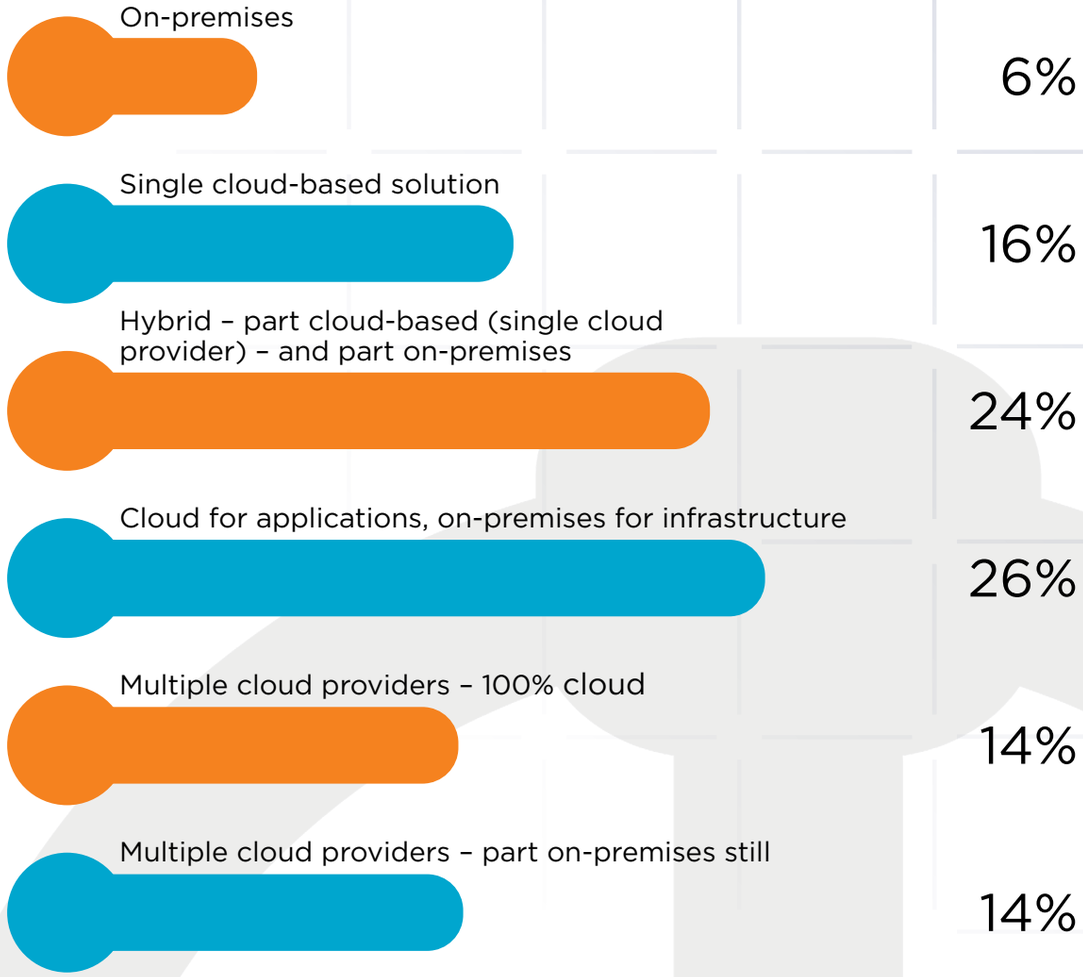
> Organisations are looking for something very different in their network architecture than they perhaps needed five years ago. SD-WAN is now established as an essential part of the network for hybrid access, and that has opened opportunities to become more creative in the way architectures are designed. The data here shows organisations are employing a range of approaches, but once they move beyond fully on-premises hardware, the opportunities to benefit from SASE and Zero Trust start to appear.

Steve Foster, Solutions Engineering Manager, MEA

QUESTION 3

WHICH OF THE FOLLOWING BEST DESCRIBES YOUR NETWORK ARCHITECTURE CURRENTLY?

SELECT ONE.



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Key Takeaway

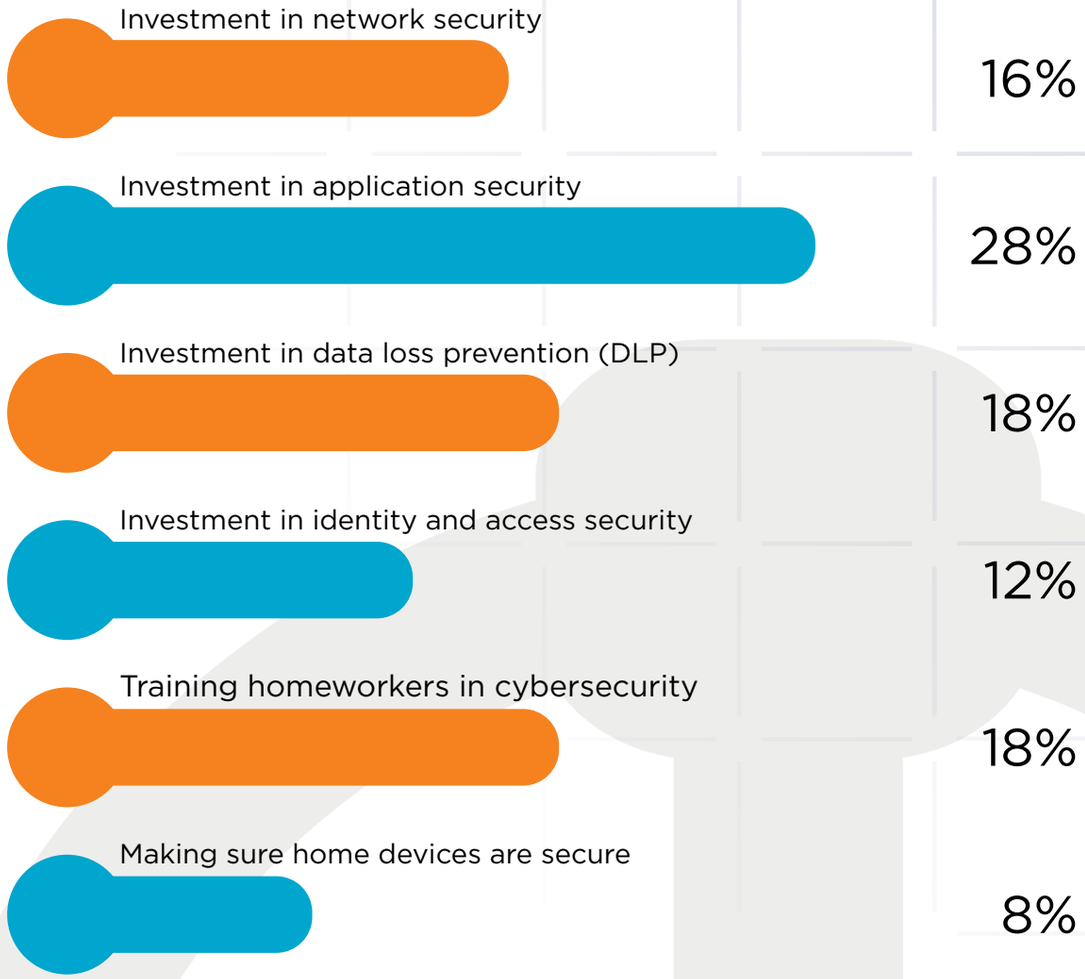
With an increase in hybrid working, most respondents (28%) consider investment in application security as the most important action to keep their networks safe. Data loss prevention (DLP) and cybersecurity training for homeworkers come in second place, with 18% each.

> Middle Eastern businesses are very astute in identifying that data and applications are the key battleground in today's security landscape. Our Netskope Threat Labs data shows that cloud applications are now the primary source of malware downloads, and we see that unsecured data and applications in the cloud are increasingly the cause of the data loss incidents we see reported around the world. Cloud, application and data security are key to cybersecurity in a hybrid working era.

Jonathan Mepsted, Vice President, MEA

QUESTION 4

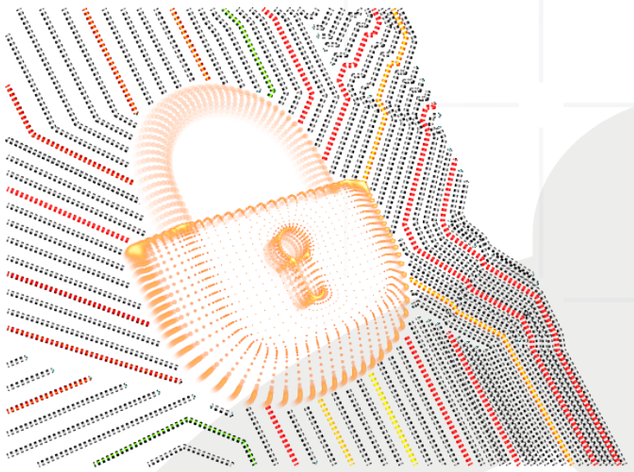
WITH AN INCREASE IN HYBRID WORKING, WHICH OF THESE IS MOST IMPORTANT TO YOU TO ENSURE YOUR NETWORK IS SAFE? SELECT ONE.



02

PRIORITIES AND PLANNING AHEAD

In this section, we look at the top considerations for organisations in the coming year and what their key priorities will be.



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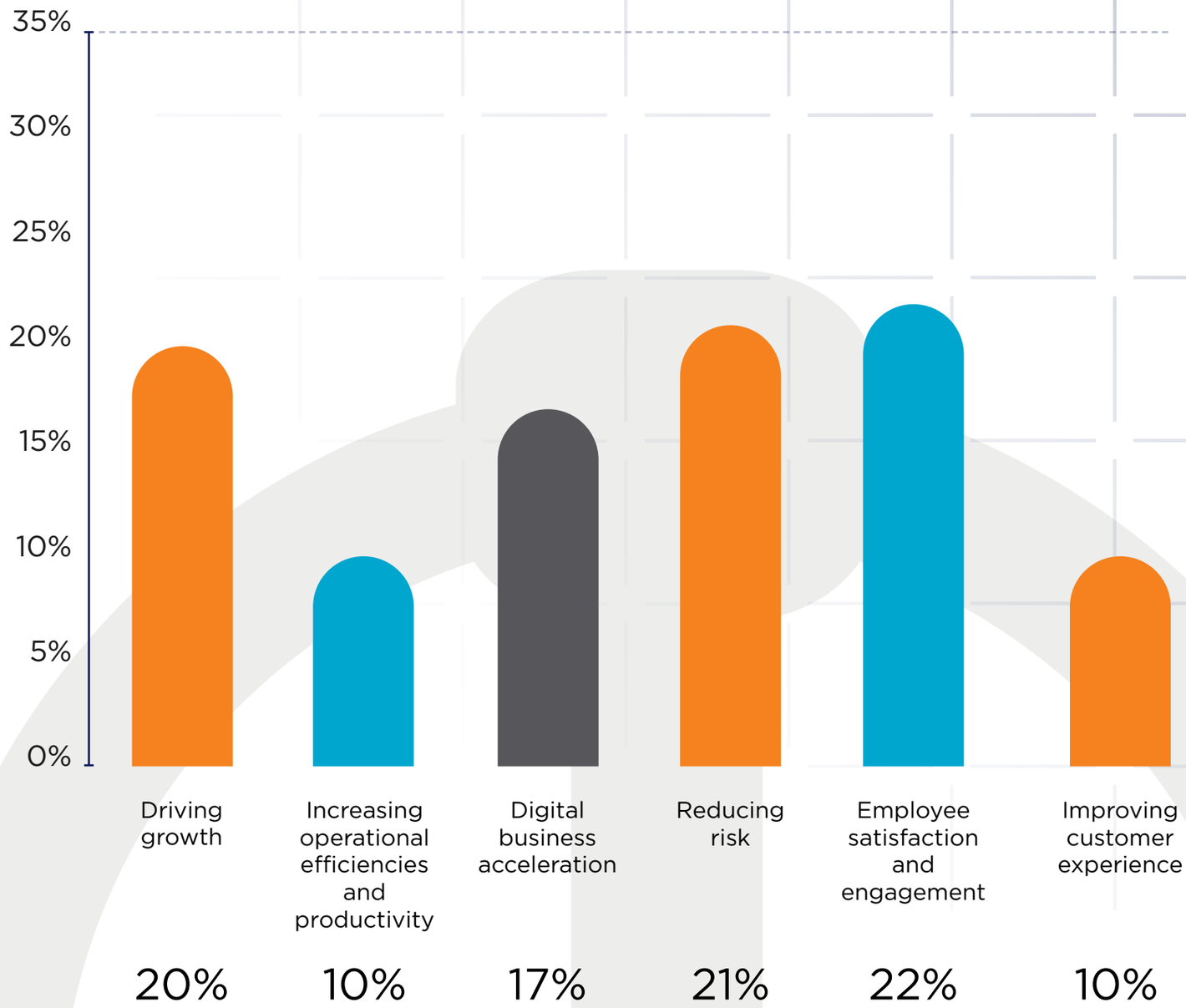
QUESTION 5

IN WHAT ORDER DOES YOUR ORGANISATION PLACE THESE PRIORITIES?

SELECT YOUR TOP TWO.



Key Takeaway

The research shows that IT decision-makers are heavily focused on the satisfaction of employees as their internal customer. However, it is unsurprising that risk reductions are very high security priorities for organisations. With the topic dominating board level discussions, risk reduction scored higher than driving growth for Middle Eastern organisations – a fascinating statistic indicative of a challenging economic landscape.

> Risk reduction – including cyber-risk – is firmly established as a board level discussion, and we know IT teams are being asked to regularly report on efforts and progress in this area. However, there is only one percentage point between that and employee satisfaction and engagement as a priority, and so it's no surprise that technology such as Security Access Services Edge (SASE) that helps balance these goals – which have in the past been seen as conflicting – would be of interest to IT buyers.

Rich Davis, Head of Solutions & Strategy, EMEA

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Key Takeaway

In today's economic climate, cost savings often top the list of objectives in IT projects and SASE is no different. Research respondents clearly see a range of benefits to transforming their security and networking estates. When evaluating the benefits of SASE, the respondents cited cost savings (19%) as their top priority. This was followed by increased performance (17%) and Zero Trust network access (17%), and reduced complexity (15%). There is a case here for a trusted Zero Trust provider which will produce solutions at comfortable price points, adding peace of mind to CIOs who value simplicity.

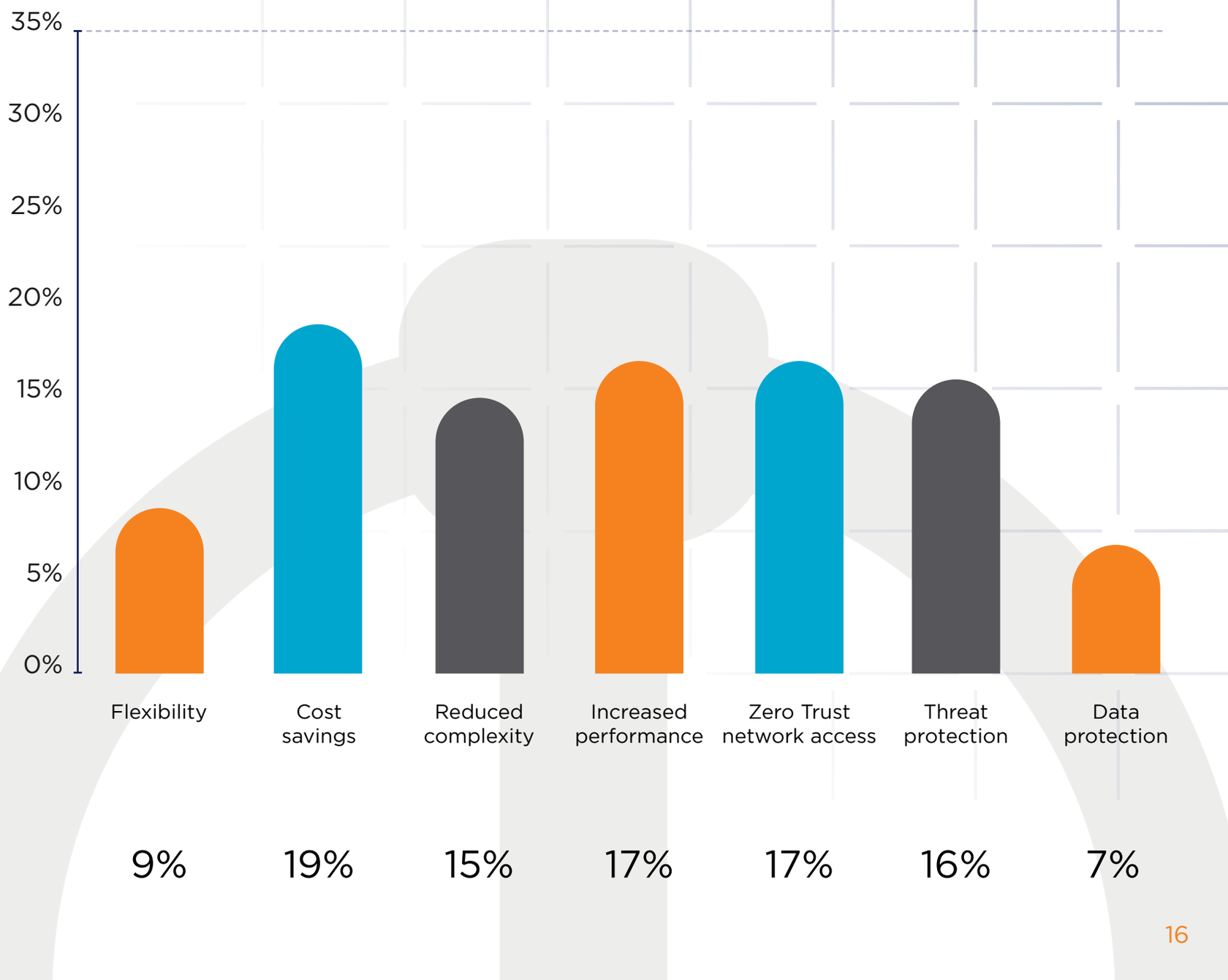
> SASE is a transformational approach to network and security, and the interest we see from organisations in the relatively short amount of time since the category was defined is testament to the many benefits it can bring. Cost savings are certainly there for the taking, but the strategic drivers on projects that we see tend to focus on the desire to improve security posture and improve performance in the modern IT estate.

Jonathan Mepsted, Vice President, MEA

QUESTION 6

THERE ARE MANY BENEFITS TO SECURE ACCESS SERVICE EDGE (SASE). IN ORDER, WHICH OF THESE IS THE MOST IMPORTANT TO YOU?

SELECT YOUR TOP THREE.



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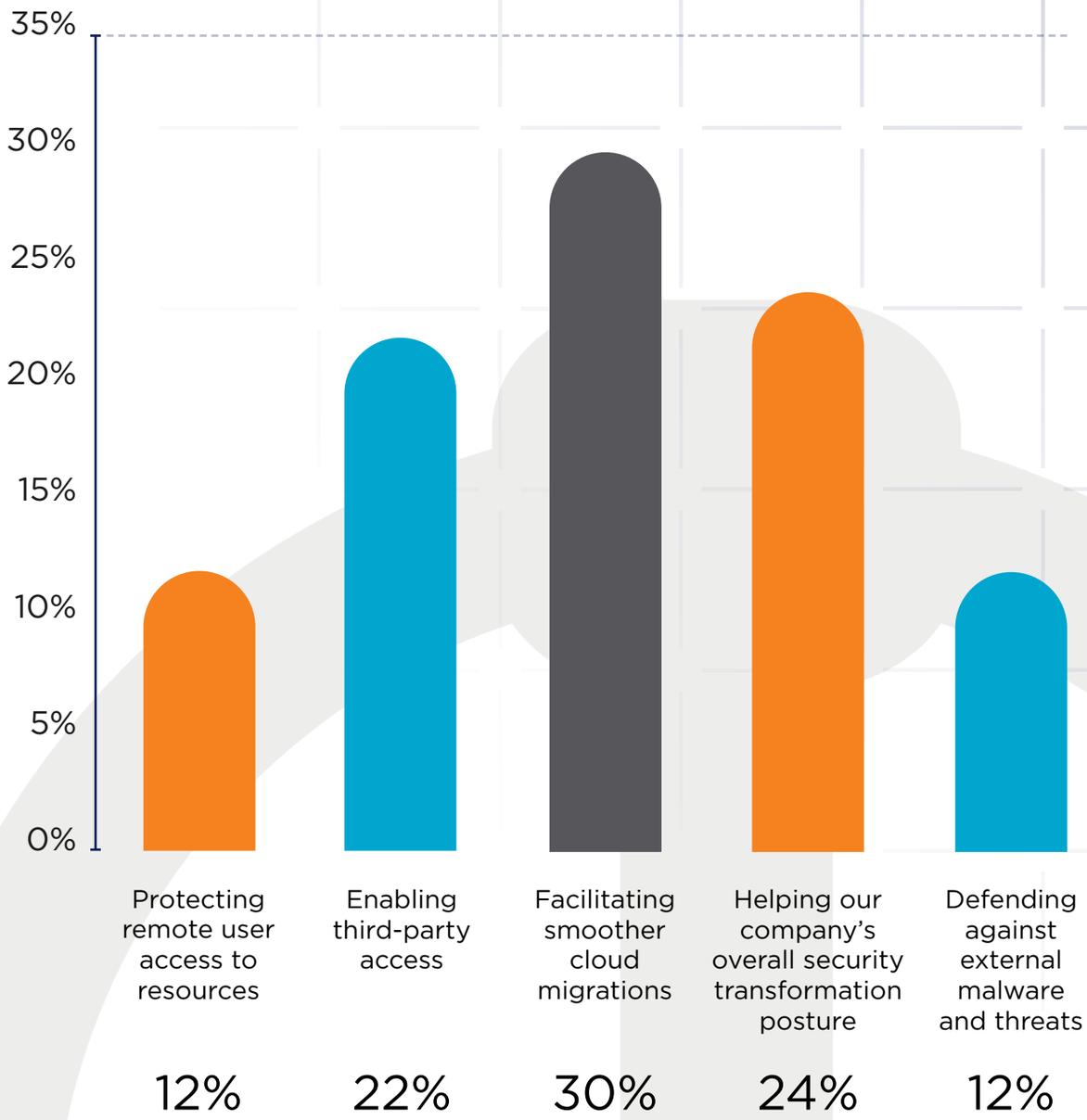
Key Takeaway

While Zero Trust is often held up as an answer to remote and hybrid working challenges, Middle Eastern organisations see the architectural approach as having wider benefit. Respondents see Zero Trust contributing towards strategic goals; facilitating cloud migrations (30%) and enhancing the company's overall security transformation posture (24%).

> Zero Trust is rightly a phrase on a lot of people's lips at the moment, and the key to unlocking its benefits lies in the detail. Zero Trust is not a product, but an architectural approach, and granular insights are key to ensuring that trust decisions are constantly updated as a user's risk profile changes with their location, device and activities.
>
> Rich Davis, Head of Solutions & Strategy, EMEA

QUESTION 7

WHAT'S THE MOST IMPORTANT ELEMENT OF A ZERO TRUST SECURITY MODEL TO YOUR BUSINESS? SELECT ONE.



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Key Takeaway

As a clear indication of the current economic climate, cost reduction and vendor consolidation (32%) was highlighted as the most significant initiative that businesses have in the next three years, where network transformation is a necessary part of their plan. Over the next three years we can expect to see Middle Eastern organisations favouring vendors that can offer a suite of integrated solutions which can fit into tight budget constraints.

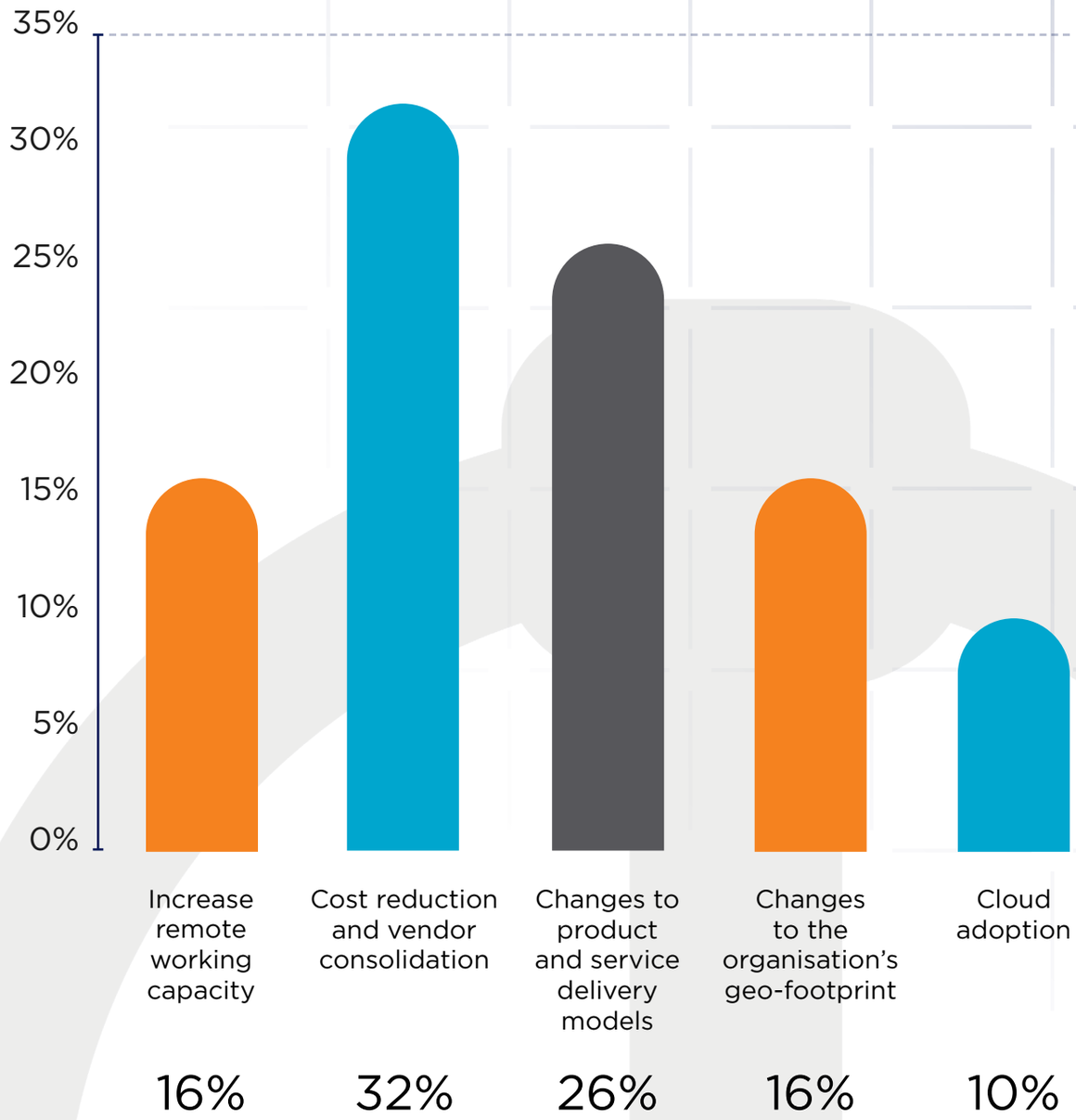
> Today, organisations are typically looking for a platform to support their strategic architectural designs, rather than point solutions that extend and complicate their already sprawling network and security estate. Currently an enormous amount of money is being spent on networking components that are simply no longer getting used as workforces are now hybrid, and organisations are keen to reassess and rebuild to better suit today's needs.

Steve Foster, Solutions Engineering Manager, MEA

QUESTION 8

WHICH MAJOR INITIATIVES DOES YOUR BUSINESS HAVE IN THE NEXT THREE YEARS WHERE NETWORK TRANSFORMATION IS A NECESSARY PART OF THE PLAN?

SELECT ALL THAT APPLY.



CONCLUSION

> Times of transition and transformation are opportunities for growth, innovation and improvement, and it is very clear that we are in such a period at the moment. Transforming security and network architectures is an opportunity for organisations to shed unnecessary cost, strip out legacy and unfit infrastructure and build fit-for-purpose access and security technologies for growth. Our work with Middle Eastern organisations proves there is both appetite and skillset to achieve all the promised benefits of SASE and Zero Trust.

Jonathan Mepsted, Vice President, MEA

Almost two-thirds (56%) of Middle Eastern organisations surveyed have a hybrid workforce. These hybrid workers bring new challenges and put pressure on access technologies as well as security and data protection infrastructure. With a high level of commitment among IT decision-makers to the experience and satisfaction of employees, the region now looks to technology vendors for strategic support and capabilities that help them to navigate the changing cybersecurity risks and their network access needs in coming years.

While there has been a long running and acknowledged trade-off between user experience and security controls, the time has come to jettison these limitations. The successful enablement of hybrid workforces will require companies to manage shadow IT and ensure data security, while enabling access to the data and applications required to get work done – even when they lie beyond the traditional perimeter. Many in the region already anticipate that striking the balance between access and security will be the biggest challenge they face in enabling the hybrid workforce.

The global trend of increasing board level interest and discussions on cyber-risk is clearly seen in the Middle East, made more pertinent due to the Digital Transformation taking place across the region. Infrastructure is in the middle of a transition, with most Middle Eastern organisations using a mixture of on-premises and cloud network architecture. Ninety-four percent use cloud somewhere in their infrastructure.

SASE is seen to offer significant benefits to organisations that successfully transform their security and networking estates, and Zero Trust is a popular architectural principle in the region, holding the promise of smoother cloud adoption and an enhanced overall security posture.

However, change may be driven by much more tactical priorities, with cost reduction and vendor consolidation considered by many to be the most significant network transformation initiative that businesses face in the next three years.

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