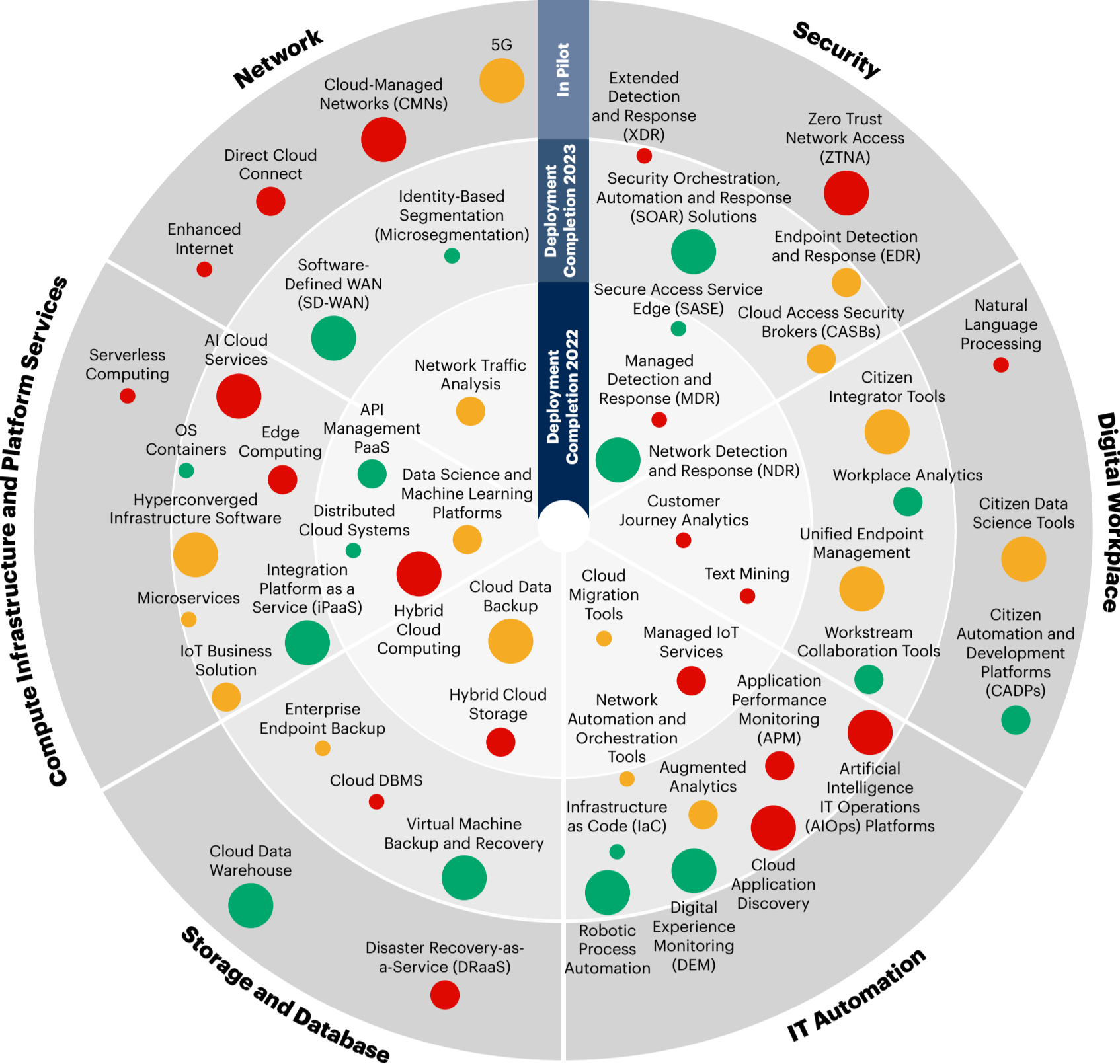


2022-2024 Technology Adoption Roadmap for Midsize Enterprises

IT leaders from more than 400 midsize enterprises (MSEs) collaborated to map the adoption of 53 technologies according to their deployment stage, enterprise value and deployment risk.



Enterprise Value

The value factor awarded to each technology is based on the analysis of value drivers, including increasing cost efficiency, improving speed and agility, enabling resilience, and enhancing employee productivity.



Deployment Risk

The risk factor awarded to each technology is based on the analysis of potential risks posed, including cybersecurity risks, implementation cost, talent availability, vendor supply chain disruption and geopolitical risks.



Key Take-Aways

Cybersecurity



MSEs prioritize investments in Managed Detection and Response (MDR) and threat detection to manage evolving digital risks. MSEs are responding to surging ransomware attacks by deploying MDR, Network Detection and Response (NDR), Endpoint Detection and Response (EDR) and Extended Detection and Response (XDR). MSEs plan to complete deployment of MDR in 2022 despite high implementation risks. Although MSEs appear enthusiastic to deploy XDR by 2023, mainstream deployment may take longer since the XDR market is still in its formative stages.



MSEs deploy Secure Access Service Edge (SASE) while Zero Trust Network Access (ZTNA) remains in pilot. After piloting SASE in 2021, MSEs plan to deploy it by the end of 2022 to shift from hardware-centric security offerings to cloud-centric security services. While zero trust security posture is integral to the SASE architecture, MSEs are still evaluating the benefits and risks of ZTNA, especially as a replacement for VPN.

Future of Work



MSEs prioritize investments in hybrid and remote work environments over collaboration and productivity tools. MSEs have pushed deployment for Workplace Analytics and Workstream Collaboration Tools to 2023. MSEs are prioritizing deployment of cloud and security technologies that strengthen infrastructure for remote and hybrid work. In 2022, MSEs plan to complete deployment of NDR, MDR and SASE. Distributed Cloud Systems and Hybrid Cloud Storage are also trending, prompting their prioritized deployment.



MSEs experiment with Citizen Automation and Development Platforms (CADPs) to enable democratized delivery. While MSEs plan to deploy Citizen Integrator Tools by 2023, they are currently piloting CADPs to support low-code development environments for business users. By investing in lower-risk citizen technologies, MSEs aim to drive business-led IT and hyperautomation while improving speed and agility.



MSEs lag in adoption of Natural Language Processing (NLP) despite prior plans to adopt in 2022. Despite a previously planned deployment in 2021, MSEs remain in the pilot phase for NLP due to accuracy challenges in language translation. Despite advancements in NLP technologies, the complexity and ambiguity of the human language continues to be an obstacle for mainstream deployment.

Productivity and Operational Efficiency



MSEs experiment with Enhanced Internet to manage a complex applications environment. MSEs are piloting Enhanced Internet in 2022 for a reliable, high-performance internet experience at lower costs. A growing number of SD-WAN and SASE vendors offer integrated Enhanced Internet capabilities, prompting MSEs to evaluate potential efficiencies. While 20% of MSEs have already deployed the technology, others are still evaluating how well it lives up to market hype.



MSEs invest in AI (Artificial Intelligence), Data Science and Machine Learning (DSML) platforms to improve operational efficiency of infrastructure. MSEs adopt DSML across, AI cloud services and AIOps to make digital business more observable across on-premises, cloud and edge computing architectures. Despite indicating high-deployment risks for AI technologies, over 64% of the MSEs are either currently deploying or have already deployed AI cloud services and AIOps.



MSEs look beyond 5G services to satisfy the growing demand for network efficiencies. MSEs are piloting 5G in 2022, despite earlier plans for deployment in 2021. Although MSEs identify 5G services as high value, inconsistent coverage and lack of supported devices prevent wider adoption. Instead, MSEs plan to deploy identity-based segmentation, SD-WAN and Network Traffic Analysis by 2023 for secure and consistent network coverage that enhances employee productivity.



MSEs invest in API management PaaS to cope with unpredictable API traffic and limited internal support skills. As an alternative to purchasing stand-alone software to manage APIs, MSEs plan to deploy API management PaaS by end of 2022 after successfully piloting it in 2021. MSEs are recognizing the advantages of API management PaaS in supporting cloud platforms and automation. Talent shortages in specialized skills also preclude MSEs from hiring staff to support API management.