SPOTLIGHT
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A future-proofed workplace platform strategy incorporates various technologies to enable secure productivity, exceptional user experiences, and enhanced operational efficiencies. At the core of this strategy are connectivity-powered solutions across networking, collaboration, observability, and security.

The Secure, AI-Enhanced Technology Platform Powering Future-Proofed Workplaces

May 2025

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The Next-Generation, Future-Proofed Workplace Evolution

Organizations across the globe are reimagining their workplaces as they consider the "new normal" of how to enable secure productivity in the post-COVID-19 pandemic era. This future-proofed workplace must support onsite, remote, and hybrid workers equally and leverage data and AI to improve operations, focusing particularly on enhanced user experience, efficiency, and sustainability. Perhaps most importantly, organizations are striving to create resilient and agile spaces and strategies to meet their current and future needs.

Technological advancement plays a key role in developing future-proofed workplace strategies. IDC's June 2024 *Worldwide Future of Work Survey* found that nearly half of enterprises are prioritizing a technology refresh as part of their onsite work strategy (refer to Figure 2). Data-intensive applications hosted both on premises and in the cloud and the growth of AI workloads are putting increased pressure on connectivity to address the ever-growing bandwidth needs for campuses, branches, remote sites, and remote users (refer to Figure 1).

AT A GLANCE

KEY STATS

- 49% of respondents reported that providing updated technologies for the office was a top element of their organization's strategy for onsite work; another 43% cited promoting team collaboration as a key priority (source: IDC's *Worldwide Future of Work Survey,* June 2024).
- 29% of respondents cited improved employee productivity and skill levels as the top metric for measuring return on investment for work transformation technology initiatives (source: IDC's *Future Enterprise Resiliency and Spending Survey,* March 2024).

One key element of a successful future-proofed workplace strategy involves utilizing a digital-first, security-focused, and AI-enhanced platform approach. This approach combines integrated technology and services that power the modern workplace, including hardware, software, security, and integrated AI, to improve business outcomes across the organization. A future-proofed workplace platform strategy enables businesses to:

- **Focus on employee experiences.** Leveraging advanced technology creates digitally driven onsite environments and facilitates exceptional remote/hybrid employee experiences to improve employee productivity and make the organization more agile.

- **Provide frictionless security.** This approach delivers consistent and powerful security policies and practices everywhere, ensuring sensitive company data is secure while protecting remote or onsite employees and enabling them to be productive.
- **Enable collaboration.** Leveraging state-of-the-art in-office or at-home devices and tools with cloud-based and AI-enhanced software enables workers in any location to collaborate internally or externally.
- **Design smart and sustainable spaces.** Investing in environmentally responsible building designs leveraging AI creates workspaces that are cost efficient, improve sustainability, and reduce carbon footprint.

This IDC Spotlight focuses on the technology-powered, future-proofed workplace strategies that organizations are considering. While the content focuses on carpeted environments, there are similar considerations for customer-facing and production environments (e.g., retail stores or manufacturing sites) that encompass enterprise campus and branch locations too.

Technologies Powering the Future-Proofed Workplace

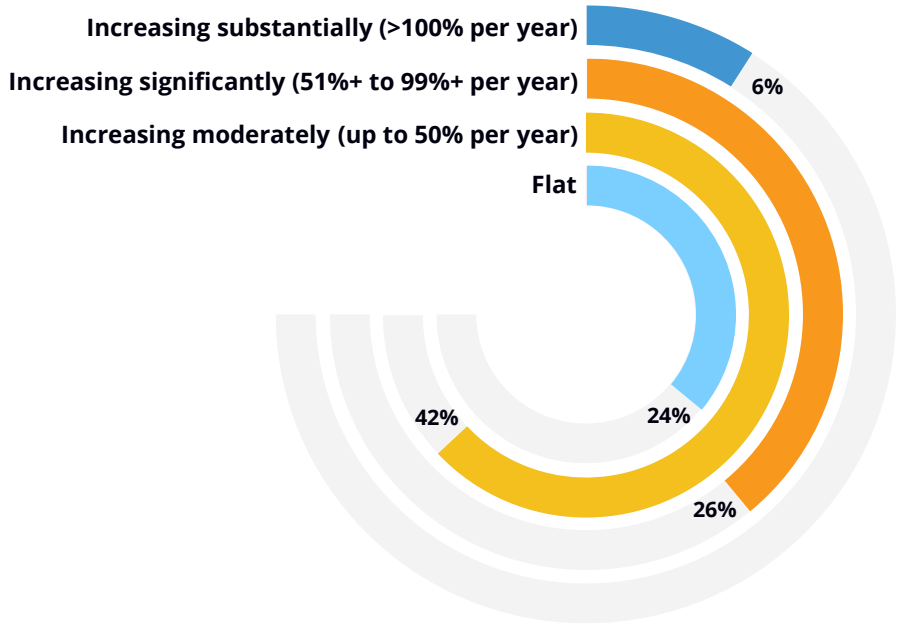
A combination of various technologies will help create a future-proofed workplace platform. Some key components are described in the sections that follow.

Advanced Connectivity

IDC survey data shows that 32% of enterprises worldwide reported that their bandwidth demands increased by more than 50% per year in 2024 (see Figure 1), driven by increased usage of the Internet of Things (IoT), data-intensive tools, and cloud-based applications. At the core of a future-proofed workplace is a unified and comprehensive enterprise platform approach to connectivity. This unified technology footprint uses secure, multi-access networks; Wi-Fi access points; collaboration endpoints; IoT sensors/devices; and cloud-based solutions that empower employees to connect securely regardless of location. Corporate sites, particularly those with return-to-office (RTO) initiatives, need an updated network infrastructure to support increased traffic as employees consume greater bandwidth from unified communications and collaboration (UC&C) tools, videoconferencing, cloud-based applications, AI workloads, and IoT devices.

FIGURE 1: ***Worldwide and Regional Expectations for Bandwidth Growth Over the Past 12 Months***

Q Over the past 12 months, how much has your organization seen bandwidth requirements change?



29% of NA enterprises see bandwidth requirements growing over 50% per year.

36% of EMEA enterprises see bandwidth requirements growing over 50% per year.

33% of AP enterprises see bandwidth requirements growing over 50% per year.

n = 887

Source: IDC's Future Enterprise Resiliency and Spending Survey, Wave 6, June 2024

Connectivity resiliency has become mission critical for organizations in digitally driven industries like financial services, manufacturing, and retail. In fact, business continuity relies on the assurance that connectivity will always be available. Any network outage or bandwidth disruption can create downtime that disrupts operations, stops production, and ultimately impacts revenue. Meeting these bandwidth demands requires a modern approach that guarantees high bandwidth and low-latency connectivity with multi-access networks. This includes technologies such as 6GHz Wi-Fi standards (e.g., Wi-Fi 6E and Wi-Fi 7), multi-gigabit access switching, reliable WAN connectivity via SD-WAN, public and private cellular networks, and fixed wireless access. Advanced, AI-enhanced dynamic path selection and network slicing can control multi-access networks based on governance policies, ensuring high-quality and resilient user experiences regardless of location.

Zero Trust Security

IDC data shows that network and data security is the top challenge for enterprises as they become more agile and connected. In a comprehensive future-proofed workplace strategy, legacy perimeter–based security models fall short in supporting workers connecting from anywhere. Instead of having two sets of policies for onsite and remote, today's preferred method is to embrace a zero trust model that authenticates and continually verifies every user and device.

Cloud-based zero trust security models constantly monitor the enterprise estate for anomalies, such as changes in user, device, or application traffic patterns that can indicate a security incident. Reducing the mean time to identify and the mean time to respond to security incidents by leveraging AI-enhanced security tools helps identify and resolve vulnerabilities before they impact the business.

Cloud-based zero trust security models have central management, can be applied everywhere, and continuously monitor for risks and threats.

Organizations can centrally manage and apply these cloud-enforced zero trust security policies everywhere, enabling a range of benefits. First and foremost, they enable secure productivity, no matter where workers connect. Second, they allow easy scalability within a cloud-based environment as the enterprise grows. Third, they provide a centralized platform that can monitor the entire network footprint, analyze data traffic, and use AI to become smarter as threats evolve.

Collaboration Tools

The COVID-19 pandemic was a significant driver of investment in collaboration tools, allowing employees to easily communicate with each other, share data, and work together more effectively regardless of their location. Today, cloud-based UC&C tools are ubiquitous across the enterprise for onsite and remote workers, spurring investments in hardware and software to ensure that every meeting is successful, regardless of the number of connection points and participants. Key components of a future-proofed workplace collaboration strategy include:

- **Digital endpoints,** ranging from cameras, microphones, and meeting boards to workstations, to create immersive experiences onsite and remotely
- **Advanced, AI-enabled software** to help automate meeting preparation and summaries and enhance experiences
- **Data-driven insights** to improve the collaboration processes, including tracking effectiveness and outcomes

For onsite workers, advanced collaboration tools are a magnet for in-office experiences. For remote workers, they're a critical component in enabling productivity, making collaboration tools a critical consideration for future-proofed workplace strategies.

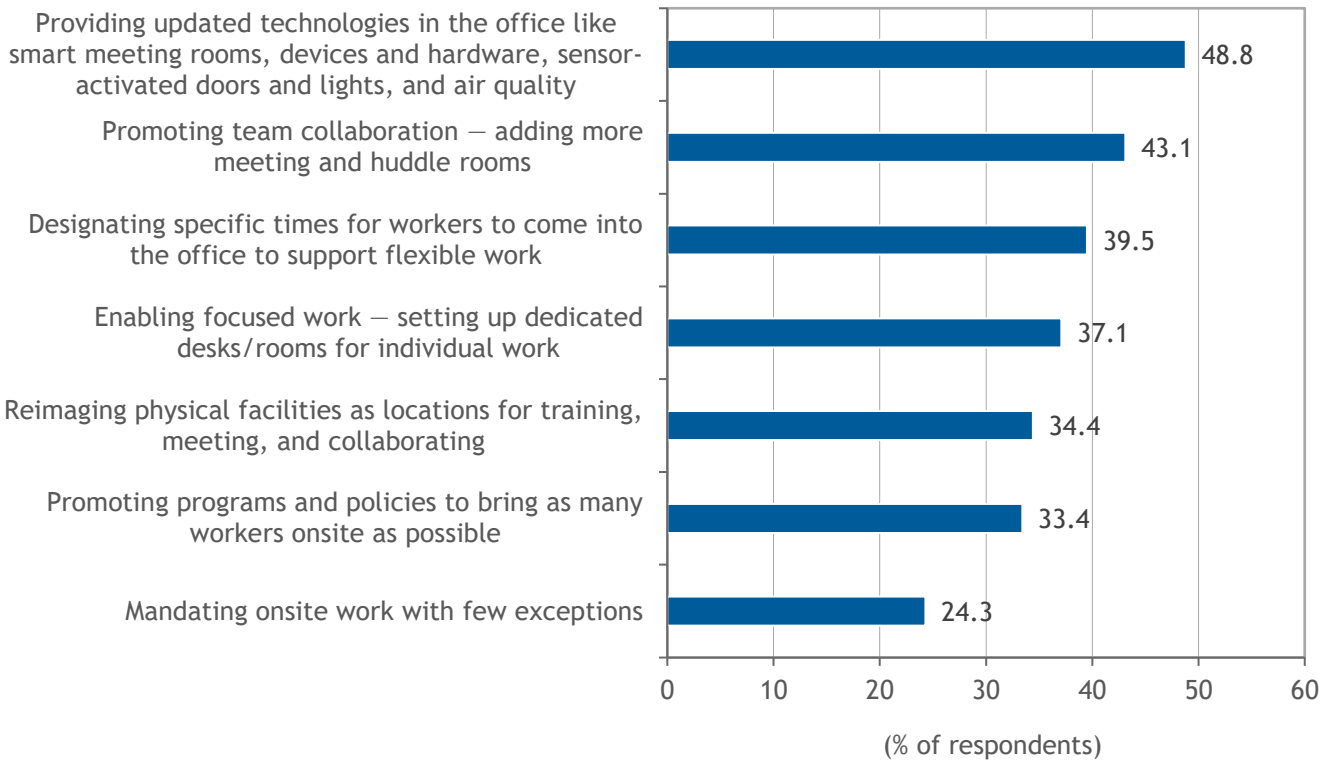
Smart Workspaces

Smart workspaces are key to any enterprise's future-proofed workplace strategy (see Figure 2). The interconnectivity of IoT sensors, automated lighting, and digital workspaces promotes collaboration, enhances user experiences, and improves energy efficiency. Within the office, sensors automatically control lighting and HVAC based on occupancy. Smart, network-connected devices provide real-time data for more effective monitoring and enable predictive maintenance.

Advanced location-based services enable various use cases, from asset tracking and 3D wayfinding to vertical-specific engagement programs, particularly in retail spaces, larger stadiums, sporting venues, and the hospitality industry.

FIGURE 2: ***Upgrading Technology Is a Top Strategy for Onsite Work***

Q. Which of these are elements in your organization's strategy for onsite work?



n = 1,269

Source: IDC's Worldwide Future of Work Survey, June 2024

The Power of AI for Future-Proofed Workplaces

The impact of AI on the workplace cannot be overstated as businesses seek to ensure they're not left behind in the AI era. IDC's October 2024 *Future Enterprise Resiliency and Spending Survey, Wave 10*, found that 45% of enterprises expect to increase their IT budgets in 2025 to ensure timely investment in AI, driving greater efficiency in customer engagement, IT and line-of-business processes, and data-driven decision-making. AI plays a critical role in future-proofed workplace strategy development and execution, specifically in two major areas:

- **Improving operations:** Modern workplaces produce a plethora of data that AI models can leverage to improve business operations. In networking, for example, IDC's September 2024 *AI in Networking Special Report Survey* found that AI-powered network management can provide various benefits, from boosting IT staff productivity to increasing business agility and resolving problems faster. AI-enhanced facilities management, remote worker digital experience assurance, and AI-based security tools show the range of AI use cases in improving business operations.

- **Improving productivity:** A future-proofed workplace strategy should facilitate secure and efficient use of AI. This includes ensuring the network can handle the particular demands of AI workloads (e.g., burstable, two-way traffic patterns that are latency, jitter, and throughput sensitive) and the secure usage of AI with tools, such as advanced data loss prevention, which are specifically designed for AI workloads and agents.

Benefits of a Platform Approach to Future-Proofed Workplaces

A platform approach for reimagining workplaces now and into the future provides various benefits, including:

- **Enabling business agility and resilience:** In the post-pandemic era, organizations seek agility in their operations to prepare for future uncertainties while being resilient to change. From a workplace strategy perspective, this means supporting workers, customers, and partners — no matter where they interact with the business — through advanced technology solutions with consistent security.
- **Optimized network connectivity with simpler centralized management:** Connectivity is a central component of a future-proofed workplace platform strategy. Networking systems are becoming easier to deploy, optimize, fix, and manage owing to advancements in AI-powered network management. Ensuring secure and high-quality connectivity for any user, device, or application, regardless of location, is a key benefit of a successful future-proofed workplace strategy.
- **Advancing AI-driven processes:** A future-proofed workplace platform strategy enables organizations to take advantage of their massive amounts of data securely and facilitate AI use for productivity. This is critical, as IDC predicts that by 2027, 60% of the G1000 will use AI to create new metrics from collaboration, integrated applications, and behaviors, linking them to business outcomes not currently measured (see *IDC FutureScape: Worldwide Future of Work 2025 Predictions,* IDC #US51665624, October 2024).
- **Improving security and employee experience:** A future-proofed workplace strategy should support the consolidation of tools and processes that allow for strict security policies while enabling productivity via seamless connectivity to critical applications regardless of location.
- **Enhancing sustainability:** The combination of real-time data, AI-powered analytics, and automated actions for facility systems results in lower costs for operating sites, a smaller carbon footprint, and enhanced, data-driven decision-making about real estate investments.

Considering Cisco

Cisco's platform approach brings together key solutions across networking, security, observability, and collaboration to help organizations build future-proofed workplaces and experiences. This includes secure campus and branch networking, user protection, collaboration devices and software, and smart building technology, with AI embedded across all to assist, augment, and automate processes:

- **Secure campus and branch networking:** Cisco's solutions seamlessly integrate security, assurance, and intelligence across the entire network. This includes a comprehensive portfolio encompassing switching, routing, wireless, and SD-WAN, with embedded security and network assurance to keep everything across an organization's network up and running. Cisco's portfolio features the Catalyst and Meraki product lines, which include access layer WLAN;

Ethernet switches for campus, branch, and datacenter environments; and routing and SD-WAN connectivity solutions with integrated security. Cisco also introduced new intelligent, secure, and assured wireless innovations, with smart Wi-Fi 7 access points and unified subscription licensing that can enable smart spaces out of the box.

- **Comprehensive network visibility and assurance:** ThousandEyes provides end-to-end visibility across owned and unowned networks, AI-driven intelligence with automated insights, and closed-loop operations with automated workflows to help organizations quickly address network issues and enable digital experiences for workers. ThousandEyes Traffic Insights correlates flow data with synthetic data enabling organizations to proactively optimize and resolve performance issues before they escalate. Splunk brings together assurance insights from ThousandEyes with data across applications, infrastructure, and more for visibility across the enterprise and improved digital resilience.
- **User protection:** Cisco offers a comprehensive portfolio that helps organizations build layered defenses, including endpoint devices, email, and the applications used by employees. This includes Universal ZTNA, which converges SSE (Secure Access), Identity Intelligence (Duo), and SD-WAN to enable every user and device to securely connect to any application from anywhere. Cisco's portfolio also includes protection for email (Email Threat Defense) and advanced endpoint protection (via Secure Endpoint). Importantly, as users embrace AI productivity tools, Cisco AI Defense provides full visibility into app usage and enforces policies that ensure safe, secure access — all powered by Cisco Secure Access and enhanced with AI-specific protections.
- **Collaboration devices and software:** Cisco helps organizations build immersive experiences for in-office, remote, and hybrid workers with an AI-powered platform that includes a range of collaboration tools (Webex Suite) and purpose-built devices for meeting rooms and desktops (Cisco Devices). Employees can work together effectively, wherever they are located. AI is embedded across the Webex Suite and Cisco Devices, delivering immersive experiences across audio, video, and language intelligence. Webex brings together all AI interactions into the unified AI Assistant, summarizing calls and meetings, translating into 120+ languages, and helping users find and digest information faster.
- **Smart building technology:** Cisco Spaces enables use cases such as wayfinding via 3D mapping, occupancy and density tracking with contextual engagements, and asset tracking with location analytics. Deep integrations between Cisco's networking and collaboration portfolio with Cisco Spaces mean every connected device becomes a sensor. By bringing together data and insights from devices across the entire network — collaboration devices, Wi-Fi access points, switches, sensors, and other third-party devices — organizations can make more informed decisions about real estate investments and space optimization.
- **Integrated AI-powered operations:** Cisco has integrated AI capabilities embedded across these solutions to assist, augment, and automate things for organizations, from optimizing network management and enhancing user experiences to thwarting security issues.

Challenges

Enterprises and their technology suppliers such as Cisco will face various challenges in enabling future-proofed workspaces. A significant issue is a lack of coordination between business objectives and technology investments. By their nature, future-proofed workplace strategies are multidisciplinary within organizations, involving stakeholders across technology (e.g., networking, security, cloud, and applications), HR, facilities, and various line-of-business leaders.

Alignment within the organization is imperative. A key to overcoming this challenge is strong executive-level leadership (e.g., CEO, CIO, and CTO) to guide a strategy and execute the technology platform. Cisco and its partners also have an important strategic role as consultative partners.

When it comes to technology strategy decisions, alignment between networking and security teams remains siloed in many organizations. In addition, organizations will have varying levels of willingness to use advanced, AI-enhanced capabilities, and Cisco will have to meet them where they are in their AI maturity. Cisco has an opportunity to be a trusted partner to help organizations work through these issues to ensure a successful future-proofed workspace technology strategy.

Conclusion

Organizations that pursue future-proofed workplace strategies encompassing business goals, advanced technology, and AI will be in a strong position to compete in the modern digital era. RTO and the future of work have increased the importance of modern, scalable, and platform-based approaches where connectivity, security, and AI are central themes. As employees generate and consume more data over time, digital business needs will increase bandwidth demands, and with employees expecting the same digital experience regardless of location, it's clear that future-proofed workplace strategy is a key accelerant for modernization.

For enterprises looking to maximize the value of modernization efforts, a platform approach helps deliver the fastest outcomes for the workplace. It provides an integrated framework that unifies and enhances operational efficiencies, centralizes business processes, and maximizes AI's value. The most effective enterprises will be the ones that leverage technology to enhance human-machine interaction, enable new skill sets and employee experiences, and evolve the physical workplace into a modern digital workspace.

About the Analysts

Paul Hughes, *Research Director, Future Enterprise Connectivity Strategies*

Paul Hughes is a key member of IDC's larger Worldwide Telecom Research team, responsible for research related to the future innovation and transformation of how data and connectivity impact people, things, applications, and processes used by enterprises and end users. Paul brings over 20 years of experience in telecommunications services, software, digital transformation research, product marketing, and strategy to IDC.

Brandon Butler, *Senior Research Manager, Enterprise Networks*

Brandon's research focuses on market and technology trends, forecasts, and competitive analysis in enterprise campus and branch networks. His coverage includes technologies used in local and wide area networking, such as Ethernet switching, routing/SD-WAN, wireless LAN, and enterprise network management platforms.

MESSAGE FROM THE SPONSOR

Cisco helps organizations modernize everywhere people and technology work and serve customers. Only Cisco unifies networking with collaboration and security, with AI embedded across all, to power future-proofed workplaces. We help organizations build workplaces and experiences that are agile to adapt to the evolving needs of employees and how they serve customers, while staying resilient from emerging risks. Cisco's platform approach uniquely brings together key capabilities including secure campus and branch networking, user protection, collaboration devices and software, and smart building technology — with AI embedded across all, to deliver future-proofed workplaces and experiences.

By unifying these core elements, we deliver compounding value, harness data and insights to assure experiences, and offer the extensibility to integrate with a wide ecosystem of solutions.

Learn more about our new Future-Proofed Workplaces innovations.

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