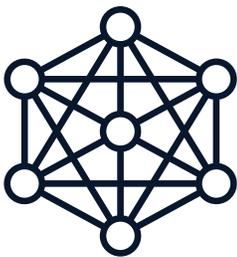


# In the AI era, infrastructure strategy drives business strategy

## AI is transforming how work gets done – and the pressure on networks is mounting

Cisco's global study reveals a major architectural shift underway across enterprise networks. As AI assistants, agents, and data-driven workloads reshape how work gets done, they're creating faster, more dynamic, more latency-sensitive, and more complex network traffic. The network is no longer just infrastructure. It's strategy. It's value. And it's the priority for leaders.

## Six signals an architectural shift is underway – and why the modern network must be smarter, more secure, and more adaptive



### The network has become a strategic priority

1

The network has powered every wave of digital transformation so far. To support AI, IoT, and cloud at scale, the network is foundational. IT leaders are aligning investment with this reality.

- 94% say AI, IoT and cloud computing will have the greatest impact on their network in the next 2 years; 62% say it'll be down to AI alone
- 97% say a modernized network is critical to rolling out AI, IoT, and cloud
- 91% plan to increase the share of IT budget allocated to networking

### Secure networking is mission critical

2

As cyber threats grow more sophisticated, the network acts as the first line of defense to help security teams address the emerging AI-driven risks more effectively.

- 98% say secure networking is important to operations and growth; 61% say it's critical
- 94% believe a modernized network will enhance cybersecurity





### AI intensifies demand for resilient networks

3

AI needs fast, uninterrupted access to data, but many networks can't keep up. Leaders know outages cost more than downtime – they cost revenue, productivity, and growth.

- 77% have faced major outages in the last two years
- Leading causes of disruption: congestion, cyberattacks, software or configuration errors
- More than half (52%) said that revenue was the business area most impacted by disruptions
- This adds up to \$160B globally\* from just one severe disruption per business, per year

### Leaders look to AI to grow revenue

4

Networks don't just enable AI – they unlock its value. Personalization, automation, and faster decision-making start with network architectures built for the demands of the AI era.

- 55% say deploying AI tools to automate and tailor customer journeys will deliver the biggest revenue impact to their business
- 98% say moving to the next stage of network architecture maturity will increase their ability to unlock more financial value for their organization

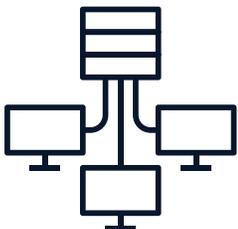


### AI is reshaping infrastructure

5

Today's AI workloads demand more from networks, driving leaders to reimagine how they scale, optimize, and architect their infrastructure to meet these growing demands.

- 71% say their data centers can't scale AI
- 88% plan to expand capacity to support AI workloads across on-prem, cloud, or both
- Only 11% of data centers are fully optimized for AI workloads with advanced capabilities

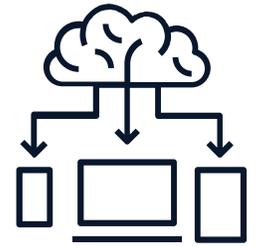


## Leaders want to make networks smarter

6

There's a clear vision for where networks need to go – autonomous, secure, and intelligent. But there's work to do to close critical architectural and capability gaps.

- 98% say AI-native, autonomous networks are essential to future growth
- Only 41% have deployed intelligent capabilities like segmentation, visibility, and control



## The network you build today will decide the business you become tomorrow

- **AI-ready infrastructure** that expands data center, edge, and cloud environments to run high-performance workloads closer to where data is created – unlocking lower latency and faster decisions.
- **Future-ready workplaces** with networks built for AI-powered collaboration and consistent user experiences – so teams can move faster, smarter, and more securely.
- **Resilient security by design** that turns the network into a line of defence – with built-in segmentation, observability, and automation to stay ahead of rising threats.

## The architecture is shifting.

And the opportunity to build the next generation of businesses on the next generation of AI-ready infrastructure is now.



### About the research

This global study is based on a survey of 8,065 senior IT and business leaders responsible for networking strategy and infrastructure at organizations with 250 or more employees. The survey was conducted across 30 markets in December 2024 by Sandpiper Research & Insights, on behalf of Cisco.

*\*Estimated using the average cost of disruption reported by IT leaders, extrapolated globally based on the number of companies with 250+ employees (source: Statista) and aligned to the profile of Cisco's survey sample.*

Cisco research: A major infrastructure shift is underway. AI could double the strain or solve it.

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