Top 10 SD-WAN Trailblazers: The Missing "Link" in Enterprise Digital Transformation Story
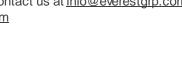
Cloud and Infrastructure Services (CIS)
Market Report – November 2019: Complimentary Abstract / Table of Contents

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Custom research capabilities

- Benchmarking | Pricing, delivery model, skill portfolio
- Peer analysis | Scope, sourcing models, locations
- Locations | Cost, skills, sustainability, portfolio – plus a tracking tool
- Tracking services | Service providers, locations, risk
- Other | Market intelligence, service provider capabilities, technologies, contract assessment

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Background of the research

Background of the research
- Networks have traditionally been the most neglected component of IT infrastructure. Digital transformation within enterprises has so far focused on the compute aspect, with cloud being the main driver. However, enterprises now realize that without network transformation, optimum benefits of digital transformation cannot be realized. Wide Area Networks (WAN) transformation is becoming the starting point of network transformation for most enterprises due to its immediate cost benefits and low business disruption

- Traditional Wide Area Network (WAN), which consists of single-function proprietary devices connected via different WAN links, is suboptimal to support the agile and dynamic networking needs of the modern, cloud-driven IT. With increasing public cloud adoption, networks do not connect users to a central datacenter but to multiple IaaS and SaaS providers. Software Defined Wide Area Network (SD-WAN) becomes a key transformation lever for enabling direct connectivity from remote sites into the cloud, typically through the internet

- Start-ups stand to play a key role in the SD-WAN ecosystem by driving innovation across network segments through next-generation concepts such as orchestration, cloud-based security, analytics, and automation. Significant Venture Capitalists (VC) investments, partnerships with large established players, and acquisitions by technology majors are indicators of the increasing start-up relevance in this space

- In this research, we present an assessment of SD-WAN vendor start-ups, primarily focused on their innovation, growth story, and the impact created in the market. We present an assessment and detailed profiles of 10 SD-WAN start-ups providing services and solutions such as edge SD-WAN appliances, multi-cloud connectivity, enhanced application performance, branch platforms, optimized bandwidth usage, cloud security, and managed SD-WAN. Each start-up profile provides a comprehensive picture of its technology capabilities, market growth, and the perceived investor confidence

- The assessment is based on secondary research and analysis, interaction with Communication Service Providers (CSPs), and IT system integrators
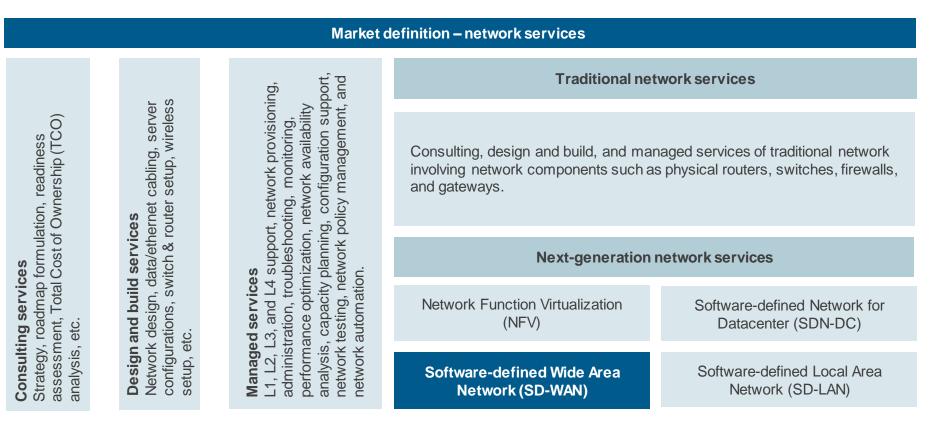
Scope of this report
- **Services:** Network services
- **Geography:** Global
- **Companies:** 10 leading SD-WAN start-ups

Source: Everest Group unless specified otherwise

This report focuses on network services and offers insights into the prominent start-ups providing SD-WAN solutions

■ Focus of this research

Market definition – network services

Consulting services
Strategy, roadmap formulation, readiness assessment, Total Cost of Ownership (TCO) analysis, etc.

Design and build services
Network design, data/ethernet cabling, server configurations, switch & router setup, wireless setup, etc.

Managed services
L1, L2, L3, and L4 support, network provisioning, administration, troubleshooting, monitoring, performance optimization, network availability analysis, capacity planning, configuration support, network testing, network policy management, and network automation.

Traditional network services

Consulting, design and build, and managed services of traditional network involving network components such as physical routers, switches, firewalls, and gateways.

Next-generation network services

Network Function Virtualization (NFV)

Software-defined Network for Datacenter (SDN-DC)

Software-defined Wide Area Network (SD-WAN)

Software-defined Local Area Network (SD-LAN)

Our research methodology is based on four pillars of strength to produce actionable and insightful research for the industry

- Market thought leadership
- Actionable and insightful research
- Syndicated and custom research deliverables

1 **Robust definitions and frameworks**
(PEAK Matrix, market maturity, and technology adoption/investment)

2 **Primary sources of information**
(Annual contractual and operational RFIs, service provider briefings, and market feedback)

3 **Diverse set of market touchpoints**
(Ongoing interactions with key stakeholders, input from a mix of perspectives and interests, as well as support via data analysis and thought leadership)

4 **Fact-based research**
(Data-driven analysis with expert perspectives, trend analysis across market adoption, contracting, and service providers)

- Annual RFI process and interaction with leading IT infrastructure and network service providers
- Dedicated team for IT infrastructure and network services adoption trends
- Over 25 years of experience in advising clients on global services decisions
- Executive-level relationships with buyers, service providers, technology providers, and industry associations

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This study offers a deep dive into key aspects of SD-WAN market and how start-ups are playing a crucial role in shaping the industry; below are four charts to illustrate the depth of the report

Defining SD-WAN and its characteristics

A1 — Awareness
- Application-aware traffic routing to connect users with applications across the WAN
- Network topology visualization and analytics on application traffic and performance

A2 — Agnosticism
- Independent of the underlay technologies and service providers
- Allows enterprises to use any combination of transport services such as MPLS, Long-Term Evolution (LTE), and broadband

A3 — Abstraction
- Abstraction of management, control, and forwarding plane from the network equipment
- Centralized management and control for deployment, policy enforcement, reporting, and troubleshooting

Evolving approach for SD-WAN implementation

Current adoption trends
- Use of grey box equipment
- Single vendor ecosystem
- Focus on cost reduction
- Security as an afterthought
- Network traffic-driven
- One-size-fits-all solution

Tenets of future SD-WAN implementation approach
- Moving from proprietary SD-WAN solutions (grey box) from vendors such as Cisco and VMware to white box solutions using commercial, off the shelf hardware with the virtualization layer on top
- Moving from a single vendor approach to multi-vendor, business intent-driven SD-WAN solution
- Including security as a key SD-WAN player rather than an afterthought
- Building a customized approach in line with enterprise network and application landscape over adopting a single SD-WAN solution for all needs

Future adoption model
- Use of white box equipment
- Multi-vendor ecosystem
- Focus on enhancing business agility
- Built-in security
- Business intent-driven
- Best-of-breed customized solution

Top 10 SD-WAN trailblazers

- 128 TECHNOLOGY
- aryaka
- bigleaf networks
- CATO NETWORKS
- CLOUDGENIX
- InnuCloud SD-WAN Experts
- MULTAPPLIED NETWORKS
- Simplewan
- VERSA NETWORKS
- zenlayer

Honorary mentions[1]
- LAVELLE NETWORKS
- mushroom NETWORKS
- silver peak

Evaluation of shortlisted startups

□ Low ▪ High

Shortlisted start-ups	Vision and strategy	Technology disruption	Investor confidence	Market growth
Start-up 1	▪▪▪▪□	▪▪▪▪□	▪▪▪▪□	▪▪▪▪□
Start-up 2	▪▪▪□□	▪▪▪▪□	▪▪▪▪□	▪▪▪▪□
Start-up 3	▪▪□□□	▪▪□□□	▪▪▪▪□	▪▪▪□□
Start-up 4	▪▪▪▪□	▪▪▪□□	▪▪▪▪□	▪▪▪▪□
Start-up 5	▪▪▪▪□	▪▪▪▪□	▪▪▪▪□	▪▪▪▪□
Start-up 6	▪▪▪▪□	▪▪▪□□	▪▪▪□□	▪▪▪▪□

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Research calendar – Cloud and Infrastructure Services

■ Published   ▨ Planned   ⌐⌐ Current release

Flagship CIS reports	Release date
Digital Workplace Services PEAK Matrix™ Assessment 2019: Enterprises, It is Time to Humanize the Workplace Experience	June 2019
Next-generation Infrastructure Services for Insurance PEAK Matrix™ Assessment 2019 and Market Trends	June 2019
Next-generation Infrastructure Services for BFS – PEAK Matrix™ Assessment 2019 and Market Trends	June 2019
DevOps Enablement Services PEAK Matrix™ Assessment 2019 and Market Trends	July 2019
Top 20 Digital Workplace Trailblazers: Creating Connected Experiences for Digital-savvy Enterprises	October 2019
Exploring the Enterprise Journey Towards "Invisible" IT Infrastructure	October 2019
Top 10 SD-WAN Trailblazers: The Missing "Link" in Enterprise Digital Transformation Story	**November 2019**
Cloud Services PEAK Matrix™ Assessment 2019 and Market Update	Q4 2019
Next-generation Network Transformation Services PEAK Matrix™ Assessment 2019 and Market Trends	Q4 2019

Thematic CIS reports	
Upcoming Contract Renewals – Infrastructure Services	January 2019
Enterprise Pulse Report: The Dissatisfaction Conundrum	January 2019
Viewpoint – Edge Computing	February 2019
Security Operations for the Digital World	Q4 2019
Tech Bytes – Debunking Containers Myth	Q4 2019
Workplace services: SLA is Dead; Long Live SLAs	Q4 2019

Note: For a list of all of our published CIS reports, please refer to our website page

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Additional ITS research references

The following documents are recommended for additional insights on the topic covered in this report. The recommended documents either provide additional details or complementary content that may be of interest

1. **Cloud Enablement Services PEAK Matrix™ Assessment 2019 and Market Trends: An Enterprise Primer for Adopting (or Intelligently Ignoring!) Cloud Native** (EGR-2018-29-R-2850): With cloud becoming the bedrock of digital businesses, "cloud native" promises to be the default operating model for future enterprises and is garnering significant enterprise interest. However, the cloud-native concept has somewhat been misunderstood and under-positioned with respect to the complexities involved in practicing it and the immense business value that can be realized thereof. This report provides a market trend assessment of cloud enablement services along with detailed profiles and assessment of 24 IT service providers featured on Everest Group's PEAK Matrix for cloud enablement services

2. **IT Security Services PEAK Matrix™ Assessment and Market Trends: Enterprise Security Journeys and Snowflakes– Both Unique and Like No Other!** (EGR-2018-29-R-2880); 2019. With IT security increasingly seen as the enabler of digital businesses, enterprises are being pushed to take a more guided and contextualized approach toward security within business transformation. Moreover, contextualizing security services based on vertical, geography, and unique organization nuances requires careful evaluation on the part of enterprises in terms of their technology adoption roadmap, budget spend optimization, and broader business goals. This report provides a market trend assessment of IT security services along with detailed profiles and assessment of 21 IT service providers featured on Everest Group's PEAK Matrix for IT security services

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