Software-Defined Wide Area Network (SD-WAN) Services PEAK Matrix® Assessment 2021

October 2021: Complimentary Abstract / Table of Contents

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Contents

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Contents

Background of the research

With the acceleration of digital transformation among enterprises, wherein they are adding more services and applications to their networks, the traditional WAN network is no longer efficient to handle the enterprises' network requirements. Thus, enterprises are shifting to the adoption of SD-WAN solutions that offer better network traffic management, visibility, and security along with lower operating costs and investments. However, with several adoption challenges that include interoperability issues, change management, lack of trained resources, and poor visibility into application performance, enterprises are looking for partners to aid in their SD-WAN adoption journey. The choice of the right partner is crucial to ensure successful deployments of SD-WAN and eventually supplement the digital transformation journey of enterprises.

In this research, we present an assessment of 16 SD-WAN service providers featured on the SD-WAN services PEAK Matrix®. The assessment is based on Everest Group's annual RFI process for calendar year 2020, interactions with leading SD-WAN service providers, client reference checks, and an ongoing analysis of the SD-WAN services market.

This report includes the profiles of the following 16 leading network service providers featured on the SD-WAN Services PEAK Matrix®:

- **Leaders:** Accenture, AT&T, BT, HCL Technologies, Orange Business Services, and TCS
- **Major Contenders:** IBM, Infosys, Microland, NTT, Tata Communications, Telstra, Verizon, and Wipro
- **Aspirants:** Mphasis and Zensar
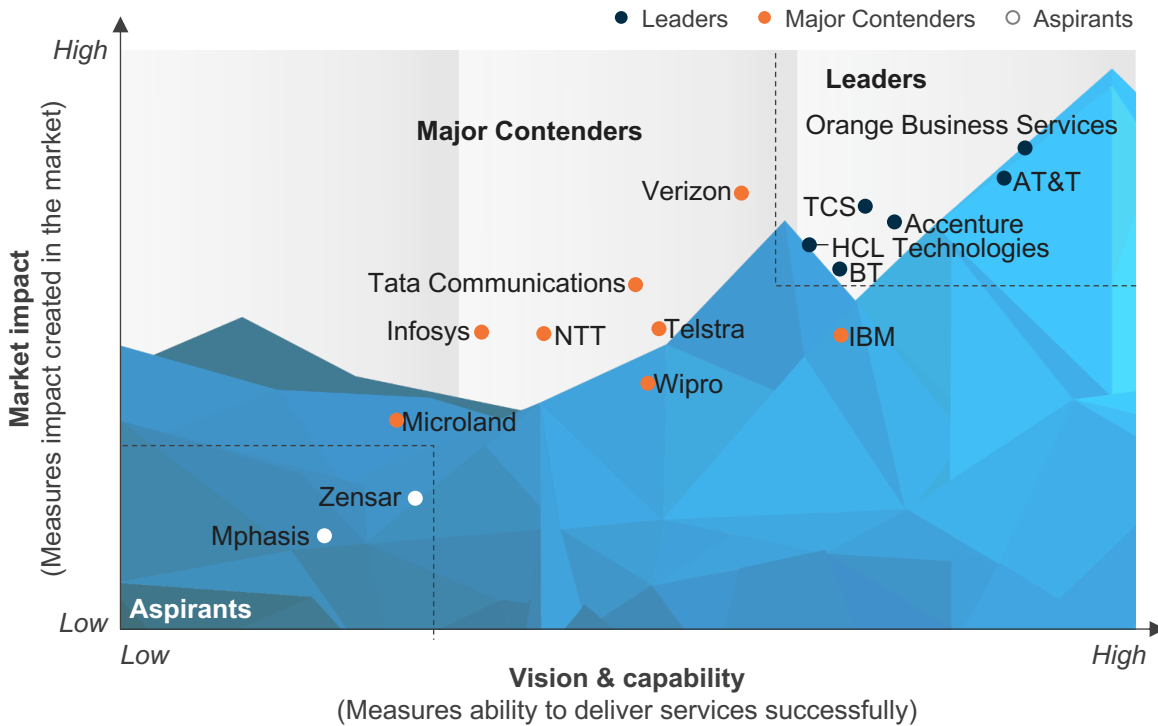
Scope of this report:

Geography
Global

Service providers
16

Services
SD-WAN services

This study offers three distinct chapters providing a deep dive into key aspects of SD-WAN services market; below are three charts to illustrate the depth of the report

Software-Defined Wide Area Network (SD-WAN) Services PEAK Matrix® Assessment 2021[1]

Illustrative example

● Leaders   ● Major Contenders   ○ Aspirants

High

Market impact (Measures impact created in the market)

Leaders

Orange Business Services

AT&T

Major Contenders

Verizon

TCS

Accenture

HCL Technologies

BT

Tata Communications

Infosys

NTT

Telstra

IBM

Wipro

Microland

Zensar

Mphasis

Aspirants

Low

Low ——————————— **High**

Vision & capability
(Measures ability to deliver services successfully)

1   Assessments for AT&T, BT, IBM, NTT, Telstra, and Verizon exclude service provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, ongoing coverage of these service providers, service provider public disclosures, and Everest Group's interaction with buyers.

Note: The source of all content is Everest Group unless otherwise specified.

Confidentiality: Everest Group takes its confidentiality pledge very seriously. Any contract-specific information collected will only be presented back to the industry in an aggregated fashion.

Capability assessment

Illustrative example

Measure of capability: ◑ Low   ● High

Service provider	Market impact				Vision & capability				
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
Service provider 1									
Service provider 2									
Service provider 3									
Service provider 4									
Service provider 5									
Service provider 6									
Service provider 7									
Service provider 8									
Service provider 9									

Everest Group's remarks on service providers

Illustrative example

Measure of capability: ◑ Low   ● High

Market impact				Vision & capability				
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall

Strengths

- Service provider 1 has made credible investments in developing its IPs and solutions for network automation and SDN
- It has developed industry-wise use cases for several next-generation network technologies including private 5G, SDN, and cloud-native networks

Limitations

- Service provider 1 rarely engages in standalone network transformation engagements and its network services are usually bundled along with other digital transformation initiatives
- It has multiple local partners for certain geographies, leading to less control on service quality

Research calendar
Cloud and Infrastructure Services (CIS)

Flagship CIS reports	Release date
System Integrator (SI) Capabilities on Google Cloud Platform (GCP) Services PEAK Matrix® Assessment 2021	December 2020
System Integrator (SI) Capabilities on Microsoft Azure Compendium 2021	December 2020
System Integrator (SI) Capabilities on Google Cloud Platform (GCP) Services Compendium 2021	December 2020
Cloud Hyperscalers: A Critical but Not the Only Building Block of Enterprise IT	June 2021
IT Managed Security Services (MSS) PEAK Matrix® Assessment 2021	June 2021
State of the Market: IT Infrastructure Automation Services	June 2021
Network Transformation and Managed Services PEAK Matrix® Assessment 2021	July 2021
Software-Defined Wide Area Network (SD-WAN) Services PEAK Matrix® Assessment 2021	**October 2021**
State of the Market: IT Infrastructure Services	Q3 2021

Thematic CIS reports	Release date
Future-proofing Enterprise Transformation with Cloud-agnostic Managed Services	February 2021
Upcoming Contract Renewals – Infrastructure Services 2021	March 2021
Enterprise Pulse Report: From Dissatisfaction to Delight: Sustaining Client Satisfaction in a Post-pandemic World	March 2021
Tech Bytes for Business Leaders: Containers	August 2021
Tech Bytes for Business Leaders: Workplace-as-a-service (WaaS)	August 2021

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