

# Software-Defined Wide Area Network (SD-WAN) Service Provider Compendium 2022

January 2022: Complimentary Abstract / Table of Contents



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**Mukesh Ranjan**, Practice Director

**Titus M**, Senior Analyst

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## 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 the profiles 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

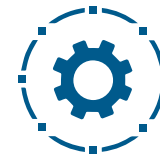
### Scope of this report:



**Geography**  
Global



**Service providers**  
16



**Services**  
SD-WAN services

## Market definition – SD-WAN services

### Software Defined Wide Area Network (SD-WAN) services – market definition

#### Consulting services

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

#### Design and build services

SD-WAN designs, router consolidation, router & gateways configuration, integration with SD-WAN appliances, SD-WAN Edge, SD-WAN tunnel virtual connections, SD-WAN virtual connection end points, and underlay connectivity services

#### Managed services

L1, L2, L3, and L4 support, device management, service fulfilment, and monitoring & managing WAN service

### SD-WAN services

These include deployment types such as premises-based SD-WAN, carrier-based SD-WAN, internet-based SD-WAN, private network-based SD-WAN, and cloud-based SD-WAN, and services such as secure, IP-based virtual overlay network, transport independence of underlay network, service assurance of SD-WAN tunnels, application-driven packet forwarding, multiple WANs to ensure high availability, policy-based packet forwarding, service automation, managing Whitebox, Britebox, and WAN optimization.



# The report includes detailed profiles for 16 leading service providers

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## Service Provider | SD-WAN services (page 1 of 2)

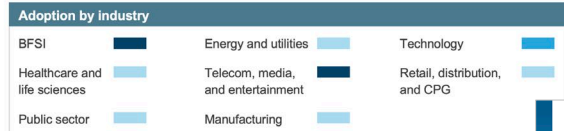
### Overview

Service provider wants to accelerate enterprises' digital journey by optimizing network devices and streamlining networking processes and architectures and build networks that can perform auto heal and self-provisioning, based on application and business needs.

#### SD-WAN services revenue



Low (<10%) Medium (10-20%) High (>20%)



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## Service Provider | SD-WAN services (page 2 of 2)

### Solutions, partnerships, investments, and recent activities

#### Proprietary solutions (representative list)

Solution	Details of the tool/solution
Managed SD-WAN	It analyzes and prioritizes the traffic going through the network, enabling enterprises to make smarter decisions and respond quickly.
Datacenter Network	It accelerates, de-risks change, and streamlines operations by leveraging network automation and orchestration. It helps enterprises design and deploy enterprise network switching and routing solutions including SDN architectures.
Physical Infrastructure	It provides end-to-end physical infrastructure solutions to support multiple business growth activities such as branch openings, datacenter extensions, and workspace transformations.

#### Partnerships (representative list)

Partner name	Details of the partnership
Fortinet	Offers Fortinet's security-driven networking solutions including Secure SD-WAN solution for its clients.
Cisco	Employs Cisco's hardware, software, and maintenance services.
VMware	Leverages server virtualization, business continuity, desktop virtualization, hybrid cloud, management automation, management operations, mobility management, network virtualization, software-defined storage, and Software-Defined Data Center (SDDC).

Service provider has entered into partnerships and accreditations with HPE, Aruba, Networks, Brocade, F5 Networks, Dell, Arista, Juniper, VMware, and AMX.

#### Investments and recent activities (representative list)

Theme	Details of the investment
Acquisitions	Acquired company x, a value-added reseller, will increase its European footprint by helping it to expand into the Switzerland market.
Acquisitions	It acquired Y which added sourcing and professional services capabilities to Computacenter's existing managed service business within the United States.
Acquisitions	Acquired Z, a value-added reseller, will help increase its local presence in Netherlands and enhance service offerings.

# Research calendar

## Cloud and Infrastructure Services

■ Published
 ■ Planned
 ■ Current release

### Flagship CIS reports

	Release date
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
<b>Software-Defined Wide Area Network (SD-WAN) Services Provider Compendium 2022</b>	<b>January 2022</b>
State of the Market: IT Infrastructure Services	Q1 2022

### 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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### Dallas (Headquarters)

[info@everestgrp.com](mailto:info@everestgrp.com)  
+1-214-451-3000

### Bangalore

[india@everestgrp.com](mailto:india@everestgrp.com)  
+91-80-61463500

### Delhi

[india@everestgrp.com](mailto:india@everestgrp.com)  
+91-124-496-1000

### London

[unitedkingdom@everestgrp.com](mailto:unitedkingdom@everestgrp.com)  
+44-207-129-1318

### Toronto

[canada@everestgrp.com](mailto:canada@everestgrp.com)  
+1-647-557-3475

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