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SD-WAN Managed Services 2021–2022 RadarView

Enabling business agility and digital transformation at speed with SD-WAN

Report Excerpt

December 2021

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About the report





SD-WAN adoption is rising as it has evolved from a technology designed to reduce costs and enhance operational efficiency to being a driver of enterprise digital transformation. Large businesses with a global presence are leading the adoption because of increasing use of cloud and digital services.



SD-WAN in convergence with 5G is set to disrupt the wide area network (WAN) connectivity models. With a surge in cyberattacks, zero-trust security has become a priority for enterprises. This has increased the adoption of the Secure Access Service Edge (SASE)-based security model.



SD-WAN Managed Services 2021–2022 RadarView aims to provide a view into market trends and developments and best practices to help build a granular understanding of the SD-WAN ecosystem. We also provide our recommendations for enterprises and detailed information on the key players in the market.



Avasant evaluated over 40 providers using a rigorous methodology across three key dimensions: practice maturity, partner ecosystem, and investments and innovations. It recognized 25 vendors that brought the most value to the market over the last 12 months.



This report also highlights key trends in the market and Avasant's viewpoint on the road ahead for enterprises leveraging managed SD-WAN services over the next 12 to 18 months.

Defining SD-WAN Managed Services



Applying SDN technology to connect an overlay network of enabled devices to an underlay infrastructure





Executive summary



Key SD-WAN services trends shaping the market

SD-WAN adoption is rising owing to rapid adoption of cloud and digital services	SD-WAN has become a key pillar of post-pandemic enterprise digital transformation, with 25% of organizations are investing and 29% of organizations are considering investing in the technology. Large organizations with a global presence are leading the adoption. As per the Computer Economics <i>Technology Trends 2021</i> report, 52% of large organizations have deployed SD-WAN while 42% are implementing or expanding the use of this technology.
The public sector witnessed the highest growth in SD-WAN adoption	The public sector (67%) has the highest growth in adoption, followed by healthcare and life sciences (38%) and retail and CPG (28%). Manufacturing continues to lead adoption, accounting for one-fifth of SD-WAN implementations in the 12 months ending September 2021. Increasing adoption of cloud services and IoT (further accelerated by the pandemic) and demand for higher network bandwidth are driving the growth of SD-WAN in public sector enterprises.
Convergence of SD- WAN & 5G technology enabling new connectivity models	Because of higher speeds and lower latency, 69% of enterprises realize the potential of 5G. About 15% of businesses have been building 5G solutions. Convergence of SD-WAN and 5G is set to disrupt enterprise WAN connectivity as it can supplement or, in some cases, replace traditional branch network connectivity (MPLS/internet broadband). 5G links are simple and can be provisioned in branch locations quickly.
SASE adoption gaining traction as enterprises secure cloud-based architectures	Rapid transition to remote/hybrid working and the need to deliver cloud-based applications to a distributed workforce, are among the reasons there has been an 85% increase in cyberattacks since March 2020. As security becomes a priority, SASE adoption is gaining prominence among enterprises. SASE benefits include identity-based zero-trust network access, reduced TCO by eliminating additional security appliances and hardware, and enhanced workforce performance.



SD-WAN adoption: The path forward

Choose a value-	 Businesses should choose SD-WAN to lay a foundation for business sustainability and transformation. Creating a structured business case should be the first step in an enterprise SD-WAN migration journey.
for migration to SD- WAN	 SD-WAN solutions meet the challenges and address the growing need for cloud-based applications. As software-as-a-service (SaaS) applications are designed to be much nimbler and have more efficient consumption methods, they need a modern internet-centric network solution, SD-WAN, to truly shine.
Carefully evaluate SD-WAN platforms and managed services providers	 With numerous SD-WAN platform vendors in the market, enterprises need to evaluate critical features such as zero-touch provisioning and application awareness before selecting the right SD-WAN platform for their businesses. Ability to offer end-to-end managed services, ease of deployment, and flexible pricing are the top three factors to consider when selecting a managed services provider.
Choose the right deployment model based on cost and control trade-off	 As SD-WAN solutions vary widely in terms of their architecture and the way they interoperate with the existing infrastructure, enterprises should select the deployment model based on their needs and criteria such as reliability, optimization, security, and cost. Organizations can select one or more available deployment models, including do it yourself (DIY), comanaged, fully managed, and SD-WAN as a service.
Proactively address challenges associated with SD- WAN implementation	 Like every other technology implementation, SD-WAN comes with its own set of challenges. Complex network environments, SD-WAN platform complexity, incorporation of automation, security control and compliance, and lack of expertise in designing and deploying POCs are some concerns. Enterprises need to proactively address these challenges to realize maximum benefits from their SD-WAN implementation.

Avasant recognizes 25 top-tier service providers offering managed SD-WAN services









Lay of the land

the technology Key drivers

- The pandemic accelerated the use of public and private SaaS/PaaS/laaS services.
- With the shift to remote/hybrid working, enterprises are focusing on cloud deployments of network functions and resources such as connectivity, VPNs, and security.
- Network and application performance have become key for organizations to maintain high levels of employee productivity and end-user satisfaction.
- SD-WAN solution can optimize traffic with dynamic protocols to speed up the application performance.
- Surge of network traffic on traditional WAN infrastructure is resulting in increase in operating cost for enterprise.
- SD-WAN solutions offer the flexibility to pick and mix access technologies, carriers, hardware, and other network components, to reduce cost of operation.

SD-WAN has become a key pillar of post-pandemic enterprise digital transformation

Adoption is rising, with 25% of organizations are investing and 29% of organizations are considering investing in



Enterprise SD-WAN adoption stages



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Large organizations with a global presence are leading the adoption due to increasing use of cloud and digital services



52% of large organizations have deployed SD-WAN, and 42% are implementing or expanding the use of this technology.

SD-WAN adoption and investment rates by organization size



Computer Economics defines organization size based on revenue: Small (\$20 million–\$350 million), midsize (\$350 million–\$1 billion), and large (more than \$1 billion) Sample enterprise implementation examples

	MARS	Mars collaborated with Orange Business Services to implement its Flexible SD-WAN, LAN, and security solutions to connect its more than 125K associates across 460 sites in over 80 countries.
	HANES Brands Inc	Hanes Australasia, with 500 retail stores across five countries, collaborated with Telstra to design and implement a Cisco Meraki-managed SD-WAN solution.
	PHOENIX	PHOENIX Pharmahandel deployed SD-WAN solutions across its 152 distribution centers to enable medicines and health products to reach quickly and safely in 26 European countries.
	JENSEN HUGHES	Jensen Hughes deployed a VMware SD-WAN solution, managed by GTT, and onboarded its sites in the US as well as remote branches in Europe, Asia, and the Middle East.

*Indicative list of examples



Manufacturing constituted one-fifth of SD-WAN implementations during the last 12 months





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The public sector had the highest growth in adoption followed RADARVIEW by healthcare and life sciences and retail and CPG

Top three indus	stries with highest YOY growth in SD-WAN adoption	Enterprise implementation example
67% Public sector	 The public sector has been slow to adopt SD-WAN because of compliance and security standards. However, increasing cloud services and IoT adoption (accelerated by the pandemic), and demand for higher bandwidth, are forcing public sector enterprises to reassess their strategies around SD-WAN adoption. 	AT&T Business implemented an SD-WAN solution with VMware devices for New Zealand Trade and Enterprise, with 700 employees in 50 locations across 30 countries, to set up a reliable and secure network infrastructure.
	The network infrastructure of healthcare and life	Saber Healthcare Group with over 120
38% Healthcare and life sciences	 sciences enterprises faced a lot of challenges during the pandemic because of increased delivery of remote/tele healthcare services. These enterprises are adopting SD-WAN to achieve better network uptime and bandwidth and enhanced application performance. 	facilities, migrated from legacy MPLS to SD-WAN by implementing a VMware VeloCloud SD-WAN solution. This significantly increased network visibility, management, and QoS.
	Post pandemic, retail enterprises are undergoing	Lotte Group, with more than 50 affiliates
28% Retail and CPG	 massive digital transformation initiatives. Adoption of SD-WAN is helping these enterprises with use cases such as setting up pop-up stores and AR/VR-enabled shopping by providing better network bandwidth and network uptime. LOTTE 	and R&D centers, implemented a Cisco SD-WAN solution to streamline IT line costs and centralize control of 17 domestic locations with greater flexibility and reliability.

Implementation of SD-WAN is driving business outcomes for enterprises





Technology risk-reward analysis

Key business outcomes

Reduction in network OPEX and increased cost savings

Sample case study

An American clothing and accessories retailer collaborated with HCL to migrate 2,100 sites across Canada, North America, and Mexico to Cisco Viptela SD-WAN. This resulted in a 60%– 70% annual cost savings.

Increased network availability and enhanced application performance TATA Communications deployed managed SD-WAN with dual MPLS and internet links for a global materials solutions provider, significantly improving application performance and network performance enhancement.

Lower network complexity and increased agility and security Lumen implemented a managed Versa Network SD-WAN solution for a US-based transportation company with sites in 30 states. This enhanced network performance and reliability, control, and visibility of all sites.

*Indicative list of examples

ROI success rate: The percentage of adopters that break even or obtain positive ROI on their investment **Cost success rate**: The percentage of adopters that came in at or at less than budget for total cost of ownership (TCO) The chart ranks each technology by economic experience, which is the combination of the two.

Convergence of SD-WAN and 5G is set to disrupt enterprise WAN connectivity models



About 18% of enterprises are implementing or have 5G in place, while 69% see a potential use for the technology.

Benefits of SD-WAN with 5G

Higher data speed, lower latency, and greater bandwidth

- 5G can cut latency in communications to as low as 1 millisecond end-to-end. It can reach an average speed up to 100bps, which is about 10x faster than its predecessor, 4G.
- 5G can support around 1M devices per square km, while 4G can support around 4K devices per square km.

Replace/support traditional network connectivity

- Wireless connection can supplement or, in some cases, replace traditional branch network connectivity (MPLS/internet broadband).
- Wireless connection links are simple and can be provisioned in branch locations quickly.

Reduced operational cost and increased savings

• With SD-WAN and 5G, enterprises can realize lower operational costs because of transport independence across different connect types and increased WAN bandwidth capacity.



SASE adoption is increasing as security becomes a priority for RADARVIEW enterprises in the post-pandemic era

Due to the need to deliver cloud-based applications and resources to a distributed workforce, there has been an 85% increase in cyberattacks since March 2020. This is forcing enterprises to adopt robust zero-trust security models to secure their infrastructure

What is Secure Access Service Edge (SASE)?

- SASE combines network and security functions with WAN capabilities and is delivered as a single cloud-delivered offering.
- Security services are integrated including firewall as a service (FWaaS), secure web gateway (SWG), cloud access security broker (CASB), and zero-trust network access (ZTNA).
- Cannot have SASE without SD-WAN, since SD-WAN is one of the components of the SASE framework.

SASE key benefits

- Ensures identity-based zero-trust network access by offering flexible and consistent security and reducing network complexities.
- Reduces the total cost of ownership as SASE minimizes or, in some cases, eliminates the use of additional security appliances and hardware.
- Being a cloud-delivered offering, SASE helps enhance workforce performance and productivity, irrespective of their work locations.

SASE ecosystem providers

paloalto[®] F**ERTINET**, CATO *Szscaler* **WR**Ware[®] (Aramai Merracuda.







Managed services providers are expanding and augmenting RADARVIEW^{**} their SD-WAN services offerings

	Key areas	Sample investments by MSPs in the last 12–15 months		
	Adding services and support for new SD-WAN and SASE solutions	BT	In the last 12 months, BT launched managed SD- WAN services based on VMware VeloCloud and Fortinet SD-WAN solutions.	
		wipro	Wipro added the Palo Alto Prisma Access SASE solution to its SD-WAN service offering to deliver managed SASE services.	
f the overall MSP estment budget is ing toward IP and set development the next 12–15 months	Augmenting network automation and orchestration capabilities	HCL	HCL continues to invest in its AI-based network automation tool, DRYiCE NetBot, to perform intelligent network operations.	
		IBM.	IBM integrated its Cloud Network Intelligent Control Center (CNICC) with its MultiNetwork Intelligent SD-WAN offering to deliver network automation and orchestration capabilities.	
	Developing industry-specific solutions	ST&T	AI&I launched a Cisco SD-WAN solution with Federal Information Security Modernization Act (FISMA) compliance for public sector customers.	
		TATA COMMUNICATIONS	TCL has identified four industry cohorts (production- focused businesses, financial institutions, knowledge-based companies, and last mile enablers) to develop verticalized SD-WAN solutions.	
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The path forward

Enterprises need to prioritize business factors over technology (RADARVIEW " while considering migration to SD-WAN

A structured business case is the first step in a digital-first enterprise SD-WAN migration journey.



Build case for SD-WAN based on delivering real enterprise value Calculate the cost of financial engineering of the SD-WAN service and long-term benefits

Evaluate managing own SD-WAN in-house or opt for managed services providers

- Showcase strategy to replace obsolete hardware and associated support systems
- Identify opportunities for revenue
 upsell after network
 transformation
- Present cost reduction analysis, including network maintenance, technical sites, and operations
- Calculate transition risks during the optimization process

- Evaluate cost for network transformation or modifying CPE
- Calculate the impact of revenue loss while decommissioning legacy networks
- Calculate cost savings across router operational expenses, firewall purchases, and WAN optimization
- Contact the potential vendor for a quote and calculate pricing based on requirements

- Choose a DIY or managed service provider model evaluating all the TCO elements of DIY and OPEX-based services
- For DIY, consider investments in IT, resourcing, skilling, and people
- For managed services, calculate costs for additional functionality and scaling up

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Consider connectivity to cloud/SaaS services for the application ecosystem

Evaluate platform features based on needs while selecting the SD-WAN vendor





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SD-WAN managed services provider evaluation criteria for enterprises

RADARVIEW[™]

End-to-end service offerings followed by ease of deployment and pricing are the top criteria for enterprises.

Typical SD-WAN vendor evaluation criteria



offerings

- Start with preparing a clear business case
- Visibility into network underlays

Transition/ease of deployment

- POC and pilot deployment with test and validation programs
- Integrated process automation to ease implementation

Pricing

- Low-cost customer edge devices
- Savings by reducing infrastructure costs





Geographical spread of points of presence

- Distributed PoPs provide high performance and are secure
- Better accessibility and visibility Quality of managed services
- Service availability
- Packet delivery ratio •
- Transit delay



Network Diversity

- Better orchestration, routing, and bandwidth/availability
- Centralized policy management
- Improved transport service

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Enterprises must choose the right deployment model



Do it yourself/third- party integrator	Comanaged	Fully managed	SD-WAN as a Service
 Enterprise IT or third-party integrator purchases and deploys the SD-WAN appliances Enterprises retain control of procurement and design, and eliminate MSP-related costs Resource-intensive, and a high level of expertise required within the enterprise 	 Service provider/system integrator deploys and manages SD-WAN Enterprises partially configure and self- manage applications and security policies Appropriate SLAs for uptime & performance May require customers to pay for additional functionalities 	 MSP usually partners with an SD-WAN vendor to add SD-WAN services to its portfolio Highly dependent on the responsiveness of a single MSP contract Pricing is available in one-year/multiyear service Helps reduce IT staff costs for the enterprises 	 Provider usually makes SD-WAN service available on its own private network Customer is responsible for managing the service, and provides flexibility to scale with a lower TCO & zero CAPEX Works with applications at on-premises, cloud, & SaaS with deployment in hours or days

SD-WAN solutions vary widely in terms of their architecture and how they interoperate with existing infrastructure.

Proactively address challenges associated with SD-WAN implementation



Severity	Typical challenges	How to resolve
Complex environments	 Complexity of building a next-generation WAN that includes multicloud connectivity, edge and cloud security, network and application optimization, and hybrid connectivity Managing multiple WAN links and existing MPLS Compatibility issues and complexity in design documentation 	 Pilot deployment with a predefined success principle to ensure 100% alignment with customer expectations Standardized design templates to deliver solutions in a repeatable method Agile and accurate automated network
Embedding automation	 Incorporating automation technologies for automated provisioning, policy mirroring, topology mapping, network self-healing, and providing a single-pane window of management for centralized process of input-based auto- remediation to the deployment and operation 	 Use a dedicated list of automation tools and frameworks to enable automation. Take advantage of centers of excellence (CoEs) and innovation labs Orchestrate between multiple systems and allow enterprises to automate time-consuming changes and configuration tasks and execute self-healing workflows
Security control and compliance	 Direct internet access for applications such as O365 is increasing the security risk level Accessing public cloud and data center applications directly via internet, it becomes pivotal for enterprises to design a tiered approach towards ensuring security 	 SD-WAN security uses elements such as IPSEC, VPN tunnel, next-generation firewalls (NGFWs), and microsegmentation of application traffic SASE model enables enterprises to have integrated security and best of security enforcement with distributed policy enforcement points
Deploying POCs and lack of expertise	 SD-WAN is a fast-evolving space, and not all customers have in-house experts who can design, deploy, and manage a complex environment on a global scale Most SD-WAN customers are unclear, and deployments start with a limited physical deployment (POC) to understand the actual benefits 	 Experts evaluate vendors, codesign the network, conduct POCs, build the right deployment model, design the migration strategy, and enable roll out and life cycle management Tracking the procurement progress aligned with change management and actual deployment



RadarView overview

Avasant's SD-WAN Managed Services RadarView assesses service providers across three critical dimensions:



Practice maturity	 This dimension considers the current state of the service provider's SD-WAN managed services practice in terms of its strategic importance to the provider, the maturity of its offerings and capabilities, and client engagements. The width and depth of the client base, usage of proprietary/outsourced tools and platforms, and quality of talent and execution capability are all important factors that contribute to this dimension.
Partner ecosystem	 This dimension typically assesses the nature of the ecosystem partnerships that the provider has entered into, the objective of the partnership (codevelopment and co-innovation), and its engagement with solution providers, startup communities, and industry associations. The kind of joint development programs around offerings, go-to-market approaches, and the overall depth in partnerships are all important aspects.
	This dimension measures the strategic direction of investments and the resultant innevations in its
Investments and innovation	 This dimension measures the strategic direction of investments and the resultant innovations in its offerings and commercial model and how it aligns with the future direction of the industry. Overall strategic investments, both organic and inorganic, in capability and offering growth, technology development, human capital development, and thought leadership, along with the innovations that the service provider develops with its partners, are critical aspects.

Research methodology and coverage



Avasant based its analysis on several sources:

Public disclosures	Publicly available information such as Securities and Exchange Commission (SEC) filings, annual reports, quarterly earnings calls, and executive interviews and statements
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Market			
interactions			

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Discussions with enterprise executives leading digital initiatives and influencing service provider selection and engagement

Provider Inputs collected through an online survey and structured briefings in June–September 2021







SD-WAN Managed Services 2021–2022 RadarView

Reading the RadarView



Avasant has recognized SD-WAN managed services providers in four classifications:



2021-2022

Leaders show consistent excellence across all the key dimensions of the RadarView assessment (practice maturity, partnership ecosystem, and investments and innovation) and have had a superior impact on the market as a whole. These service providers have shown true creativity and innovation and have established trends and best practices for the industry. These service providers have proven their commitment to the industry and are recognized as thought leaders that set the standard for the rest of the industry to follow. Leaders display a superior quality of execution and a reliable depth and breadth across verticals.

Innovators show a penchant for reinventing concepts and avenues, changing the very nature of how things are done from the ground up. Unlike leaders, innovators have chosen to dominate in a few select areas or industries and distinguish themselves based on superior innovation. These radicals are always hungry to create pioneering advancements in the industry and are actively sought after as trailblazers redefining the rules of the game.



Disruptors enjoy inverting established norms and developing novel approaches that invigorate the industry. These service providers choose to have a razor-sharp focus on a few specific areas and address those at a high level of granularity and commitment, which results in tectonic shifts. While disruptors might not have the consistent depth and breadth across many verticals like leaders or the innovation capabilities of innovators, they exhibit superior capabilities in their areas of focus.



Challengers strive to break the mold and develop groundbreaking techniques, technologies, and methodologies on their way to establishing their unique position. While they may not have the scale as service providers in other categories, challengers are eager and nimble and use their high speed of execution to great effect as they scale heights in the industry. Challengers have a track record of delivering quality projects for their most demanding Global 2000 clients. In select areas and industries, challengers might have capabilities that match or exceed those of the service providers in other categories.

SD-WAN Managed Services 2021–2022 RadarView







Tata Communications profile

Tata Communications: RadarView profile



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ΤΛΤΛ	Practice overview	Client case studies		
COMMUNICATIONS	 Practice size: 4,000+ Active since: 2017 Active clients: NA Externally certified resources: NA Delivery highlights: Managed its SD-WAN offering in 130+ countries 560+ Global points of presence (PoPs) >100% SD-WAN revenue growth 2020–2021 	 Client case studies To transform global connectivity for more than 50 locations of a European n a cloud-ready network, TCL implemented managed SD-WAN based on Ver IZO SDWAN. This included the underlay of IZO WAN circuits in major location circuits in China and India. It significantly reduced costs and enhanced provers. A Singapore-based airline decided to increase its global contact centers from seven countries with two data centers. TCL provided MPLS links via a manage SD-WAN solution with vEdge 1000 and vEdge 2000 routers. The service-level of 99.5% availability was achieved by TCL for both underlay and overlay links. TATA Communications deployed managed SD-WAN services with dual MPL links for a global materials solutions provider, resulting in a significant improv application performance and network enhancement. It also boosted user € 99.9% network uptime and adherence to SLAs. 		pean manufacturer with on Versa Networks and ocations with MPLS ed productivity. Inters from four to nine in managed Cisco Viptela e-level agreement (SLA) day links. al MPLS and internet mprovement in d user experience due to
Practice maturity $\star \star \star \star \star$	Key IP and assets	Key partnerships	Sample clients	Industry coverage
Partnership ecosystem $\star \star \star \star$ Investments & innovation $\star \star \star \star \star$	 IZO[™] SDWAN: A solution for end-to-end managed SD-WAN services 	Platform/technology partners	 A European manufacturer of electrical distribution systems An Indian fast-food franchise 	Aerospace & defense Banking Financial services
Provides end-to-end managed services through IZO™ SDWAN. Invests in developing SASE propositions and building verticalized solutions.	 TC^x portal: A self-service portal with end-to-end network monitoring and reporting IZO Experience Portal: A platform for virtual simulation of a customer's environment A thin branch, CPE-based solution with multiple SD-WAN features 	CISCO CISCO CISCO CISCO AZURE Security partners and others COZSCOLORY DOLLEMC ONETFOUNDRY ADJANTECH	 A Singapore-based airline A US-based bakery services company A European oil and gas company A global materials solutions provider A European brewery 	Government Healthcare & life sciences High-tech Insurance Manufacturing Nonprofits Retail & CPG Telecom, media & entertainment Travel & transportation Utilities & resources

Darker color indicates higher industry concentration:

Tata Communications: RadarView profile

Analyst insights

Practice maturity

- TATA Communications Limited (TCL), a part of the Tata Group, started providing SD-WAN services in 2017. It currently offers a breadth of managed SD-WAN services through IZO[™] SDWAN, offering a fully-/co-managed model to its enterprise customers globally across 130+ countries. The offering is augmented by other SD-WAN platforms in its portfolio, including Cisco (Viptela and Meraki), Versa Networks, and Fortinet SD-WAN.
- Through IZO[™] Private Connect, TCL offers connectivity to major cloud services providers, including AWS, Microsoft Azure, GCP, IBM, Oracle, SAP, and Alibaba Cloud. For Azure, it offers Managed Azure Virtual WAN as part of its IZO[™] SDWAN offering.
- TCL offers centralized orchestration and management of SD-WAN network (including third-party) through TC[×] Platform. This can be integrated with APIs and provides customers with a self-service portal. This supports multiple SD-WAN platforms and can be bundled with Tata products, including security.
- TCL has strong coverage and a customer base in APAC, UK, and Europe, contributing ~50% and ~36% to its total SD-WAN managed services revenue.
 Manufacturing, hi-tech, retail, and CPG are key industries contributing ~75% of the total managed services revenue.

Partnership ecosystem

- TCL has strategic alliances with SD-WAN hardware and software providers (Cisco-Viptela and Meraki, Versa Networks, and Fortinet), and security and firewall services (Zscaler, Palo Alto). For CPE and network appliances, it partners with OEMs such Advantech, Lanner, and Dell.
- TCL is collaborating with NetFoundry (spun off from TCL in 2019) for an on-demand application-aware WAN solution to address zero trust remote access and SaaS optimization use cases.
- TCL and TCS have a strategic partnership as part of the Tata group. They jointly partner across industry verticals providing technologies like network, cloud computing, unified communications, automation, AI, big data, analytics, and IoT.

Investments and innovation

- TCL developed SPAED (Secure Private Access Edge Devices) leveraging NetFoundry technology. It utilizes this to address use cases such as providing network connectivity to small retail format/franchise store, pop-up retail store, satellite healthcare center, and remote workspace.
- Some of the focus areas for TCL in the next 12-15 months include delivering BYON managed services and SD-WAN, developing SASE propositions, network management by predictive monitoring and analysis leveraging AI/ML, expanding Fortinet partnership, and addressing mid-market segments.
- TCL has identified four industry cohorts (production-focused business, financial institutions, knowledge-based company, and last mile enablers), to develop verticalized solutions.

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Authors











Mark GaffneySwapnil BhatnagarShwetank SainiAbhishek NayakDirectorSenior Research DirectorResearch LeaderSenior AnalystMark.Gaffney@avasant.comswapnil.bhatnagar@avasant.comshwetank.saini@avasant.comabhishek.nayak@avasant.com



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Empowering Beyond

