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SD-WAN Managed Services 2022–2023 RadarView – Report Excerpt

Navigating network transformation with the convergence of SD-WAN and security

March 2023

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About the SD-WAN Managed Services 2022–2023 RadarView

1. After facing multiple challenges related to network security and automation, enterprises are now understanding the importance of network security in conjunction with SD-WAN implementation. Hence, they are opting for joint SD-WAN and SASE deals. However, businesses still face several challenges while implementing a software-defined network, and they rely on service provider innovation to address them.

2. Service providers, in response, are not only upgrading their SD-WAN capabilities continuously but also adding various network security-specific services such as SASE to their portfolio due to the increased demand from enterprise clients. Service providers are also trying to keep pace with market demands by investing in their innovation capabilities.

3. The *SD-WAN Managed Services 2022–2023 RadarView* aims to provide insights into the leading service providers offering managed SD-WAN services. It provides an analysis of provider capabilities in terms of their technology, domain, and delivery expertise to assist organizations in identifying strategic partners for their SD-WAN network transformation.

4. Avasant evaluated over 40 providers using a rigorous methodology across three key dimensions: practice maturity, partner ecosystem, and investments and innovation. It recognized 23 vendors that brought the most value to the managed SD-WAN services market over the past 12 months.

5. The report also provides a view of important market trends and developments to help build a granular understanding of the SD-WAN ecosystem. It provides insights into managed SD-WAN adoption by enterprise type, geography, and key industries as well as key network challenges faced by enterprises.

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Executive summary

Definition and scope of SD-WAN managed services

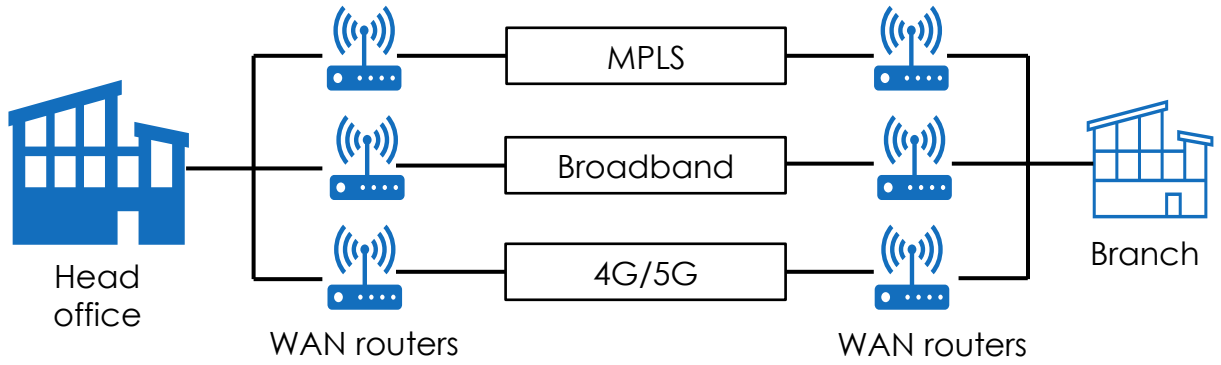
Key definitions

SD-WAN is an application of software-defined networking (SDN) technology that helps enterprises dynamically connect an overlay network of enabled devices to an underlay infrastructure capable of using various access technologies such as MPLS, Internet, xDSL, cellular technologies (4G/LTE, 5G) and satellite.

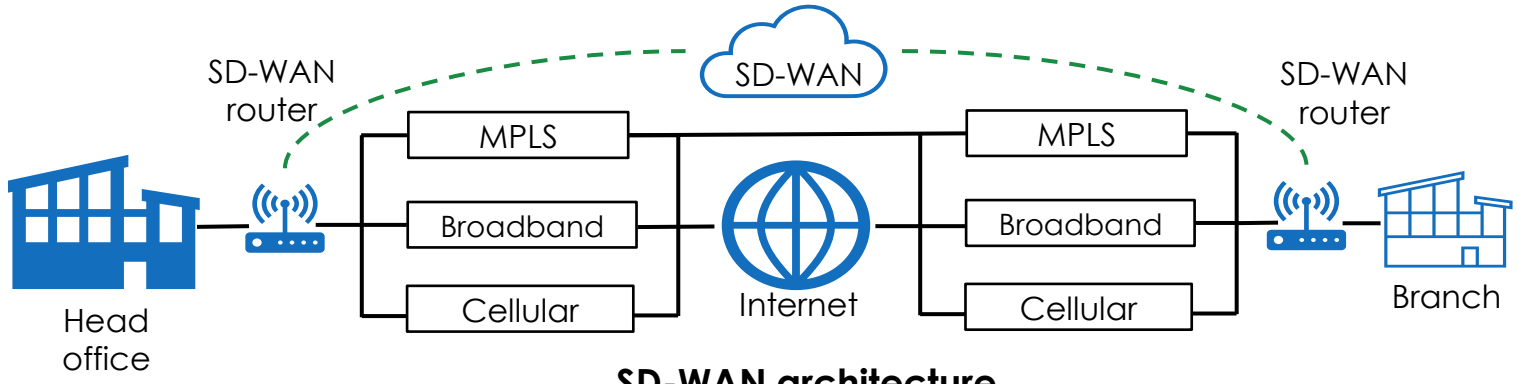
The SD-WAN Managed Services RadarView covers managed service providers (MSPs) offering end-to-end services, including network management, network security, performance management, and support of physical and virtual customer premises equipment in a multivendor environment.

With the remote and distributed work model becoming the norm, workplace security has become essential. SASE, with its increased focus on security, is gaining popularity as an integral part of the SD-WAN services portfolio. Although SASE incorporates elements such as content optimization, frontend web platforms, and data loss prevention (DLP), this report focuses on SASE's security capabilities and its position as an added service on top of SD-WAN managed services.

Shift from traditional WAN to SD-WAN to SASE

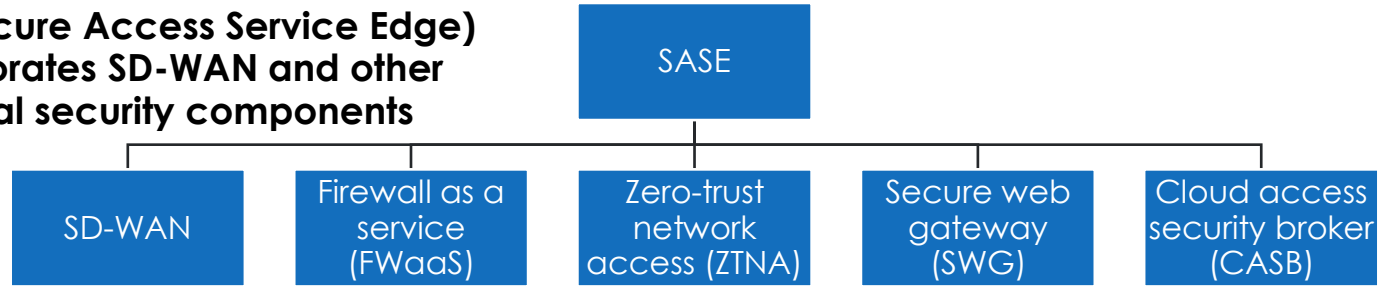


Traditional WAN architecture



SD-WAN architecture

SASE (Secure Access Service Edge) incorporates SD-WAN and other crucial security components



Key managed SD-WAN outsourcing trends

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SD-WAN has become central to enterprises, with remote work becoming a norm	• The normalization of remote work has led to managed SD-WAN services gaining traction across industries and geographies. While managed SD-WAN services have grown by about 40% from June 2021 to June 2022, the number of active clients has increased by about 34% within the same period. • Industries such as high-tech, manufacturing, healthcare and life sciences and emerging geographies such as LATAM and MEA are witnessing increased SD-WAN adoption.
Network security and automation issues drive SD-WAN and SASE deals	• Companies are increasingly facing challenges related to network security, automation, and application and policy optimization. These challenges include leaving firms susceptible to security threats and bad application performance, which hurt enterprise performance and profitability. • As a result, enterprises are opting for joint deals comprising SD-WAN and some components of network security.
SD-WAN adoption across geographies and industries sees a sharp rise	• Industries such as high-tech, manufacturing, healthcare and life sciences, and government saw increased SD-WAN adoption between 2021 and 2022, compared to the period before, with manufacturing continuing to account for over one-fifth of the total service provider revenue. • North America accounts for over 40% of the SD-WAN adoption, with a visible growth in the adoption of SD-WAN services across all geographies supported by investments by government and public bodies.
Legacy infrastructure and multivendor systems complicate the implementation	• Although the SD-WAN technology has garnered continued enterprise interest, its implementation faces multiple challenges. These include migration from legacy infrastructure to SD-WAN networks, coordination between multiple vendors across the SD-WAN value chain, talent shortage in the network security domain, and challenges in selecting the right SD-WAN solution. • Enterprises look toward innovations by service providers to address this broad range of problems.

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Key SD-WAN service provider trends shaping the market

Focusing on providing end-to-end managed SD-WAN offerings	• Service providers are providing end-to-end service offerings covering the entire SD-WAN value chain, including SD-WAN consulting and advisory, implementation and integration, orchestration and reporting, security and compliance, SD-WAN governance, and traffic optimization. • To cater to the increased demand for SD-WAN managed services, service providers have increased their full-time employees by about 22% from 2021 to 2022.
Strengthening SASE capabilities along with managed SD-WAN services	• Service providers continually invest in and provide SASE services and solutions on top of their existing SD-WAN solutions. These solutions are provided in conjunction with SASE partners to help businesses overcome crucial security challenges. • Service providers are expected to continue developing these security-specific services and solutions as enterprise demand for security increases in the future.
Developing a holistic partner ecosystem to strengthen network portfolio	• Service providers are partnering with SD-WAN and SASE hardware and platform providers and telecom and cloud providers to cover the underlay and overlay aspects of a managed SD-WAN service. • The service providers covered in this report, on average, have more than four SD-WAN-specific and more than three SASE and security-specific partnerships.
Continuous bolstering of SD-WAN and SASE services via innovation	• Service providers continue to bolster both their SD-WAN and SASE capabilities by investing in network innovation. Service providers, on average, spend almost 32% of their planned investments on developing assets and solutions for SD-WAN and SASE. • This is followed by human capital development, including certifications and training programs, on which service providers spend more than a fifth (about 22%) of their planned investments.

Avasant recognizes 23 top-tier service providers offering managed SD-WAN services

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Practice maturity

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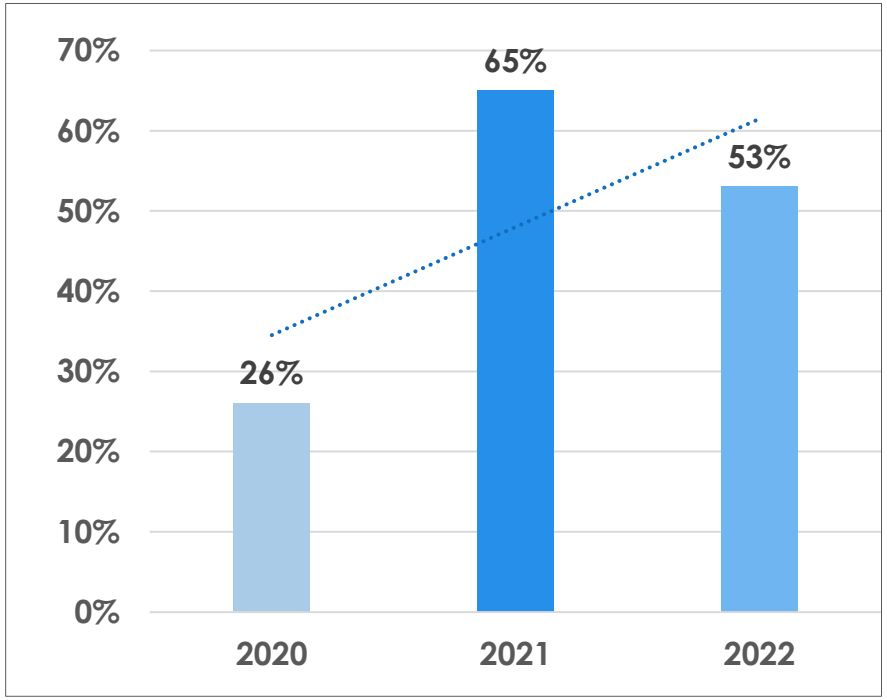
Key managed SD-WAN outsourcing trends

The remote/work-from-home model is driving the enterprise adoption of managed SD-WAN services



Percentage of enterprises offering at least 40% of the workforce a work-from-home/work-from-anywhere model

~40%
Growth in managed SD-WAN services between 2021 and 2022

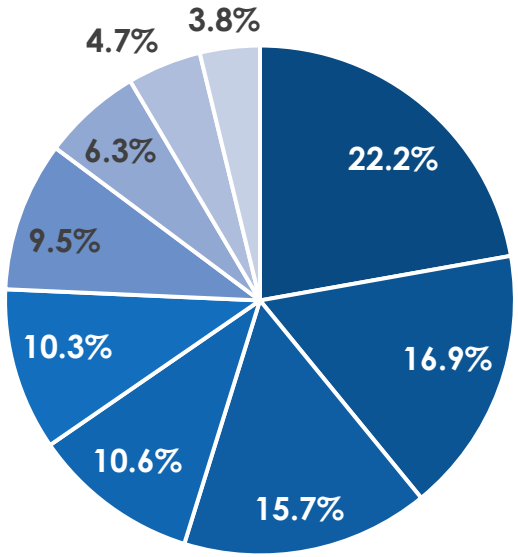
~34%
Growth in managed SD-WAN services clients between 2021 and 2022

- Despite enterprises now showing a preference for a return to the office for their employees, remote work still retains a lot of traction, compared to pre-pandemic levels.
- Remote work will continue to be a key work model for employees in enterprises driven by the following business drivers:
  - Onboarding and retention of talent
  - Improvement in employee experience and productivity
  - Management of an agile workforce and gig economy
  - Reduction in the cost of operations
  - Attainment of sustainability goals

Source: Avasant Research, Avasant Digital Workplace Services 2022 RadarView, Avasant SD-WAN Managed Services RadarView Survey, June–September 2022

As a result, managed SD-WAN services have been gaining traction across multiple industries and geographies

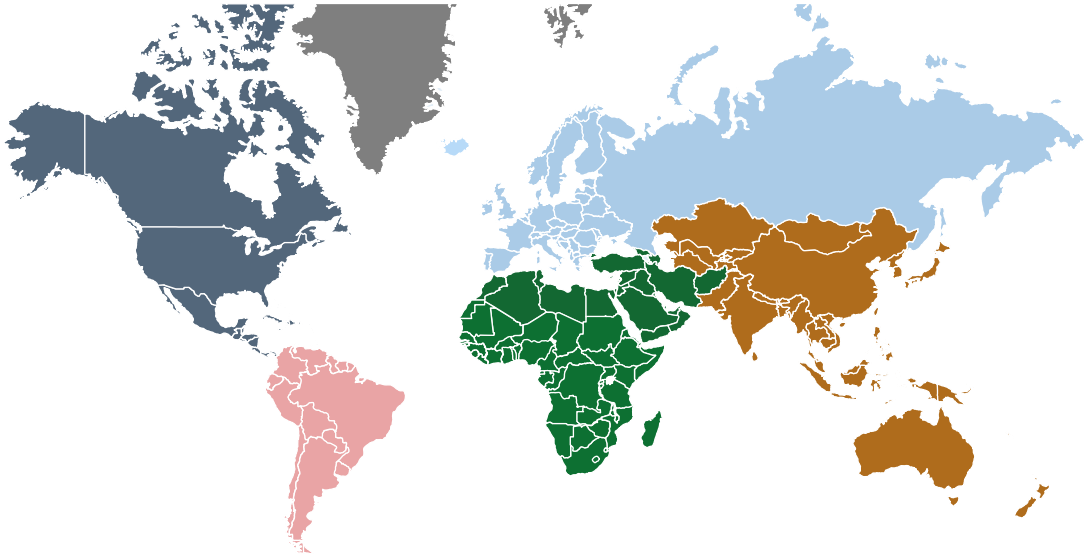
Percentage of SD-WAN revenue by industry

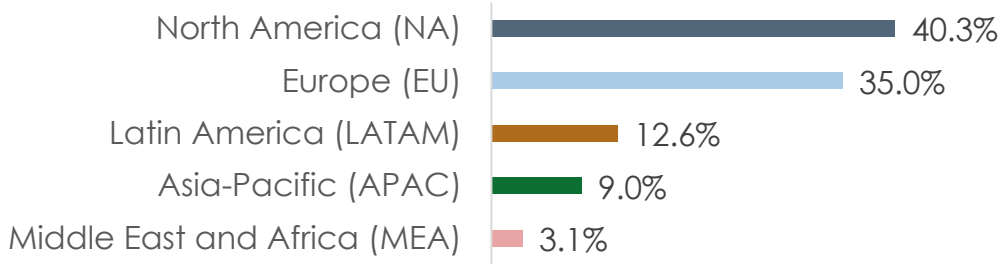


- Manufacturing
- BFSI
- Retail and CPG
- Utilities and resources
- Others
- High-tech
- Health care and life sciences
- Telecom, media and entertainment
- Government

Industries such as high-tech, manufacturing, and healthcare and life sciences are witnessing traction in managed SD-WAN services — they account for almost half of the managed SD-WAN services engagements.

Percentage of SD-WAN revenue by geography





Although North America leads the adoption of managed SD-WAN services, followed by Europe, emerging geographies such as LATAM and MEA are seeing an increase in the acceptance of these services.

Source: Avasant Research, Avasant SD-WAN Managed Services RadarView Survey, June–September 2022

Lack of automation and effective security policies force enterprises to consider security while implementing SD-WAN

The above challenges not only have an adverse effect on enterprises in terms of global and regional application performance but also lead to profitability and expenditure issues, which directly impact business continuity in the long run.

Lack of network automation

- Enterprises with predominantly manual processes for gathering traffic details and testing network functionality lose out on time and resources.
- This leads to employees not focusing on more strategic processes such as monitoring network availability, utilization data, or continuous improvement.

Lack of network security

- Businesses using cloud-based applications were unprepared for a quick transition amid the pandemic, which led to them facing security challenges such as a lack of network control and effective security policies.
- This has affected the user experience of remote employees, thereby reducing productivity.

Application, user, and policy optimization

- The increasing number of applications used by enterprises leads to challenges in application-level analysis and optimally designing, implementing, monitoring, and changing policies based on the network environment, user personas, and application types.
- These applications differ in bandwidth requirements and sensitivity to jitter and latency.

Source: Avasant Research, Avasant SD-WAN Managed Services RadarView Survey, June–September 2022

With network security gaining importance, enterprises are now looking for joint SD-WAN and SASE implementations

Network security is no longer an afterthought for businesses, making standalone SD-WAN deals a less attractive option.

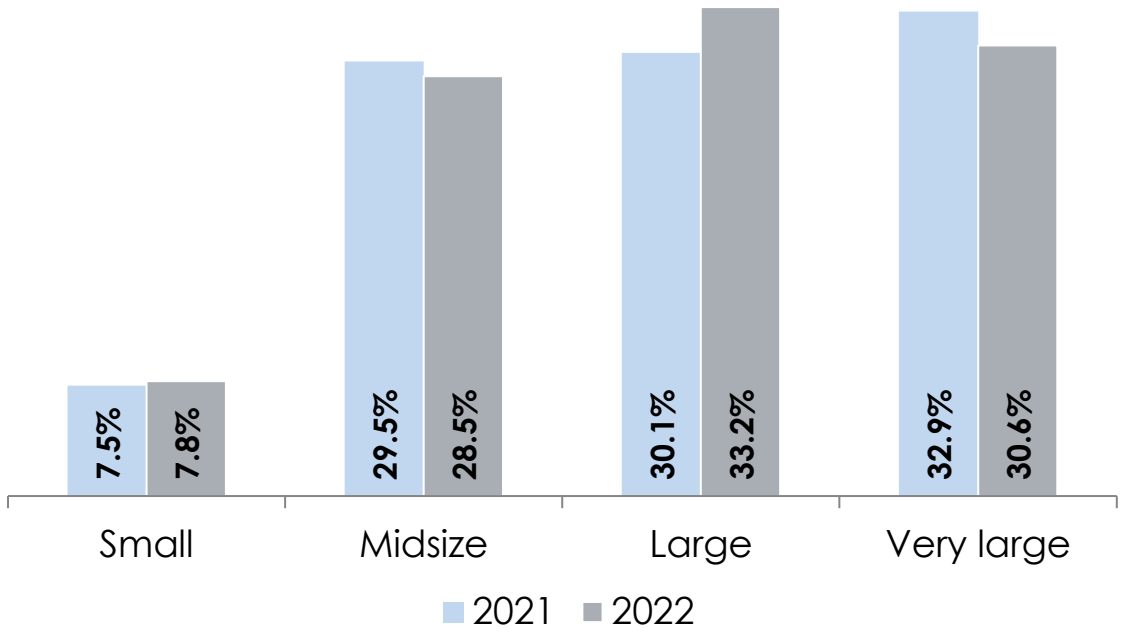
1.27M
Phishing attacks on enterprises in Q3 2022, as reported by APWG*, showing an increase of about 16%

Enterprise	Service provider	Examples of joint deals involving SD-WAN and network security
COCC	AT&T	• COCC Bank needed a flexible and configurable network with an automatic failover feature to replace its legacy network infrastructure, which was complicated and expensive. • AT&T utilized its SD-WAN offering with VeloCloud, which enhanced network security and performance and reduced costs.
A leading motorcycle manufacturing and distribution company	HCLTech	• The client faced CAPEX, OPEX, and network performance challenges due to its legacy MPLS connections, which lacked network virtualization capability. • HCLTech implemented its Transport Independent Site SD-WAN solution with Cisco Viptela to replace the client's existing WAN environment. • The solution led to a highly centralized, virtualized, agile network with SASE-enabled security.
OCEANAGOLD	orange Business Services	• OceanaGold was hosting many applications in the cloud as part of its ongoing digital transformation journey, which included moving away from its legacy MPLS infrastructure. • Orange provided its Flexible SD-WAN solution and Business VPN Galerie solution, enabling access to major cloud service providers. • This led to over 2,000 employees experiencing improved connectivity.
Australian wealth management group	TCS	• The client, after its separation from its parent group, wanted to expand to new growth markets. It also wanted to standardize its services and improve network security. • TCS analyzed the scope of requirements and built a software-defined global network using Fortinet SD-WAN and leveraged Netskope for network security. • This reduced the overall cost and risk and improved employee experience.

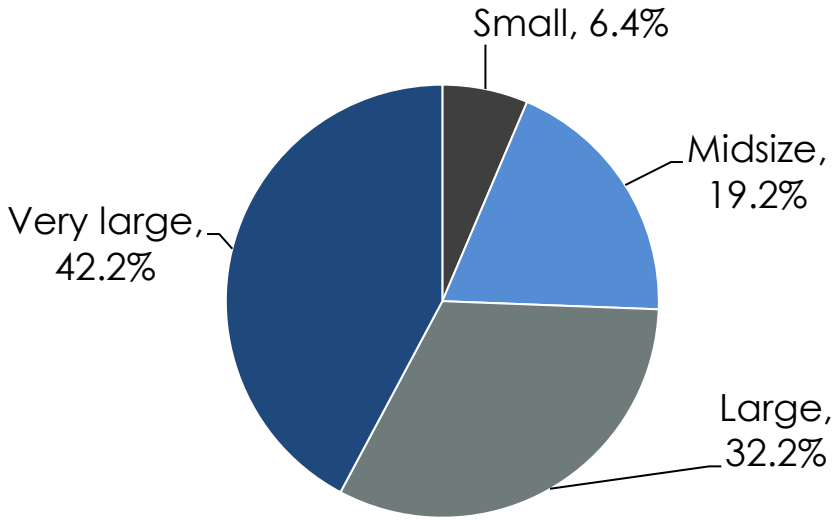
Source: Avasant Research, *Anti-Phishing Working Group (APWG), Avasant SD-WAN Managed Services RadarView Survey, June–September 2022

Large and very large enterprises lead the adoption of SD-WAN services supported by sizeable transformation budgets

Client distribution by enterprise type



Revenue distribution by enterprise type



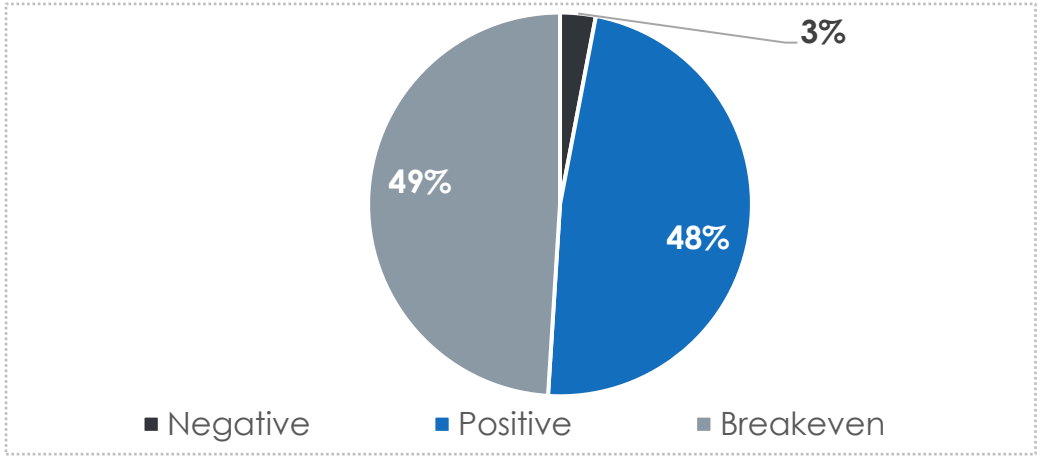
Small: **<$50M**
Midsize: **$50M–$500M**
Large: **$500M–$1B**
Very large: **>$1B revenue**

About **74%** share of managed SD-WAN services revenue comes from large and very large enterprises

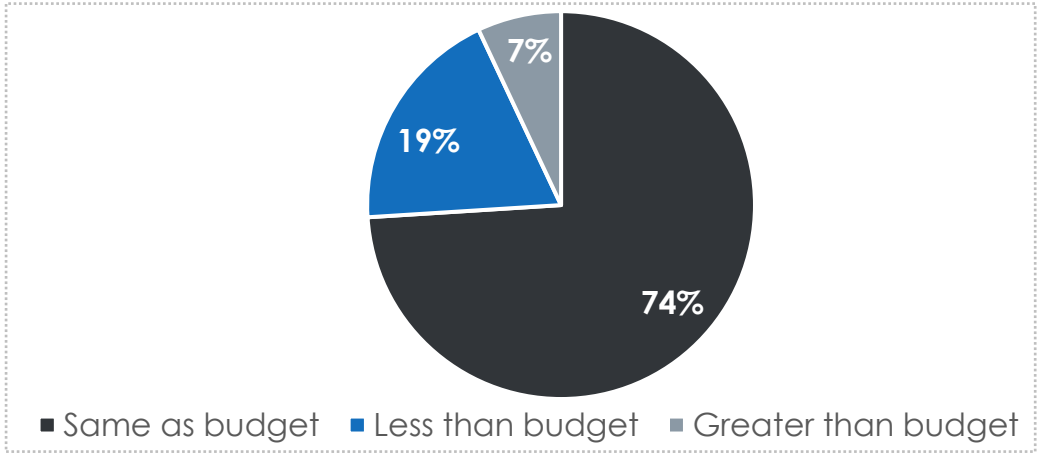
Source: Avasant Research, Avasant SD-WAN Managed Services RadarView Survey, June–September 2022

Better ROI and total cost of ownership (TCO) experience is driving satisfaction among enterprise clients

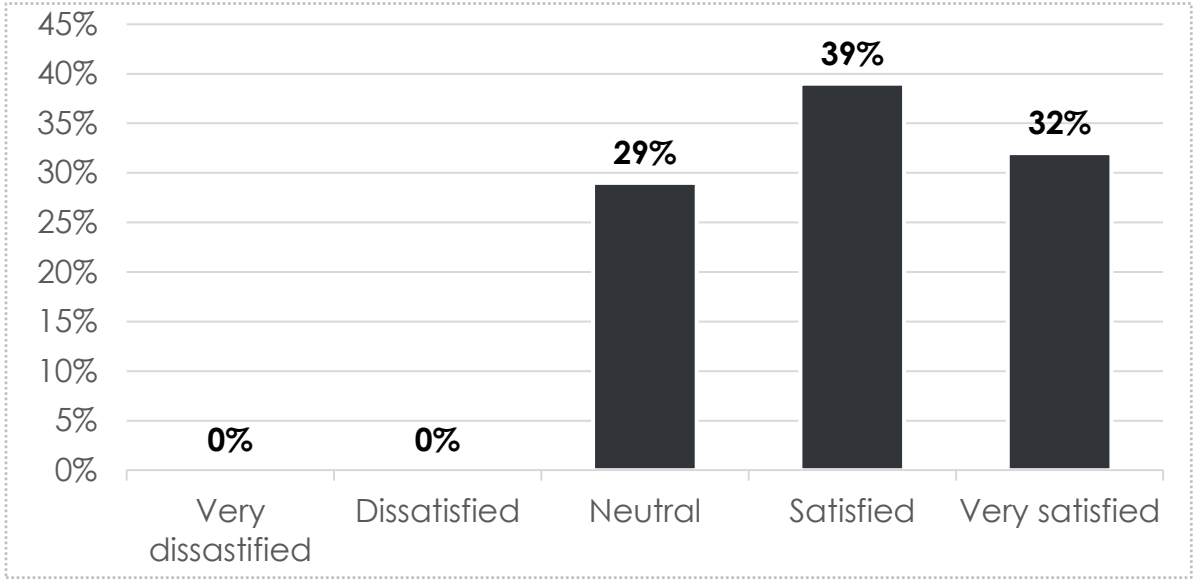
RoI experience of enterprise SD-WAN adopters



TCO experience of enterprise SD-WAN adopters



Satisfaction with SD-WAN



Key takeaway

- A majority (71%) of enterprises are either satisfied or very satisfied with their SD-WAN implementations, while no organizations are dissatisfied.
- Businesses' satisfaction with SD-WAN is not attributable only to cost efficiency but also to improvements in application performance and network flexibility.

Source: Avasant Research, Computer Economics SD-WAN Adoption and Customer Experience trends, Avasant SD-WAN Managed Services RadarView Survey, June–September 2022

Businesses face multiple challenges while implementing SD-WAN technology

Challenges	Description
Migration from the existing legacy infrastructure to SD-WAN networks	• While enterprise clients prefer to migrate to an SD-WAN network parallel to their already functioning legacy networks, they run the risk of service outage during migration, which leads to a shutdown of critical business operations. • Additionally, cost overruns and integration challenges can make SD-WAN adoption more difficult.
Vendor selection, management, and interoperability	• Enterprises lacking technical experience struggle to choose the right vendors for their network transformation projects. • Companies also struggle to coordinate between multiple vendors handling separate parts of the SD-WAN value chain. They find establishing coordination between telecom and ISP providers, OEM and hardware providers, and software and platform providers particularly challenging.
Challenge in selecting the right SD-WAN solution	• There are many complementary and competing products and services in the SD-WAN network space offered by service providers with very few differentiating factors. • This confuses enterprises, especially those looking to change only one product in their network stack. Therefore, companies must consider how a service provider's offering and partnership would fit into their existing network of hardware and OEM vendors.
Lack of skilled resources for SD-WAN transformation projects	• With the increase in the adoption of SASE and SD-WAN services, businesses face a lack of resources skilled in SASE/network security. • To address this issue, all leading security providers offer their own SASE certifications, such as Cato's SASE certification courses, Netskope's SASE Accreditation course, and Versa's SASE Essentials course.

Source: Avasant Research, Avasant SD-WAN Managed Services RadarView Survey, June–September 2022

Service providers are driving SD-WAN and SASE convergence and boosting the overall network performance

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Area of investment	Observations and general trends	An illustrative example	Description
Providing end-to-end service offerings	• These end-to-end service offerings cover the entire SD-WAN value chain, from consulting to security. • To cater to the increased demand, service providers have increased their employees by nearly 22% from 2021 to 2022.	HCLTech	• It uses its Nlighten framework to get a snapshot of existing client network infrastructure. It uses TIS, its cloud-agnostic SD-WAN framework, for network planning and optimization. • It also provides SASE consulting services, where it creates a SASE journey map for enterprises over a period of 18 months.
Bolstering innovation capabilities	• Almost 32% of planned investments are used for developing solutions for SD-WAN and SASE. • This is followed by human capital development, which accounts for 22% of planned investments.	TATA COMMUNICATIONS	• It plans to enhance its SASE offerings, productize SD-WAN services, and improve AI/ML usage in service automation. • It aims to onboard new technology partners and penetrate markets using new marketing campaigns and product introductions.
Strengthening SASE capabilities along with SD-WAN services	• Providers collaborate with SASE partners to offer solutions to help firms overcome security challenges. • The complexity of these solutions is expected to increase as providers invest more in their network security innovation capabilities.	wipro	• It has developed its ZTX framework with security partners; the framework helps with network, data, and device security. • Its #WANFreedom solution, despite being an SD-WAN solution, has security features embedded within it.
Providing global coverage via Points of Presence (PoPs)	• Service providers either maintain their own SD-WAN controllers and PoPs or leverage partnerships with telecom, SD-WAN OEMs, and security providers to provide underlay infrastructure to companies, enabling them to reduce infrastructure expenditure.	Telefónica	• It focuses on launching secure SD-WAN managed services in European geographies such as Germany and the UK and other key locations such as LATAM with its tier 1 technology partners, including Cisco, Aruba, and Fortinet. • It has a global network of over 100 IP PoPs.
Improving network automation and orchestration	• Service providers are enhancing their network automation and orchestration capabilities by either developing their network automation solutions or partnering with SD-WAN platform providers.	zensar	• It invests in developing its network automation platform, The Vinci, which helps provide operational analytics and consolidated dashboards and has self-healing network capabilities.

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To deliver end-to-end SD-WAN services to enterprises, service providers are building a robust partnership ecosystem

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Service providers, on average, have more than four SD-WAN-specific and more than three SASE/security-specific partnerships.

SD-WAN partners include Cisco (Viptela and Meraki), Palo Alto Networks (Prisma SD-WAN), Aruba (Silver Peak), and Fortinet (Fortinet Secure SD-WAN). SASE/security partners include Zscaler, Check Point, Fortinet, Symantec, Akamai, and Barracuda.

Source: Avasant Research, Avasant SD-WAN Managed Services RadarView Survey, June–September 2022

To meet the increasing network security needs of companies, technology providers are looking to make acquisitions

Technology provider	SD-WAN/SASE technology provider	Acquisition date	Description
Hewlett Packard Enterprise	axis	March 2023	The acquisition of Axis Security, which offers a security service edge (SSE) platform, will bolster HPE-owned Aruba's SD-WAN and network firewall offerings. The acquisition is scheduled to close by the end of the second quarter of 2023.
netskope	infiot	August 2022	Netskope's acquisition of Infiot will strengthen its SASE offerings and enable its customers to safely and securely access cloud-based applications, whether from home or branch offices.
Extreme networks	ipanema Technologies	September 2021	Through the acquisition of Ipanema, the cloud-native SD-WAN division of Infovista, Extreme Networks can expand its new cloud-managed SD-WAN and security solutions. The acquisition also allows Extreme Networks to build SASE features and provides it with a center of excellence in Europe.
FORTINET	OPAQ Networks	July 2020	Fortinet's acquisition of OPAQ Networks combined Fortinet's Security Fabric with OPAQ's zero-trust cloud architecture, thereby strengthening Fortinet's SASE services. This has strengthened Fortinet's SD-WAN solution as well.
paloalto NETWORKS	CLOUDGENIX NETWORKS WITHOUT NETWORKING	April 2020	The acquisition enabled Palo Alto to integrate CloudGenix's cloud-based SD-WAN solution into its own portfolio of SD-WAN and SASE offerings. This move enabled Palo Alto to provide enhanced security solutions for the workforce during the pandemic.

Source: Avasant Research, Avasant SD-WAN Managed Services RadarView Survey, June–September 2022

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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.
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 from sources such as Securities and Exchange Commission (SEC) filings, annual reports, quarterly earnings calls, and executive interviews and statements
Market interactions	Discussions with enterprise executives leading digital initiatives and influencing service provider selection and engagement
Provider inputs	Inputs collected through an online survey and structured briefings in June–September 2022

Of the over 40 SD-WAN managed services providers assessed, the following are the final 23 featured in the RadarView for 2022–2023:

aryaka, AT&T, BT, colt, Deutsche Telekom, DXC TECHNOLOGY, HCLTech, HUGHES, Infosys, kyndryl, LUMEN, MICROLAND, NTT, orange Business Services, TATA COMMUNICATIONS, tcs, Tech Mahindra, Telefónica, TELSTRA, verizon, windstream, wipro, zensar

Note: Assessments for Aryaka, AT&T, BT, Colt, Deutsche Telekom, Hughes, Infosys, Kyndryl, Lumen, Microland, NTT, Telstra, Verizon, and Windstream were conducted based on public disclosures and market interactions only.

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SD-WAN Managed Services 2022–2023 RadarView

Reading the RadarView

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

Leaders show consistent excellence across all key dimensions of the RadarView assessment (practice maturity, partner 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 established trends and best practices for the industry. They have proven their commitment to the industry and are recognized as thought leaders in the space 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 a few select areas or industries and distinguish themselves through 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 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 a unique position. While they may not have the scale of the 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 providers in other categories.

Avasant recognizes 23 top-tier service providers offering managed SD-WAN services

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Practice maturity

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Tata Communications Profile

Tata Communications: RadarView profile

TATA COMMUNICATIONS

Practice maturity ★★★★★

Partner ecosystem ★★★★

Investments and innovation ★★★★★

Leverages its IZO SDWAN platform to provide managed SD-WAN services. Focuses on improving and enhancing its SASE solutions.

Practice overview

- Practice size: 4,100+
- Active since: 2016
- Active clients: N/A
- Number of external certifications: N/A
- Delivery highlights: Provides managed SD-WAN services in 195+ countries

620+	>50%
Global points of presence	SD-WAN revenue growth, 2021–2022

Client case studies

- Implemented managed SD-WAN services for a global plant-based ingredients company with more than 46 locations across multiple geographies. It implemented cloud service gateways to help provide better performance and offered integrated site-level service level agreements. This led to a 99.9% network uptime, better productivity, and reduced costs.
- Helped a global corporate and fund solutions provider migrate from traditional networks to SD-WAN. It used a consultative approach and leveraged best practices along with its IZO Hybrid WAN solution to achieve an estimated 30% savings in operational expenses and a network uptime of 99.9%.
- Implemented a hybrid solution that included MPLS, SDWAN Select, and IZO Internet WAN for a global supplier of bakery ingredients. The solution was implemented at 53 global sites, including delivery centers in the USA, and resulted in increased scalability, security, flexibility, and cost-effectiveness for the client.

Key IP and assets

- IZO™ SDWAN: A solution for end-to-end SD-WAN services
- IZO SDWAN Assess: A module within IZO SDWAN providing network assessment services for enterprise clients
- TCx Platform: Unified platform enabling a digital experience from ordering to lifecycle management
- Virtual Experience Platform: A platform for simulating the customer's environment virtually

Key partnerships

Platform/technology partners

cisco, FORTINET, aws, silver peak, VERSA NETWORKS

Security partners and others

zscaler, CISILION, NETFOUNDRY, Microsoft

Sample clients

- A European manufacturer of electrical distribution systems
- A global corporate and fund solutions provider
- A global materials solutions provider
- A global plant-based ingredients company
- A global supplier of bakery ingredients
- An Indian fast-food franchise
- A Singapore-based airline

Industry coverage

- Banking
- Financial services
- Insurance
- Healthcare & life sciences
- High-tech
- Telecom, media & entertainment
- Retail & CPG
- Manufacturing
- Travel & transportation
- Utilities & resources
- Nonprofits (development banks, charities)
- Government

Darker color indicates higher industry concentration:

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Tata Communications: RadarView profile

Analyst insights

Practice maturity ★★★★★

- Tata Communications Limited (TCL) has over 620 points of presence and over 110 cloud service connections spread out globally across geographies such as North America, Latin America, Europe, the Middle East and Africa, and Asia Pacific.
- TCL has a strong presence in APAC and Europe, contributing more than 50% and 34%, respectively, to its total SD-WAN managed services revenue. Manufacturing, retail and CPG, high-tech, and healthcare and life sciences contribute to more than 60% of the total managed services revenue.
- It provides SD-WAN services through its IZO SDWAN platform that helps enterprises solve their networking challenges with the help of its multidomain expertise spread across network, security, and cloud. Its TCx Platform is technology agnostic and offers orchestration, policy changes, and reporting capabilities for visualizing end-to-end architecture and APIs for direct frontend integration by its enterprise clients.
- TCL assesses its customers' requirements and provides the best-fit SASE solutions by leveraging its global SASE points of presence and using technology and hardware solutions of its partners, including Fortinet, Palo Alto Networks, Zscaler, Versa Networks, and Netskope.

Partner ecosystem ★★★★

- TCL has strategic partnerships with several SD-WAN hardware and platform providers such as Silver Peak, Cisco Viptela and Meraki, Fortinet, and security providers such as Zscaler and Palo Alto Prisma for zero-trust, firewall, and cloud access. It leverages its partners for joint go-to-market initiatives.
- It also partners with its subsidiary NetFoundry, which spun off from TCL in 2019, for an on-demand vendor-agnostic SD-WAN solution to address zero-trust remote access and SaaS optimization use cases. TCL partners with multiple SI and deployment partners to ensure the global reach of the SD-WAN platform.
- It partners with universities such as Harvard, Wharton, VIT, and IIT Madras as a lab partner and for publishing thought leadership content.

Investments and innovation ★★★★★

- TCL places great importance on developing new solutions and services and has allocated more than 30% of its planned investments toward this. In the next 12 months, it plans to enhance its SASE offerings, productize SD-WAN services, and improve AI/ML usage in service automation.
- It has launched its SD-WAN as a Service offering, with plans for a wider release. It also plans to increase its partnerships with system integrators, OEM providers, and other technology partners such as Palo Alto Networks.
- TCL has developed an innovative solution, SPAED (Secure Private Access Edge Devices), to address use cases related to small retail, temporary sites, and work-from-home usage.

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