

# Everest Group PEAK Matrix® for Software-Defined Wide Area Network (SD-WAN) Service Providers 2021

**Focus on Orange Business Services**  
November 2021



## 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

## SD-WAN services PEAK Matrix® characteristics

### Leaders:

Accenture, AT&T, BT, HCL Technologies, Orange Business Services, and TCS

- Leaders in SD-WAN services have established successful businesses in delivering global coverage, driven by capability building and experience across the end-to-end SD-WAN services spectrum including planning, proof of concept, design, configuration, deployment, and management
- These players provide flexibility in terms of commercial models and can support underlay, overlay, and application performance along with a mature orchestration solution
- Leaders have a strong focus on driving alignment between the business and IT teams of enterprises, to drive higher value through contextual solutions, tailored to specific enterprise requirements
- All Leaders have a strong focus on embedding security in their SD-WAN service offerings, supporting multiple vendor deployments, and proactively driving innovation in client environments

### Major Contenders:

IBM, Infosys, Microland, NTT, Tata Communications, Telstra, Verizon, and Wipro

- Major Contenders in the SD-WAN services space include a mix of large and mid-sized telecom providers and system integrators
- These players have built meaningful capabilities to deliver SD-WAN services (both deployment and management); however, their service portfolios are not as balanced and comprehensive as those of Leaders (either in terms of coverage across industry verticals or geographies or both) – this is also reflected in the scale of market success achieved by these players (vis-a-vis Leaders)
- However, all these players are making continued investments in developing internal IP and tools, as well as expanding their service and technology partnership networks in order to plug their capability gaps, and are, as a result, positioning themselves as strong challengers to the Leaders in this space

### Aspirants:

Mphasis and Zensar

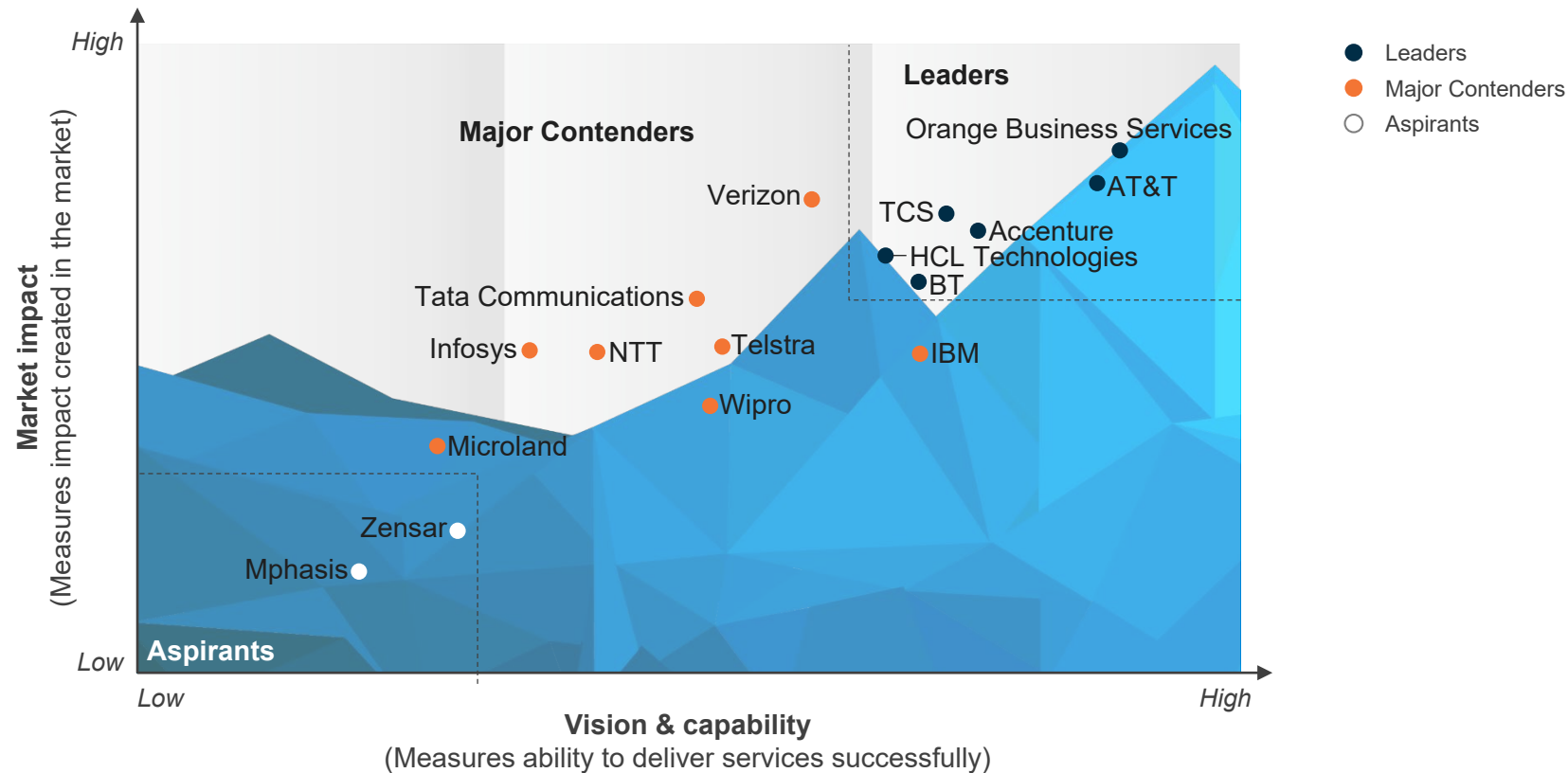
- The SD-WAN services business of Aspirants is in the initial stages of growth and is currently not a leading revenue generator for these players
- Nevertheless, these companies are making investments to build broader capabilities to cater to buyers (through service and technology partnerships as well as internal IP/tools)

# Everest Group PEAK Matrix®

## Software-Defined Wide Area Network (SD-WAN) Services PEAK Matrix® Assessment 2021 | Orange Business Services positioned as Leader



Everest Group Software-Defined Wide Area Network (SD-WAN) Services PEAK Matrix® Assessment 2021<sup>1</sup>



<sup>1</sup> 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.

# Orange Business Services | SD-WAN services (page 1 of 4)

## Overview

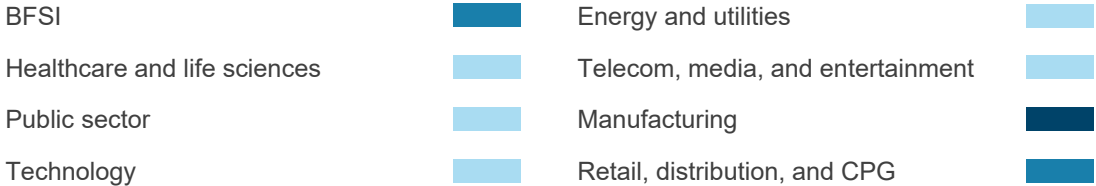
Orange Business Services is supporting its customers in their transformations towards a more hyper-connected, cloud-based, and data-driven digital ecosystem. It connects not only people and company sites but also systems, processes, and machines using its own, trusted infrastructure that are the foundation for any digital transformation. Leveraging its proven, wide-ranging expertise in cloud, security, Smart Mobility/IoT business, and emerging 5G environment. Its next-generation global network aims to provide companies with application and business flexibility, security, and performance without compromising on any of the components.

### SD-WAN services revenue

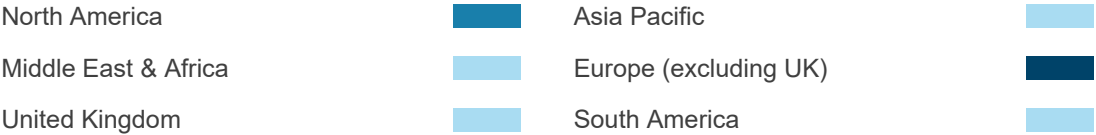


Low (<10%) Medium (10-20%) High (>10%)

### Adoption by industry



### Adoption by geography



### Adoption by buyer groups



### Adoption by service segments



# Orange Business Services | SD-WAN services (page 2 of 4)

## Case studies and solutions

Proprietary solutions (representative list)	
Solution name	Details
Flexible SD-WAN	<ul style="list-style-type: none"><li>• This solution has integrated security to ensure enhanced application performance and connectivity with different cloud service providers</li><li>• It has an embedded service portal that provides monitoring, analytics, and configuration functions for simplified management and visibility into the WAN network</li></ul>
Galerie	<ul style="list-style-type: none"><li>• Galerie provides secure access to cloud via VPN and SD-WAN solution</li><li>• This solution accesses cloud applications and IT infrastructure from private network</li><li>• It is provided as a fully-managed 24*7 service</li></ul>

Case study	Transforming network infrastructure and implementing Flexible SD-WAN solution for a leading banking firm
<p><b>Client:</b> One of the largest bank in Europe</p> <p><b>Business challenge</b></p> <p>The client wanted end-to-end support to migrate branches in France to SD-WAN technology and a scalable and programmable network infrastructure</p> <p><b>Solution</b></p> <ul style="list-style-type: none"><li>• Implemented Flexible SD-WAN solution to support client in its digital transformation journey</li><li>• Provided client with multi-cloud, multi-application hybrid network, and cloud connectivity</li></ul> <p><b>Impact</b></p> <ul style="list-style-type: none"><li>• Helped client improve user experience and optimized network bandwidth</li><li>• Improved the speed of deployment by ten times</li></ul>	

# Orange Business Services | SD-WAN services (page 3 of 4)

## Partnerships, investments, and recent activities










Partnerships (representative list)	
Partner name	Details
Fortinet	<ul style="list-style-type: none"><li>Partnered with Fortinet to include Fortinet's Secure SD-WAN solution in its overall offering</li><li>Offers Fortinet's security-driven networking solutions including Secure SD-WAN solution for its clients</li></ul>
Cisco	<ul style="list-style-type: none"><li>Offers full suite of connectivity services including LAN, WAN, and wireless networks along with datacenter and security services</li><li>Offers Cisco's SD-WAN and SD-LAN technologies to its clients</li><li>Uses ThousandEyes for SD-WAN performance visibility solution, managed internet, and multi-cloud connectivity</li></ul>
Riverbed	<ul style="list-style-type: none"><li>Delivers Riverbed solutions including WAN optimization, IT virtualization, visibility, and SD-WAN. The SD-WAN solution is powered by Riverbed® SteelConnect™</li><li>Riverbed technology is integrated with Orange's hybrid network portfolio</li></ul>

Investments (representative list)	
Investment name	Details
Next Gen Hub	It is a cloud and edge computing intelligent network platform, which ensures performance, security, and flexibility. Its key features include virtualized network functions, multi-cloud gateway, an ease of transport & access, along with an additional feature of orchestration
SD-WAN co-innovation program	<ul style="list-style-type: none"><li>Orange has set up SD-WAN co-innovation program along with Cisco to assist customers in LAN and WAN transformation journey</li><li>Both the companies will be working together to develop SD-WAN Proof of Concept (PoC) in Orange's Open Lab</li><li>Orange and Cisco will be working in the areas of multi-domain segmentation, automation, intent-based networking, and analytics</li></ul>
Open Lab	<ul style="list-style-type: none"><li>Orange and Cisco have collaborated to help clients in their SD-WAN transformation journey</li><li>It provides equipment, tools, and experts to develop PoCs</li></ul>

# Orange Business Services | SD-WAN services (page 4 of 4)

## Everest Group assessment – Leader

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

- Orange is ideal for clients looking for a vendor-agnostic approach for SD-WAN. It supports offerings from Cisco, Fortinet, Juniper, Palo Alto Networks, and Riverbed
- It can integrate MPLS, SD-WAN, security, mobility, and internet services with WAN optimization and application visibility services
- Orange offers a co-innovation program with Cisco for LAN and WAN transformation. It is also providing PoCs for AI-enabled SD-WAN log and traffic analysis to improve operational efficiency and performance
- Clients appreciate Orange’s quality of services, technical expertise, reliable global coverage, and expertise on Cisco and Fortinet platforms

### Limitations

- Despite its positioning as a system integrator, the company’s telecom heritage makes it susceptible to competition from new entrants and incumbent SIs
- In various geographies, it leverages multiple local partners for service delivery. Clients need to ensure appropriate checks are in place to ensure high service levels
- Orange is in the initial stages of supporting Zero-Trust Network Access (ZTNA) solution in addition to SD-WAN. Clients need to validate relevant capabilities prior to the engagement
- Clients feel OBS needs to be more proactive in embedding innovation in the transformation engagements

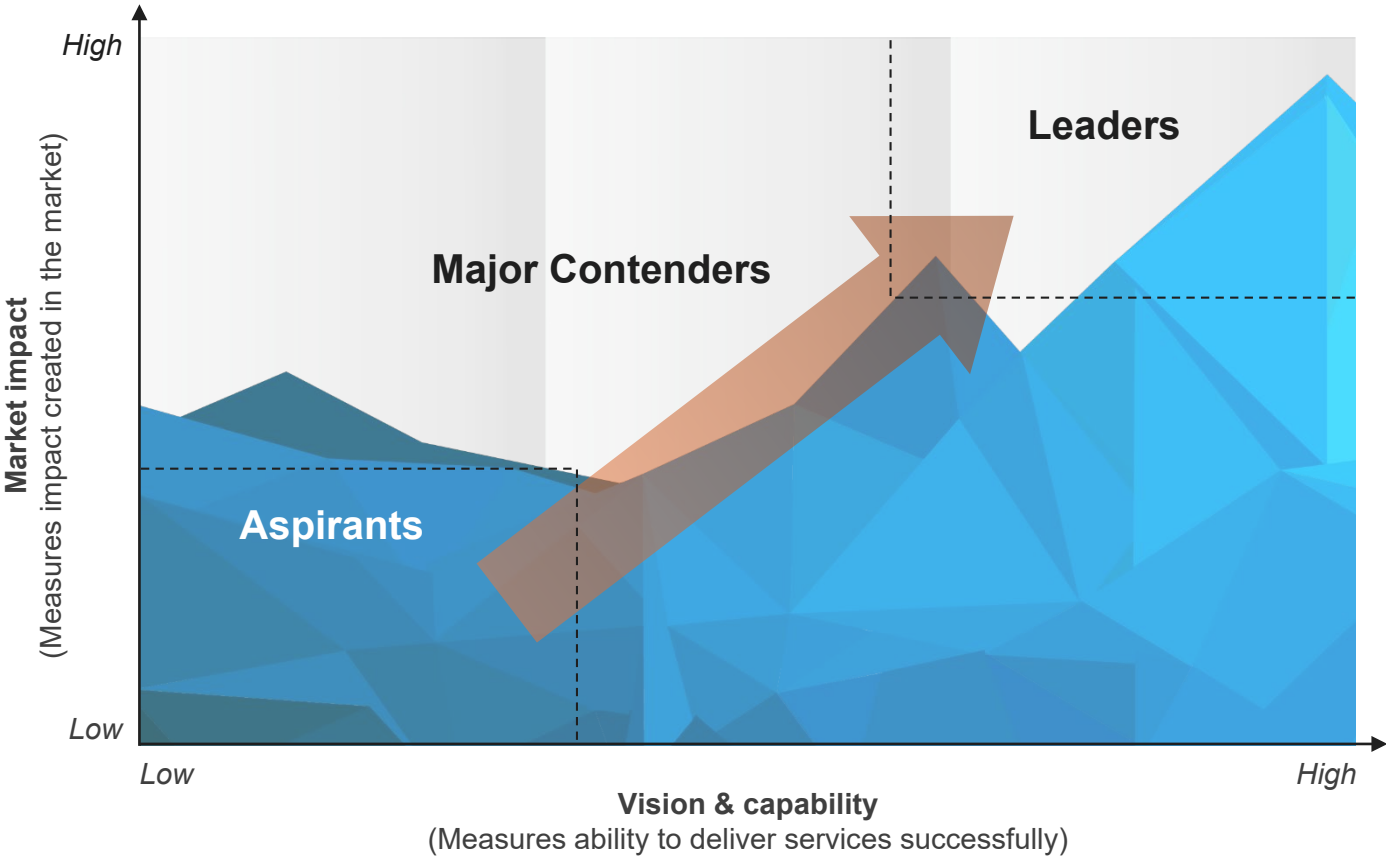


# Appendix

Everest Group PEAK Matrix® is a proprietary framework for assessment of market impact and vision & capability



Everest Group PEAK Matrix



# Services PEAK Matrix® evaluation dimensions

Measures impact created in the market – captured through three subdimensions

Market adoption

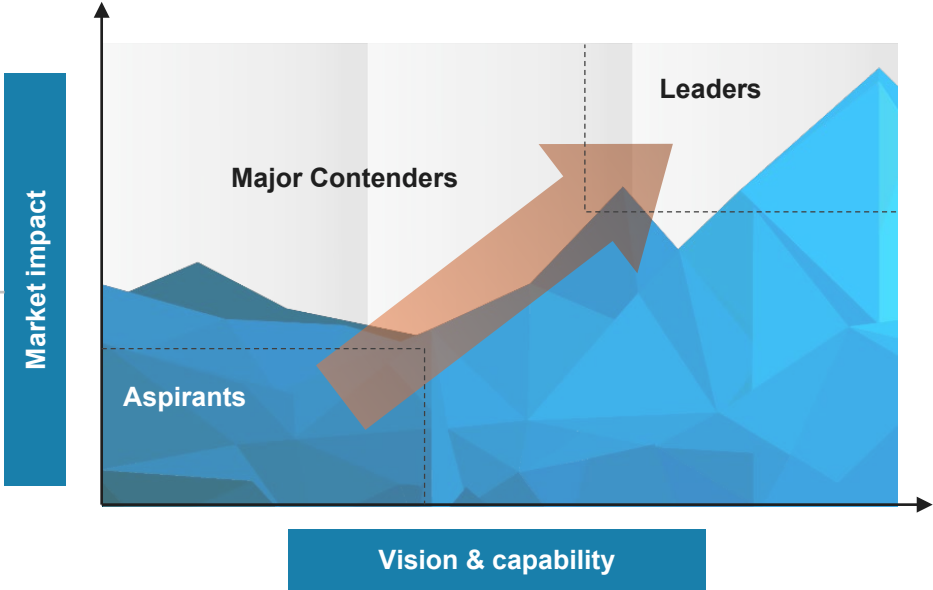
Number of clients, revenue base, YOY growth, and deal value/volume

Portfolio mix

Diversity of client/revenue base across geographies and type of engagements

Value delivered

Value delivered to the client based on customer feedback and transformational impact



Measures ability to deliver services successfully. This is captured through four subdimensions

Vision and strategy

Vision for the client and itself; future roadmap and strategy

Scope of services offered

Depth and breadth of services portfolio across service subsegments/processes

Innovation and investments

Innovation and investment in the enabling areas, e.g., technology IP, industry/domain knowledge, innovative commercial constructs, alliances, M&A, etc.

Delivery footprint

Delivery footprint and global sourcing mix

# FAQs

## **Does the PEAK Matrix® assessment incorporate any subjective criteria?**

Everest Group's PEAK Matrix assessment adopts an unbiased and fact-based approach (leveraging service provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information). In addition, these results are validated / fine-tuned based on our market experience, buyer interaction, and provider/vendor briefings

## **Is being a “Major Contender” or “Aspirant” on the PEAK Matrix, an unfavorable outcome?**

No. The PEAK Matrix highlights and positions only the best-in-class service providers / technology vendors in a particular space. There are a number of providers from the broader universe that are assessed and do not make it to the PEAK Matrix at all. Therefore, being represented on the PEAK Matrix is itself a favorable recognition

## **What other aspects of PEAK Matrix assessment are relevant to buyers and providers besides the “PEAK Matrix position”?**

A PEAK Matrix position is only one aspect of Everest Group's overall assessment. In addition to assigning a “Leader”, “Major Contender,” or “Aspirant” title, Everest Group highlights the distinctive capabilities and unique attributes of all the PEAK Matrix providers assessed in its report. The detailed metric-level assessment and associated commentary is helpful for buyers in selecting particular providers/vendors for their specific requirements. It also helps providers/vendors showcase their strengths in specific areas

## **What are the incentives for buyers and providers to participate/provide input to PEAK Matrix research?**

- Participation incentives for buyers include a summary of key findings from the PEAK Matrix assessment
- Participation incentives for providers/vendors include adequate representation and recognition of their capabilities/success in the market place, and a copy of their own “profile” that is published by Everest Group as part of the “compendium of PEAK Matrix providers” profiles

## **What is the process for a service provider / technology vendor to leverage their PEAK Matrix positioning and/or “Star Performer” status ?**

- Providers/vendors can use their PEAK Matrix positioning or “Star Performer” rating in multiple ways including:
  - Issue a press release declaring their positioning. See [citation policies](#)
  - Customized PEAK Matrix profile for circulation (with clients, prospects, etc.)
  - Quotes from Everest Group analysts could be disseminated to the media
  - Leverage PEAK Matrix branding across communications (e-mail signatures, marketing brochures, credential packs, client presentations, etc.)
- The provider must obtain the requisite licensing and distribution rights for the above activities through an agreement with the designated POC at Everest Group.

## **Does the PEAK Matrix evaluation criteria change over a period of time?**

PEAK Matrix assessments are designed to serve present and future needs of the enterprises. Given the dynamic nature of the global services market and rampant disruption, the assessment criteria are realigned as and when needed to reflect the current market reality as well as serve the future expectations of enterprises



Everest Group is a research firm focused on strategic IT, business services, engineering services, and sourcing. Our clients include leading global companies, service providers, and investors. Clients use our services to guide their journeys to achieve heightened operational and financial performance, accelerated value delivery, and high-impact business outcomes. Details and in-depth content are available at [www.everestgrp.com](http://www.everestgrp.com).

## Stay connected

### Website

[everestgrp.com](http://everestgrp.com)

### Social Media

 @EverestGroup

 @Everest Group

 @Everest Group

 @Everest Group

### Blog

[everestgrp.com/blog](http://everestgrp.com/blog)

### 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

This document is for informational purposes only, and it is being provided "as is" and "as available" without any warranty of any kind, including any warranties of completeness, adequacy, or fitness for a particular purpose. Everest Group is not a legal or investment adviser; the contents of this document should not be construed as legal, tax, or investment advice. This document should not be used as a substitute for consultation with professional advisors, and Everest Group disclaims liability for any actions or decisions not to act that are taken as a result of any material in this publication.