

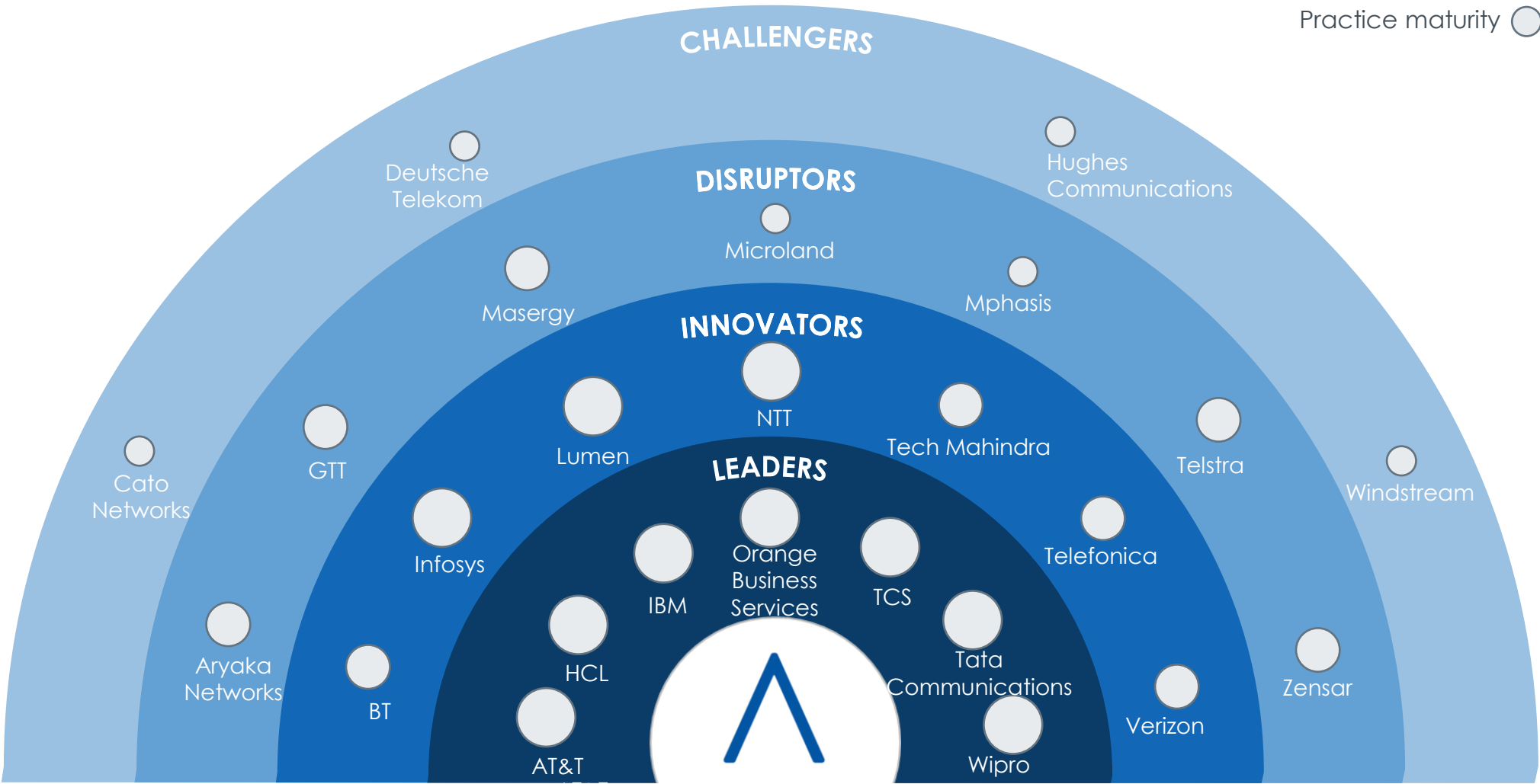


SD-WAN Managed Services 2021–2022 RadarView

Service Provider Profile

December 2021

SD-WAN Managed Services 2021–2022 RadarView



HCL: RadarView profile

HCL



Practice maturity ★★★★★

Partnership ecosystem ★★★★★

Investments & innovation ★★★★★

Takes a consultative approach toward SD-WAN engagements. Continues to augment NetBot by adding orchestration capabilities.

Practice overview

- Practice size: 1,600+
- Active since: 2016
- Active clients: 28+
- Externally certified resources: 520+
- Delivery highlights: More than one million end points managed manually

50%–75%
SD-WAN
revenue growth
2020–2021

\$100–\$250M
SD-WAN
revenue
2020–2021

Key IP and assets

- Transport Independent Site (TIS 2.0): A framework for end-to-end implementation and management of off-the-shelf SD-WAN solutions
- Nlighten: A proprietary network assessment and consulting framework
- NetBot: A network automation offering that is part of the DRYICE portfolio

Client case studies

- An American clothing and accessories retailer struggled with its traditional WAN network, including T1 links and no security. HCL designed, built, and migrated 2,100 sites across Canada, North America, and Mexico from the old environment to Cisco Viptela SD-WAN. This resulted in a 60%–70% annual cost savings.
- A Swiss staffing firm with over 500 branch offices faced problems with high cost and unavailability of existing MPLS links. HCL designed, built, and migrated more than 540 sites to the Cisco Meraki SD-WAN with a mix of MPLS, LTE, and broadband circuits. It used the Meraki dashboard for integrated monitoring. This resulted in reduced yearly telecom costs.
- An American country club wrestled with high costs and low bandwidth for a single MPLS link. HCL designed and implemented VMware VeloCloud SD-WAN and replaced single MPLS links with dual internet broadband links, providing local internet breakout at each site. Yearly telecom costs were reduced by about 10x and customer experience was enhanced.

Key partnerships

Platform/technology partners



Security partners and others



Sample clients

- A Swiss human resources provider and staffing firm
- An American clothing and accessories retailer
- A multinational motor manufacturing company
- An American country club
- A Finnish multinational telecommunications company
- A New Zealand dairy product manufacturing company

Industry coverage

Aerospace & defense
Banking
Financial services
Government
Healthcare & life sciences
High-tech
Insurance
Manufacturing
Nonprofits
Retail & CPG
Telecom, media & entertainment
Travel & transportation
Utilities & resources

Darker color indicates higher industry concentration: ●●●●●

Analyst insights

Practice maturity



- HCL offers an entire breadth of network orchestration services in three interconnected segments: enterprise network services, telecom network services, and product engineering. SD-WAN transformation services, which are part of the enterprise network services, were started in early 2015.
- HCL takes a consultative approach in delivering managed SD-WAN services. It leverages Nlighten, its proprietary framework for network and SASE assessment, to plan and strategize network transformation for its enterprise customers.
- HCL's product portfolio includes TIS 2.0 (a framework for end-to-end implementation and management of off-the-shelf SD-WAN solutions), NetBot (AI-driven network orchestration), Sensus (SDN framework for data center network transformation), and Nucleus (campus network transformation).
- Manufacturing, retail, healthcare and life sciences, and utilities and resources are the key industry verticals contributing ~75% of the total managed SD-WAN services revenue. Very large (>\$1B revenue) and large (\$500M–\$1B in revenue) enterprises contribute ~80% of the total SD-WAN services revenue.
- HCL utilizes Fluid Connect Work From Home SD-WAN Solution and its intello-Fi solution, to enable remote working for its enterprise customers.

Partner ecosystem



- Over the last 25+ years, HCL has developed a strong partner ecosystem and holds strategic partnerships with major OEMs in this space, including Cisco, Microsoft, Dell, Symantec, and VMware. HCL leverages these partnerships for joint GTM, product development, and implementation.
- Its partners include HPE (Aruba, Silver Peak), Riverbed, Fortinet, Citrix NetScaler, Cloudgenix (SD-WAN hardware and software providers), AWS, Azure, GCP (Premier partnership for cloud services); Zscaler, Palo Alto (security services); ThousandEyes, LiveAction, SolarWinds (monitoring and reporting).
- HCL partners with SD-WAN players and telcos such as AT&T, Telstra, Colt, BT, Orange, Teridion, Megaport, Equinix, and Interxion, providing global coverage for CNL and PoPs. It partners with 70+ telecom service providers globally for leased lines/MPLS/IPVPN services.

Investments and innovation



- HCL acquired Broadcom-Symantec Enterprise Division (SED) in 2019 for network security, endpoint security, web security services, and cloud security. In 2020, they acquired Cisco's Self-Optimizing Network (SON) Technology products and services to strengthen 5G networks offerings.
- HCL invested \$10 million in its Network Experience Centre in Noida and SDI lab in Chennai. It continues to focus and invest in creating an innovation funnel for IP creation, innovation conceptualization, thought leadership, niche technology evaluation, start-up exploration, and incubation.
- Building solutions across emerging areas including WiFi 6, edge computing, and 5G, designing SASE blueprints with partners, delivering IoT instances on uCPE, and advanced AIOps platform for single-pane-of-glass management are some of the key focus areas for HCL in the next 12–15 months.

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