

Global Software-Defined Wide Area Network (SD-WAN) Market By Component (Solution and Services), By Organization Size (Large Enterprises and Small & Medium Enterprises), By End User (Service Providers, Retail, Government & Defense, Energy & Utilities, Healthcare & Life Sciences, BFSI and Others), By Region, Industry Analysis and Forecast, 2020 - 2026

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Abstracts

The Global Software-Defined Wide Area Network (SD-WAN) Market size is expected to reach \$9.8 billion by 2026, rising at a market growth of 33.8% CAGR during the forecast period. SD-WAN is a type of application of Software-Defined Networking (SDN) that utilizes software and virtual technologies in order to create a more reliable and faster WAN network. The SDN emphasizes more on the internal network, but SD-WAN allows connections between networks and devices over a WAN. In order to meet the growing need for their networking infrastructure, enterprises are considering new ways and therefore the SD-WAN market demand is showing rapid growth.

As there is an increase in the amount of data uses worldwide, a varied range of mission-critical assets, like applications, databases, and enterprise information are becoming more susceptible to unauthorized access. For the increasing threats, traditional WAN solutions are not enough to protect the network and offer effective and efficient security control for cloud applications. SD-WAN solutions support the monitoring network traffic and also ensure deep visibility of the IT departments into WAN and this helps them to pinpoint a security attack more quickly. Consequently, the SD-WAN market is anticipated to show considerable growth in the forecast period.

The software-defined wide area network market is likely to show significant growth globally in the coming years. Software-defined networking in a wide area network (WAN) makes it simpler to manage and operate a WAN as it decouples the networking

hardware from its controller mechanism. It gears virtualization technology for improving data center management and its operation.

The SD-WAN also gaining attention as organizations largely rely on the work-from-home initiative, due to the outbreak of COVID-19. The organizations are looking for some more advanced networking solutions that can have better agility and security to ensure successful remote working initiatives. Though, in the pandemic, the supply chain disruption is creating a short-term hurdle, mainly in the deployment of the appliances in SD-WAN. It is expected to have a positive impact of COVID-19 on the overall market; still, the market may show a marginal drop in the year 2020 because of supply chain disruptions.

Based on Component, the market is segmented into Solution and Services. Solution segment is further bifurcated into Hardware and Software. Based on Deployment Type, the market is segmented into On-premise and Cloud. Based on Organization Size, the market is segmented into Large Enterprises and Small & Medium Enterprises. Based on End User, the market is segmented into Service Providers, Retail, Government & Defense, Energy & Utilities, Healthcare & Life Sciences, BFSI and Others. Based on Regions, the market is segmented into North America, Europe, Asia Pacific, and Latin America, Middle East & Africa.

The major strategies followed by the market participants are Partnerships and Product Launches. Based on the Analysis presented in the Cardinal matrix; Oracle Corporation, Cisco Systems, Inc., and Huawei Technologies Co., Ltd. are the forerunners in the Software-Defined Wide Area Network (SD-WAN) Market. Companies such as Fortinet, Inc., Dell Technologies, Inc., Nokia Corporation, and Juniper Networks, Inc., Hewlett Packard Enterprise Company, NEC Corporation, and Citrix Systems, Inc. are some of the key innovators in the market.

The market research report covers the analysis of key stake holders of the market. Key companies profiled in the report include Oracle Corporation, Cisco Systems, Inc., Dell Technologies, Inc. (VMware, Inc.), Huawei Technologies Co., Ltd. (Huawei Investment & Holding Co., Ltd.), Nokia Corporation, Hewlett Packard Enterprise Company, Fortinet, Inc., NEC Corporation, Juniper Networks, Inc. and Citrix Systems, Inc.

Recent strategies deployed in Software-Defined Wide Area Network (SD-WAN) Market Partnerships, Collaborations, and Agreements:

Jul-2020: VMware partnered with Over the Wire (OTW), the telecommunications services provider. Under this partnership, OTW would deploy VMware's SD-Wan solution in Australia. The partnership enabled OTW to sell VMware's SD-WAN by VeloCloud service to enterprises and service providers.

May-2020: Citrix Systems teamed up with Check Point Software Technologies, a cybersecurity leader. The companies aimed to enable easy deployment and management of additional next-generation firewalls within Citrix SD-WAN to provide companies with extra layers of security to protect their assets at branches and beyond.

Apr-2020: Cisco extended its partnership with Google following which the companies launched a package that would enable customers to integrate SD-WAN connectivity with applications running in a private data center, Google Cloud, or another cloud or SaaS application. The jointly developed platform, named Cisco SD-WAN Cloud Hub with Google Cloud, integrated Cisco's SD-WAN policy, telemetry, and security-setting capabilities with Google's software-defined backbone to ensure that application service-level agreement, security, and compliance policies are extended across the network.

Apr-2020: Juniper Networks announced its partnership with T-Systems, a cross-manufacturing digital service provider. Under this partnership, the companies would create and deliver a managed SD-WAN infrastructure as part of an end-to-end service overlay solution for companies with complex network and connectivity requirements.

Mar-2020: Cisco collaborated with NTT EAST, a Japanese telecommunications company. Following the collaboration, NTT selected Cisco SD-WAN powered by Viptela for its new managed SD-WAN services under NTT EAST's VPN service portfolio for enterprises. New services aimed to help businesses solve network challenges driven by the growth of mobile workers, shortage of IT resources, and increasing network management costs.

Dec-2019: Fortinet and Tata Communications Transformation Services Limited (TCTS) collaborated with Microsoft Azure. Following the collaboration, the companies launched a fully managed SD-WAN offering for Azure Virtual WAN. The TCTS SD-WAN offering helped service providers create solutions to further enable enterprises with seamless migration to Azure, thereby helping to accelerate their revenue in IT migration to public clouds. This joint offering enabled inter-branch connectivity for customers using the Microsoft backbone and helps them to meet SLAs while securing access to applications running on Azure.

Nov-2019: Cisco partnered with Mindtree, a digital transformation and technology services company. Under this partnership, Cisco has been providing Mindtree, the managed secure SD-WAN (Software-Defined WAN) services. Mindtree can address customer needs and provide a seamless experience across multiple domains.

Oct-2019: VMware came into collaboration with Exertis, a leading distributor of technology products for the B2B, enterprise, mobile and retail markets. The latter company added VMware SD-WAN by VeloCloud to its enterprise portfolio. VMware SD-WAN by VeloCloud provides enterprise customers with a transformative wide area network experience, including exceptional application performance over any transport, drastically simplified network management, and streamlined access to Cloud services

and platforms.

Oct-2019: Nokia came into partnership with Vodafone Idea Business Services (VIBS), the enterprise arm of Vodafone Idea Ltd. Together with Nokia, Vodafone aimed to launch software-defined networking in a wide area network (SD-WAN) service for start-ups and enterprises. Through SD-WAN deployment, VIBS has been providing advanced networking and connectivity solutions and enabling enterprises to dramatically increase the speed of deployment, flexibility, and control.

Sep-2019: NEC Corporation of America partnered with Infovista, a leader in modern network performance. The partnership integrated Infovista's SD-WAN with NEC's unified communications services. Infovista's Ipanema SD-WAN offers superior SD-WAN functionality together with deep application visibility and application quality of service that ensures superior performance of voice and UC applications to complement NEC's UC-SDN offering.

Sep-2019: Juniper Networks came into partnership with French managed service provider, PYXYA. The partnership aimed to provide the Contrail SD-WAN solution to fulfill growing enterprise demand for secure branch connectivity. PYXYA has been using the broader capabilities of Contrail SD-WAN to move from SD-WAN to SD-Branch services in the future. PYXYA's portal enabled control of the WAN infrastructure, as well as the universalization software of the universal PyBox.

Sep-2019: Citrix Systems collaborated with cybersecurity company, Palo Alto Networks. Together, the companies enabled easy deployment and management of next-generation firewalls within Citrix SD-WAN, providing companies with added layers of security to protect their assets at branches and beyond. With Palo Alto Networks, Citrix is delivering an advanced SD-WAN security solution that enabled companies to protect users, data, and applications across branches, data centers, and public clouds.

Aug-2019: Cisco teamed up with CBTS, a leading technology provider that delivers communications, cloud, infrastructure, and consulting solutions. Following the collaboration, the latter company has been providing Cisco SD-WAN as a Service. CBTS is using SD-WAN technology to support more than 600 customers and 4,000 networks over eight countries.

Jun-2019: VMware collaborated with Elara Communications, a leading company in communications. The collaboration was aimed to offer VMware SD-WAN by VeloCloud in Mexico.

Jun-2019: Fortinet teamed up with Windstream Enterprise (WE), a leading provider of advanced network communications. Following the collaboration, the latter company expanded its SD-WAN portfolio solution to also include solutions Based on Fortinet. The addition of Fortinet's SD-WAN technology to the Windstream portfolio offers customers more choices and provides highly-secure, cloud-ready, and rich networking capabilities integrated with a next-generation firewall offering.

Acquisition and Mergers:

Jul-2020: Hewlett Packard Enterprise's networking business signed an agreement to acquire software-defined WAN standout Silver Peak. The acquisition would accelerate its edge-to-cloud strategy to provide a truly distributed cloud model and cloud experience for all apps and data wherever they live.

Nov-2018: Oracle took over Talari Networks, a leading provider of Software-Defined Wide Area Network (SD-WAN) technology. The acquisition complemented Oracle Communications' leading Session Border Controller (SBC) and network management infrastructure by adding high availability and Quality-of-Experience (QoE) connectivity and cloud application access across any IP network with the reliability and predictability of private networks.

Dec-2017: VMware acquired VeloCloud, the market leader in cloud-delivered SD-WAN that enables enterprises and service providers to deploy flexible, secure, and WAN connectivity. The acquisition strengthened VMware's position in leading the market transition to a software-defined future and enabled enterprises to bring their businesses into the digital era.

May-2017: Cisco acquired Viptela, a software-defined wide area network (SD-WAN) specialist. The acquisition enabled the company to provide a comprehensive portfolio of comprehensive on-premises, hybrid, and cloud-based SD-WAN solutions.

Product Launches and Product Expansions:

Jul-2020: Oracle Cloud launched Oracle SD-WAN Orchestration Cloud (OSOC), a solution to simplify multi-cloud integration and managing network traffic. OSOC is powered by Oracle Cloud Infrastructure and forms part of the Oracle SD-WAN portfolio. The suite provides a high-performance network for services such as remote office WAN, IoT, contact centers, unified communications, and collaboration.

Jul-2020: Huawei introduced a new generation of 5G AR (NetEngine AR Series) enterprise routers. These devices provide powerful 5G uplink capabilities and SD-WAN support across the entire range. It seamlessly meets the needs of the enterprise branch WAN bandwidth explosion.

Jul-2020: Fortinet introduced the Fortinet Secure SD-WAN for Multi-Cloud, networking, and security solution. This solution solves common application performance, visibility, cost, and control challenges associated with multi-cloud deployments by enabling SD-WAN across multiple clouds and regions.

Feb-2020: Fortinet released the FortiGate 40F, a new Secure SD-WAN appliance powered by Fortinet's patented SoC4 SD-WAN ASIC for small and midsize businesses. FortiGate 40F is the most affordable Secure SD-WAN appliance on the market and features the smallest form factor of all FortiGate appliances, with options for built-in LTE

or built-in WiFi to enable a wide range of organizations to deploy Fortinet Secure SD-WAN.

Dec-2019: Juniper Networks made enhancements to its offering, with the launch of LAN support and new equipment. Its new solution addresses the current state of disparate software-defined networking (SDN) products and services that often focus on specific use cases instead of providing a holistic enterprise solution.

Apr-2019: Fortinet unveiled the Next-Generation Firewall (NGFW), the FortiGate 100F. This firewall also includes SD-WAN capabilities, including support for multiple link types, and application and performance-based path selection, among other SD-WAN features.

Scope of the Study

Market Segmentation:

By Component

- Solution

- o Hardware

- o Software

- Services

By Deployment Type

- On-premise

- Cloud

By Organization Size

- Large Enterprises

- Small & Medium Enterprises

By End User

Service Providers

Retail

Government & Defense

Energy & Utilities

Healthcare & Life Sciences

BFSI

Others

By Geography

North America

- o US
- o Canada
- o Mexico
- o Rest of North America

Europe

- o Germany
- o UK
- o France
- o Russia
- o Spain
- o Italy
- o Rest of Europe

Asia Pacific

- o China
- o Japan
- o India
- o South Korea
- o Singapore
- o Malaysia
- o Rest of Asia Pacific

LAMEA

- o Brazil
- o Argentina
- o UAE
- o Saudi Arabia
- o South Africa
- o Nigeria
- o Rest of LAMEA

Companies Profiled

Oracle Corporation

Cisco Systems, Inc.

Dell Technologies, Inc. (VMware, Inc.)

Huawei Technologies Co., Ltd. (Huawei Investment & Holding Co., Ltd.)

Nokia Corporation

Hewlett Packard Enterprise Company

Fortinet, Inc.

NEC Corporation

Juniper Networks, Inc.

Citrix Systems, Inc.

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