

Magic Quadrant pour le SD-WAN

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Bien que le marché du Software-Defined WAN arrive à maturité, il existe encore des différences significatives entre les fournisseurs. Les responsables I&O responsables de la mise en réseau devraient utiliser cette recherche pour aider à sélectionner les fournisseurs de SD-WAN les mieux alignés sur leurs exigences en matière de sécurité et de connectivité cloud.

Hypothèses de planification stratégique

D'ici 2026, 60 % des nouveaux achats de SD-WAN feront partie d'une offre SASE (Secure Access Service Edge) à fournisseur unique, contre 15 % en 2023.

D'ici 2026, la technologie d'IA générative intégrée aux offres SD-WAN sera utilisée pour 20 % de la configuration initiale du réseau, contre près de zéro en 2023.

Définition/description du marché

Ce document a été révisé le 12 octobre 2023. Le document que vous consultez est la version corrigée. Pour plus d'informations, consultez la page [Corrections](#) sur [gartner.com](#).

Gartner définit les offres SD-WAN comme étant principalement utilisées pour connecter des succursales à d'autres sites d'entreprise et cloud. Les produits SD-WAN permettent une sélection dynamique des chemins, en fonction de la politique de l'entreprise ou de l'application, du routage, de l'orchestration centralisée de la politique et de la gestion des appliances, du réseau privé virtuel (VPN) et de la configuration sans intervention. Les produits SD-WAN sont indépendants du transport WAN et de l'opérateur et créent des chemins sécurisés entre les connexions WAN physiques.

Les produits SD-WAN remplacent les routeurs de succursale traditionnels et permettent la connectivité entre les succursales de l'entreprise ainsi que le cloud. Ils facilitent l'évolution de la connectivité WAN d'une connectivité MPLS (Multiprotocol Label Switching) centrée sur l'Internet public pour prendre en charge le transfert du trafic d'entreprise des centres de données privés vers le cloud public et le SaaS.

Les fonctionnalités indispensables pour les offres SD-WAN sont les suivantes :

- Logiciel:

- Possibilité de remplacer un routeur de succursale (par exemple, prise en charge du protocole BGP [Border Gateway Protocol])
- Sélection dynamique de chemin en fonction des applications (par exemple, direction du trafic de couche 7) sur plusieurs interfaces physiques
- Réseau privé virtuel (VPN)
- Facteur de forme pour les succursales, les centres de données et les emplacements cloud :
 - Logiciel pouvant être déployé sur une appliance matérielle de marque ou sur du matériel tiers
 - Logiciels déployés dans le cloud public
- Orchestrator (sur site ou dans le cloud) qui fournit un mécanisme centralisé pour :
 - Configuration (configuration sans contact)
 - Gestion
 - Visibilité/Analyse/Dépannage

Les fonctionnalités standard des offres SD-WAN sont les suivantes :

- Pare-feu de base
- Logiciel fourni sous la forme d'une fonction de réseau virtuel (VNF), d'une machine virtuelle (VM) ou d'un conteneur
- Appliance matérielle clé en main de marque
- Prise en charge de l'API
- Fonctionnalités de chaînage de services

Les fonctionnalités optionnelles pour les offres SD-WAN sont les suivantes :

- Sécurité avancée sur site (par exemple, pare-feu de couche 7, filtrage d'URL/de contenu, antivirus, protection contre la perte de données [DLP], sandboxing)
- Passerelles cloud pour l'insertion de services et une connectivité cloud simplifiée
- Réseau fédérateur WAN/fonctionnalités Internet améliorées
- Capacités d'optimisation des performances des applications (par exemple, correction d'erreur directe [FEC], duplication de paquets, optimisation WAN et optimisation SaaS)
- Extended orchestration beyond SD-WAN to include wireless LAN (WLAN)/LAN/security to form SD-branch

- AI networking support for proactive remediation and incident management
- Software only solution deployable on an end-user device for remote users

Quadrant magique

Figure 1 : Magic Quadrant pour le SD-WAN



Source : Gartner (septembre 2023)

Points forts et mises en garde des fournisseurs

Barracuda

Barracuda est un acteur de niche dans ce Magic Quadrant. Il dispose de deux produits SD-WAN, CloudGen Firewall et SecureEdge, avec des appliances matérielles et des logiciels avec orchestration et gestion. CloudGen Firewall est son offre traditionnelle, avec SecureEdge une solution plus récente qui prend en charge la transition vers une offre SASE. Gartner estime que Barracuda compte environ 1 500 entreprises clientes SD-WAN et opère principalement en Amérique du Nord et en Europe, au Moyen-Orient et en Afrique (EMEA), principalement auprès de petites entreprises et de PME et de marchés verticaux sélectionnés. Au cours des 18 prochains

mois, nous prévoyons que Barracuda investira dans son service de sécurité de reporting et d'analyse basé sur le cloud, son XDR basé sur le cloud et ses capacités de calcul en périphérie intégrées avec ses appareils SD-WAN.

Forces

- **Prix** : Les prix de Barracuda sont compétitifs par rapport aux autres fournisseurs de cette étude, ce qui est attrayant pour les organisations sensibles aux prix.
- **Sécurité sur site** : Barracuda a intégré la sécurité sur site dans son offre SD-WAN.
- **Accent mis sur le marché intermédiaire** : Barracuda se concentre sur les entreprises de taille moyenne et les PME, ainsi que sur les caractéristiques et fonctionnalités requises pour ce segment de marché.

Précautions

- **Innovation** : Il est peu probable que les innovations prévues par Barracuda offrent des capacités révolutionnaires sur le marché, car elles sont davantage axées sur la facilité d'utilisation pour les clients du marché intermédiaire.
- **Visibilité sur le marché** : Barracuda a une visibilité limitée sur le marché du SD-WAN auprès des clients et des prospects, sur la base des interactions des utilisateurs finaux avec Gartner, des recherches gartner.com et des conversations sur les réseaux sociaux.
- **Viabilité** : En raison des informations financières limitées disponibles sur Barracuda, il existe une incertitude quant à sa viabilité à long terme sur ce marché par rapport aux autres fournisseurs de cette recherche.

Cisco

Cisco is a Leader in this Magic Quadrant. Its offerings include Cisco Catalyst SD-WAN (formerly Viptela) and Cisco Meraki SD-WAN. The offerings provide separate SD-WAN appliances with additional advanced integrated security, licensed software, and the requisite management and orchestration. Gartner estimates that Cisco has approximately 46,000 SD-WAN enterprise customers and operates globally, serving clients of all sizes and verticals. Over the next 18 months, we expect Cisco will invest in its security dashboard, security service edge (SSE) third-party integrations in support of dual-vendor SASE and enhanced cloud onramp for multicloud implementations.

Strengths

- **Market visibility**: Cisco has strong SD-WAN market awareness and a large, loyal installed base, which helps it remain visible on client shortlists.
- **Sales channels**: The vendor has a strong go-to-market motion, which increases the likelihood that customers will have access to the solution.
- **Product strategy**: Cisco's product strategy is aligned with the current and future needs of enterprise SD-WAN customers in terms of AI networking, integrated security, scalability and

cloud onramp, which bodes well for its future prospects in this market.

Cautions

- **Customer experience:** Compared with other vendors in this research, Cisco's customer experience is below average, based primarily on Gartner client interactions.
- **Multiple SD-WAN products:** Cisco's Catalyst SD-WAN and Meraki SD-WAN are separate offerings with different management platforms, which increases the likelihood of an improper product choice and/or limits investment protection for customers.
- **Market investment:** Cisco's targeted investment growth in the SD-WAN market is uncertain due to limited available financial information, compared with other vendors in this research.

Cradlepoint

Cradlepoint is a Niche Player in this Magic Quadrant. Its offering includes the Cradlepoint NetCloud Service, E Series SD-WAN routers and the NetCloud Exchange Service Gateway, as well as licensed software. Gartner estimates that Cradlepoint has approximately 3,500 enterprise SD-WAN customers and operations primarily in North America, Europe and the Asia/Pacific region, focusing on wireless WAN use cases in specific verticals such as retail, transportation and public safety. Over the next 18 months, we expect Cradlepoint will invest in AIOps, adaptive SD-WAN with forward error correction (FEC) and link bonding, as well as integrating Ericom to deliver a single-vendor SASE offering focusing on the 5G market.

Strengths

- **Vertical strategy:** Cradlepoint has a strong focus on traditional cellular wireless verticals with mobile and backup use cases in retail, transportation and public safety.
- **Sales strategy:** Cradlepoint has a focused sales strategy to reach organizations that are consistent with its target market, which will improve its chances to grow.
- **Geographic strategy:** Cradlepoint is focused on specific expansion in Japan, India, the UAE and Thailand that is consistent with where wireless WAN technology will be in highest demand.

Cautions

- **Product:** Cradlepoint's product has limited appeal for enterprise buyers that are not interested in a wireless WAN offering.
- **Sales execution:** Cradlepoint has low SD-WAN market share and narrow channels, which limits the vendor's ability to grow in this market.
- **Market investment:** Cradlepoint has lower expected investment growth in the SD-WAN market compared with other vendors in this research.

Forcepoint

Forcepoint is a Niche Player in this Magic Quadrant. It offers the FlexEdge Secure SD-WAN physical or virtual appliance with FlexEdge Secure SD-WAN Manager and integrated next-generation firewall (NGFW). Gartner estimates that Forcepoint has approximately 3,500 SD-WAN enterprise customers and it operates globally (with a strong presence in Europe), focusing on the retail, government and financial verticals. Over the next 18 months, we expect the vendor will invest in single-vendor SASE, cloud-based centralized SD-WAN management-as-a-service and multifunctional distributed enforcement at network WAN edges.

Strengths

- **On-premises security:** Forcepoint has a broad set of integrated on-premises security capabilities with its SD-WAN solution.
- **Customer base:** Forcepoint has existing security customers that are targets for upgrading to SD-WAN.
- **Geographic strategy:** Forcepoint has a focused plan for regional expansion in the Asia/Pacific and Latin America regions, looking to take advantage of the growing demand outside of North America and Europe.

Cautions

- **Market visibility:** Forcepoint has low SD-WAN market visibility among customers and prospects, based on end-user Gartner client interactions, searches on gartner.com and social media conversations.
- **Product:** Forcepoint's product has limited performance optimization and cloud onramp features, which limits its ability to address enterprise use cases beyond security.
- **Innovation:** Forcepoint's planned innovations in application steering and single-vendor SASE management are unlikely to deliver a game-changing capability to the market.

Fortinet

Fortinet is a Leader in this Magic Quadrant. Its Fortinet Secure SD-WAN product includes FortiGate physical and virtual appliances with on-premises security software licenses managed with the FortiManager Orchestrator. Gartner estimates that Fortinet has approximately 31,000 SD-WAN enterprise customers and it operates globally, addressing customers across most verticals and company sizes. Over the next 18 months, we expect the vendor will invest in unified management of digital experience monitoring with SD-WAN, an AI-based assistant powered by ChatGPT, and enhanced internet and application performance, providing customers with an improved experience.

Strengths

- **Product:** Fortinet offers a strong set of features centered on integrated security with its SD-WAN offering that provides a simplified consumption approach for customers.

- **Innovation:** Fortinet’s planned innovations in GenAI and “as a service” consumption models have an above-average chance of delivering game-changing capabilities to the market.
- **Sales execution:** Fortinet has strong market share, robust channels and extremely competitive pricing.

Cautions

- **Customer experience:** According primarily to Gartner client interactions, Fortinet’s customer experience is below average.
- **Networking capabilities:** Some large global clients express concerns regarding Fortinet’s ability to meet the requirements of complex enterprise networking configurations and architectures.
- **SSE integrations:** Fortinet has limited integrations with third-party SSE vendors, which reduces enterprise choice when deploying a dual-vendor SASE architecture.

HPE (Aruba)

Hewlett Packard Enterprise (Aruba) is a Leader in this Magic Quadrant. Its SD-WAN offerings include Aruba EdgeConnect SD-WAN (with optional WAN optimization) and Aruba EdgeConnect SD-Branch, which include physical and virtual appliances, and software licenses with management and orchestration. Both products are managed through the Aruba Central platform. Gartner estimates that HPE (Aruba) has approximately 5,000 SD-WAN enterprise customers and its operations are global, addressing clients of all sizes and verticals. Over the next 18 months, we expect the vendor will invest in integrating its recent Axis Security acquisition for single-vendor SASE, a unified fabric across all its SD-WAN products and expand its cellular WAN offerings.

Strengths

- **Customer experience:** Compared with other vendors in this research, the vendor’s customer experience is high, based primarily on Gartner client interactions and Gartner Peer Insights data.
- **Product:** HPE (Aruba) has an above-average product when compared with other vendors in this research, based on its performance optimization, cloud onramp and operational capabilities, which align with current customer needs.
- **Market responsiveness:** HPE (Aruba) has a proven track record of delivering capabilities such as cloud integrations, SSE integrations and new consumption models to the SD-WAN market when they are needed.

Cautions

- **Innovation:** The vendor’s planned innovations in its unified fabric and single-vendor SASE functionality are unlikely to deliver game-changing capabilities to the market.
- **Geographic strategy:** The vendor’s geographic strategy lacks details, compared with other vendors in the research, which may limit its ability to reach certain customers based on location.

- **Multiple SD-WAN products:** HPE (Aruba) has multiple products that service different use cases. This may result in customer or prospect confusion, and introduce the risk of selecting the wrong offering.

Huawei

Huawei is a Challenger in this Magic Quadrant. It offers Huawei SD-WAN Solution, which includes the NetEngine AR series physical and virtual routers and software licenses, as well as the iMaster NCE-Campus controller. The vendor also offers HiSecEngine USG security gateways that address some SD-WAN use cases where strong security is required. Gartner estimates that Huawei has approximately 35,000 SD-WAN enterprise customers. It focuses on China specifically, and select countries in the Asia/Pacific region, EMEA and Latin American regions, addressing customers of all sizes and verticals. Over the next 18 months, we expect Huawei will invest in its cloud router, AI predictive route selection, and AI-based IoT terminal authorization and access.

Strengths

- **Customer experience:** Huawei has above-average customer experience, based on Gartner interactions and Gartner Peer Insights data.
- **Product strategy:** Huawei's product strategy is aligned with the current and future needs of enterprise SD-WAN customers, including integrated security, scalability, small platform flexibility and deployment flexibility, which bodes well for its future prospects in this market.
- **Sales execution:** Huawei's sales execution is strongly driven by a robust channel and a comparably lower-priced option, when compared with other vendors in this research, which is attractive for price-sensitive organizations.

Cautions

- **Market presence:** Huawei doesn't address organizations in the U.S., Canada, U.K., Australia and India markets due to geopolitical issues. The vendor has limited market awareness outside the Asia/Pacific region, which limits its ability to grow.
- **Innovation:** Huawei's recent and planned innovations in SD-branch, cloud and videoconferencing optimization functionality are unlikely to deliver game-changing capabilities to the market.
- **Market investment:** Huawei has lower expected investment growth in the SD-WAN market compared with other vendors in this research.

Juniper Networks

Juniper Networks is a Visionary in this Magic Quadrant. It offers Juniper AI-Driven SD-WAN, which includes the Session Smart Router, Session Smart Networking software, WAN Assurance and Marvis Virtual Network Assistant. It also offers the SRX Series for specific use cases. Gartner estimates Juniper has approximately 3,000 SD-WAN enterprise customers, and focuses its operations in the North American, EMEA and Asia/Pacific regions. The vendor addresses

companies of all sizes in most verticals, primarily focusing on its full-stack offering that integrates SD-WAN, LAN, WLAN and security into a common orchestration. Over the next 18 months, we expect Juniper Networks will invest in AI-based functionality and both single-vendor and dual-vendor SASE.

Strengths

- **Product strategy:** Juniper Networks has a solid product roadmap that aligns with emerging SD-WAN customer requirements driven by a focus on AIOps to optimize operations.
- **Innovation:** The vendor's planned innovations in AIOps functionality have an above-average chance of delivering a game-changing capability.
- **Customer experience:** Juniper Networks has solid customer experience, according primarily to Gartner SD-WAN interactions.

Cautions

- **Sales execution:** Juniper Networks has narrow SD-WAN channels and limited SD-WAN market share.
- **Market visibility:** The vendor has limited SD-WAN market visibility, based on end-user Gartner interactions and searches on gartner.com.
- **Market responsiveness:** Juniper Networks has been slow to address certain key features in this market, such as cloud provider integrations.

Nuage Networks

Nuage Networks from Nokia is a Niche Player in this Magic Quadrant. Its offering includes Virtualized Services Platform (VSP), which is typically deployed as a cloud-managed service (Nuage Cloud Managed SD-WAN service), but can also be deployed on-premises (Nuage Managed SD-WAN Service). It includes Network Services Gateways (NSG) with corresponding software. Gartner estimates that Nuage Networks has approximately 3,500 SD-WAN enterprise customers and operates globally, primarily through carrier channels, addressing customers of all sizes and most verticals. Over the next 18 months, we expect Nuage Networks will invest in an SD-Internet service for the SMB market.

Strengths

- **Customer experience:** Nuage Networks has above-average customer experience, compared with other vendors in this research.
- **SSE integrations:** The vendor has solid third-party SSE integrations, compared with other vendors in this Magic Quadrant, which supports dual-vendor SASE architectures.
- **Viability:** Nuage Networks has high viability, with a likelihood to invest going forward when compared with other vendors in this research.

Cautions

- **Innovation:** Nuage Networks' planned innovation in an SD-Internet offering for SMB customers is unlikely to deliver a game-changing capability to the enterprise market.
- **Market visibility:** Nuage Networks has low market visibility among enterprises, based on end-user Gartner client interactions, searches on gartner.com and Google, and overall evaluation of social media conversations.
- **Product:** The vendor has a below-average product compared with other vendors in this research, based on limited performance optimization, routing and application steering, as well as cloud onramp capabilities.

Palo Alto Networks

Palo Alto Networks is a Leader in this Magic Quadrant. Its leading offering is Prisma SD-WAN, which includes Instant-On Network (ION) edge appliances and orchestration. It also offers the PAN-OS branch firewall with limited SD-WAN capabilities as an upgrade option for existing NGFW customers. Gartner estimates the vendor has approximately 3,500 SD-WAN enterprise customers and operates globally, focusing on enterprises in all vertical industries and sizes. Over the next 18 months, we expect Palo Alto Networks will invest in application acceleration, SASE enhancements and line conditioning, including FEC and packet duplication.

Strengths

- **Innovation:** Palo Alto Networks' recent and planned innovations in AIOps, visibility and granular policy control have a high chance of delivering game-changing capabilities to the market.
- **Customer experience:** Palo Alto Networks has above-average customer experience, based primarily on Gartner interactions and Gartner Peer Insights data, compared with other vendors in this research.
- **Market understanding:** Palo Alto Networks has demonstrated a strong market understanding of both current and future customer requirements when compared with other vendors in this research.

Cautions

- **Pricing:** Palo Alto Networks has high SD-WAN pricing, as observed via Gartner client interactions.
- **Performance optimization:** Palo Alto Networks has limited performance optimization, such as TCP protocol optimization, FEC, packet duplication and broader WAN optimization capabilities.
- **Multiple SD-WAN products:** The vendor has two different SD-WAN products, which introduces market confusion. Customers are required to choose between a strong on-premises security offering with limited SD-WAN functionality or a strong SD-WAN offering with limited on-premises security functionality.

Peplink

Peplink is a Niche Player in this Magic Quadrant. It has two product families in this market: Balance for enterprise branch SD-WAN, and MAX for industry and mobility SD-WAN requirements. Both offerings include SpeedFusion software technology and InControl 2 orchestration for management. Gartner estimates Peplink has approximately 6,000 SD-WAN enterprise customers and operates globally, focusing on midmarket organizations, with specific verticals targeting wireless WAN use cases. Over the next 18 months, we expect Peplink will invest in Peplink Connectivity Controller to improve application performance, SpeedFusion cloud service and long-range antenna integration into its 5G routers.

Strengths

- **Viability:** Peplink has strong viability, with a likelihood to invest going forward, which increases its chance for future growth.
- **Vertical strategy:** Peplink is focused on its targeted verticals to reach organizations that fit its target profile of wireless-WAN-first use cases.
- **Marketing strategy:** Peplink has a focused marketing strategy that targets wireless WAN use cases for enterprise customers.

Cautions

- **Product and product strategy:** Peplink's product and product strategy are not aligned with current and future enterprise buyer requirements that don't require a wireless WAN offering.
- **Market visibility:** Peplink has limited market visibility, based on end-user Gartner interactions, searches on gartner.com and social media conversations.
- **Sales execution:** The vendor has limited SD-WAN market share and limited direct sales resources, which may impact its ability to grow in the market.

Sophos

Sophos is a Niche Player in this Magic Quadrant. It offers Sophos Firewall, which integrates both SD-WAN and NGFW capabilities on a single XGS Series appliance as part of an orchestrated offering. Gartner estimates that the vendor has approximately 18,000 SD-WAN enterprise customers and operates globally, focusing primarily on smaller and midmarket organizations with security-first use cases. Over the next 18 months, we expect Sophos will invest in integrating its ZTNA connector on the Sophos Firewall, adding scale to its SD-WAN offering and also adding adaptive FEC.

Strengths

- **On-premises security:** Sophos has a strong on-premises security capability integrated with its SD-WAN offering that simplifies consumption for smaller organizations.
- **Midmarket focus:** Sophos focuses on midmarket and smaller customers with features and functionality that address that target buyer. It also has a strong incumbency of security

customers that can be upgraded to SD-WAN.

- **Pricing:** The vendor offers competitive SD-WAN pricing when compared with the other vendors in this research, which is attractive to price-conscious organizations.

Cautions

- **Market visibility:** Sophos has limited SD-WAN market visibility with enterprise customers and prospects, based on Gartner interactions, searches on gartner.com and social media analytics.
- **Product:** Sophos' product lacks functionality such as limited third-party SSE integrations, cloud onramp and operational features.
- **Product strategy:** The vendor's go-forward product strategy is not aligned with many larger enterprise organizations with complex requirements, including performance optimization and routing and traffic steering.

Versa Networks

Versa Networks is a Leader in this Magic Quadrant. It has two offerings: The primary one is Secure SD-WAN, and the second offering is Versa Titan, built on the same platform as Secure SD-WAN and delivered as a cloud-based offering. Both include Cloud Services Gateway appliances or virtual appliances, software licenses, and orchestration. Gartner estimates that Versa Networks has approximately 24,000 SD-WAN enterprise customers and operates globally, addressing clients of all sizes and in all vertical industries, primarily through service providers. Over the next 18 months, we expect the vendor will invest in expanding its AI capabilities, observability and extending multicloud support integrated with SD-WAN orchestration.

Strengths

- **Product:** Versa Networks provides a fully capable SD-WAN offering with strong routing and application steering, security, cloud onramp, and deployment flexibility functions.
- **Product strategy:** The vendor has a strong roadmap of planned product capabilities that align with current and emerging customer requirements, such as AI networking, observability and multicloud support.
- **Market responsiveness:** Versa Networks has demonstrated the ability to deliver new capabilities on time and to respond to competitive market dynamics.

Cautions

- **Pricing:** Versa Networks has higher pricing for Secure SD-WAN, based on Gartner analyst assessment and Gartner Peer Insights data, which makes the offering more difficult to procure for some buyers.
- **Multiple SD-WAN products:** The vendor offers two products with different capabilities, so there is a risk of choosing the wrong product based on customer requirements.
- **Geographic strategy:** Versa Networks has a limited geographic strategy, which reduces its appeal to customers in some regions/countries.

VMware

VMware is a Leader in this Magic Quadrant. It offers VMware SD-WAN, which includes Edge appliances, optional gateway points of presence (POPs), software licenses and a cloud-based orchestrator. Gartner estimates that VMware has approximately 18,000 SD-WAN enterprise customers and operates globally, serving clients of all sizes and in all vertical industries, with a go-to-market focused on service providers. Over the next 18 months, we expect VMware to make future investments in SD-WAN Cloud Transport (enterprise private connectivity); integrating security, edge computing, private 5G and SD-WAN into a single platform, and AI-based digital experience assurance and analytics.

Broadcom announced its intention to acquire VMware on 26 May 2022. At the time of this evaluation, however, Broadcom and VMware operate as separate entities. Gartner will provide further insight as more detail becomes available.

Strengths

- **Product strategy:** VMware has a strong roadmap of planned product capabilities that align with current and emerging customer requirements, such as cloud transport and AI functionality. The pending Broadcom acquisition did not factor into this analysis.
- **Customer experience:** VMware has strong customer experience, according to Gartner client interactions, Gartner Peer Insights data and the vendor's Net Promoter Score.
- **Market visibility:** The vendor has strong SD-WAN market visibility, based on end-user Gartner client interactions, searches on gartner.com and Google, and overall evaluation of social media conversations.

Cautions

- **On-premises security:** VMware lags behind other vendors in this research in terms of integrated security features natively available in its on-premises appliances. The pending Broadcom acquisition, which includes the Symantec security assets, did not factor into this analysis.
- **Market investment:** VMware has lower expected investment growth in the SD-WAN market, compared with other vendors in this research. The pending Broadcom acquisition did not factor into this analysis.
- **SD-branch:** The vendor doesn't have a native SD-branch offering integrating WLAN, LAN, network security and SD-WAN into a single platform. This limits VMware's ability to sell to small branch locations where customers are looking for operational simplicity.

Vendors Added and Dropped

We review and adjust our inclusion criteria for Magic Quadrants as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant may change over time. A vendor's appearance in a Magic Quadrant one year and not the next does not necessarily indicate that we

have changed our opinion of that vendor. It may be a reflection of a change in the market and, therefore, changed evaluation criteria, or of a change of focus by that vendor.

Added

- Sophos was added because it met the inclusion criteria, based on our assessment and data provided by the vendor.

Dropped

- Citrix was dropped because it publicly announced its intention to exit the market in late 2022.

Inclusion and Exclusion Criteria

For Gartner clients, Magic Quadrant research identifies and analyzes the most relevant providers and their products in a market. Gartner uses, by default, an upper limit of 20 providers to support the identification of the most relevant providers in a market. On some specific occasions, the upper limit may be extended where the intended research value to our clients might otherwise be diminished.

The inclusion criteria represent the specific attributes that analysts believe are necessary for inclusion in this research.

To qualify for inclusion, vendors need to show relevance to Gartner clients by:

- Providing products/services that address the enterprise SD-WAN requirements outlined in the Market Definition/Description section.
- Producing and releasing enterprise SD-WAN products for general availability as of 9 June 2023. All components must be publicly available, be shipping and be included on the vendors' published price list as of this date. Products shipping after this date, and any publicly available marketing information may only have an influence on the Completeness of Vision axis.
- Providing commercial support and maintenance for their enterprise SD-WAN products (24/7) to support deployments on multiple continents. This includes hardware/software support, access to software upgrades, security patches, and troubleshooting and technical assistance.

Product Capabilities

Vendors must have generally available products that support all of the following capabilities:

- The ability to operate as the branch office router (including BGP, OSPF, support hub and spoke, mesh, and partial mesh topologies with automation for a minimum of a 250-site network) with traffic shaping and/or QoS
- Centralized management/orchestration and automation for devices (with GUI), including reporting, troubleshooting, configuration changes and software upgrades
- Zero-touch configuration

- VPN (Advanced Encryption Standard [AES] 256-bit encryption) with basic Layer 4 firewall
- Application-aware path selection based on business or application policy (not limited to only DiffServ Code Point [DSCP]/ports, IPs/circuits or 5tuple) that responds to network conditions (e.g., changes in packet loss, latency, jitter, etc.) in an active/active configuration
- Autodiscover at least 200 well-known application profiles
- Visibility of application performance data of traffic delivered across the WAN (e.g., packet loss, latency, jitter, etc.)
- Demonstrated service chaining capabilities with third-party solutions
- Ability to completely/fully support a do-it-yourself (DIY) customer
- Software that can be deployed in at least two cloud providers (such as AWS and Azure)

Business/Financial Performance

Vendors must show relevance to Gartner's enterprise clients by meeting the following with their SD-WAN solution(s) that meet the product capabilities inclusion criteria (from above):

- Proven success in addressing at least three of the five use cases identified in **Critical Capabilities for SD-WAN**.
- Meet either of the following criteria:
 - At least 50,000 SD-WAN enterprise sites deployed and under active support contracts*
 - At least 1,000 SD-WAN enterprise customers deployed and under active support contracts*
- Demonstrate baseline scalability and customer adoption by servicing at least 50 enterprise customers with active support contracts that have at least 100 sites each.*
- Show relevance to Gartner's enterprise clients on a global basis with at least 150 SD-WAN enterprise customers under active support contracts and headquartered in two or more of the following geographic regions: North America, South America, EMEA or Asia/Pacific. This means 150 enterprise customers with headquarters in one region and another 150 enterprise customers with headquarters in a different region for a total of at least 300 enterprise customers between the two regions.*
- Rank among the top 20 organizations in the Customer Interest Indicator (CII) defined by Gartner for this Magic Quadrant. Data inputs used to calculate SD-WAN CII included a balanced set of measures:
 - Gartner end-user inquiry volume per vendor
 - Gartner.com search data

- Vendor mentions in Peer Insights as a competitor
- Google Trends data
- Social media analysis

** Enterprise is defined as an organization with at least \$50 million in revenue and/or 100 employees. It can be a private for-profit organization or not-for-profit entities such as charitable organizations, government and education institutions.*

Sites are defined as organization locations of customers.

Customers are entities paying for an SD-WAN solution under active support contracts with features defined in the product inclusion criteria section. This excludes trials, proofs of concept (POCs), paid pilots, "try and buys," lab trials, etc.

Evaluation Criteria

Ability to Execute

Product or Service: This evaluates vendors by looking at their overall SD-WAN networking portfolios across the following areas:

- Routing and application steering
- On-premises security (local)
- Partner-integrated cloud security
- Performance optimization
- Operational capabilities
- Deployment flexibility
- Small platform flexibility
- Scalability
- Cloud onramp
- Integrated WAN backbone

We focus on the vendor's products that meet the inclusion criteria.

Overall Viability: This is an assessment of the overall organization's financial health, and the financial and practical success of the business unit. It includes our evaluation of the likelihood that the individual business unit will continue investing in the product, and offering the product, and will advance the state of the art within the organization's portfolio of products.

Sales Execution/Pricing: This assesses the vendor’s capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support, and the overall effectiveness of the sales channel. The first aspect evaluates sales effectiveness and go-to-market activities along with the depth and breadth of sales channels. The second aspect of this criterion includes our evaluation of the cost-effectiveness of the solutions for purchase and support over their useful life, and the ability to recognize and position the most appropriate solution in specific sales situations. These aspects are weighted roughly the same in our analysis.

Market Responsiveness/Record: This assesses the vendor’s track record in delivering new capabilities when the market needs them in terms of on-time with the right scope. This criterion also considers the vendor’s history of responsiveness in terms of changing market demands and addressing limitations. This evaluation is not limited to products, as it also involves pricing, licensing, operating models, go-to-market and overall competition dynamics.

Marketing Execution: This focuses on how the vendor is perceived in the market, and how well its marketing programs are recognized. The evaluation focuses on how well the vendor is able to influence and shape perception in the market through marketing activities and thought leadership that drives awareness. An additional indicator for this criterion is how often Gartner clients inquire about a specific vendor in terms of capabilities/reputation or in a shortlist evaluation process.

Customer Experience: This looks at all aspects of the customer experience inclusive of pricing, setup, day-to-day production, product features and support. This includes the customer’s experience with the vendor’s SD-WAN products and services used in their production environments. It also includes the ability to upgrade software and work with technical support to solve problems. Hardware and software quality and how existing customers describe their experience with the vendor’s products are also evaluated. Additionally, we assess customer satisfaction, customer loyalty/retention, brand reputation and advocacy, operational quality, and employee engagement.

Table 1: Ability to Execute Evaluation Criteria

| Evaluation Criteria ↓ | Weighting ↓ |
|------------------------------|--------------------|
| Product or Service | High |
| Overall Viability | Medium |
| Sales Execution/Pricing | High |
| | |

| Evaluation Criteria ↓ | Weighting ↓ |
|------------------------------|--------------------|
| Market Responsiveness/Record | Low |
| Marketing Execution | Medium |
| Customer Experience | High |
| Operations | NotRated |
| | |

Source: Gartner (September 2023)

Completeness of Vision

Market Understanding: This assesses the vendor’s ability to look into future needs and drive new ideas into product roadmaps and offerings, taking into account market needs and competitor strengths/weaknesses, and identifying new competitors and vendor core competencies. It also involves vendor self-reflection to determine gaps as well as strengths and weaknesses. We look at the vendor’s ability to address the challenges associated with distributed branch office locations. This may include, but isn’t limited to, specific functionality required such as simplifying operations, enhancing application performance, providing robust security, enhancing connectivity to the cloud, how to reach/attract end customers and pricing models.

Marketing Strategy: This evaluates the ability of the vendor to influence the market through its messaging and marketing campaigns. This includes the extent to which the vendor articulates a forward-looking marketing message that is clear, consistent, relevant and differentiated, as well as aligned with future end-user needs. We look for new and effective ways that vendors reach customers and evolving customer personas, and how they plan to communicate their message to drive market demand.

Sales Strategy: This assesses the vendor’s current and proposed use of direct and indirect sales to extend the scope and depth of its market reach. Further, this includes the extent to which the vendor articulates a clear, consistent, relevant and differentiated sales strategy that engages with defined customer profiles. This also includes development of effective go-to-market strategies, alliances and partnerships, leveraging value-added resellers (VARs), systems integrators (SIs), ISP aggregators, master agents, network service providers (NSPs), managed network service providers and OEM resellers, as appropriate. In addition, it includes how the vendor leverages new

pricing, consumption and business models that are emerging due to market and technology transitions.

Offering (Product) Strategy: This evaluates the vendor’s product roadmap around existing and future SD-WAN functions. It includes not just the raw features and capabilities, but also the vendor’s overall architecture across the portfolio, the uniqueness of the capabilities and the value to the end customer. We evaluate product strategy in terms of various capabilities, including (but not limited to) simplicity, automation, cloud connectivity, visibility, AI networking, application performance and security. This also includes the overall portfolio across different products.

Vertical/Industry Strategy: This measures the vendor’s ability to address the unique requirements of particular verticals/industries and to employ the associated sales channels, messaging and product features to build a sustainable business advantage.

Innovation: This evaluates the plans to bring future differentiated capabilities to market that will enhance the vendor’s ability to interact with customers and drive business. We assess the vendor’s ability to add value to customers in new, unique ways and/or to solve existing challenges in a more effective manner. Innovation is not simply a list of new features/functionality or product improvements. Instead, it is the ability to bring capabilities to the market that dramatically alter or shift the conversation among buyers. True innovation often changes the “tenor” of a market in terms of customers. Innovation can be created across multiple areas, including product, packaging, pricing, sales, marketing, models and use cases.

Geographic Strategy: This measures the vendor’s ability to address any unique requirements of particular geographies and to employ the associated messaging, partnerships and product features, as well as sales channels, to build a sustainable business advantage.

Table 2: Completeness of Vision Evaluation Criteria

| <i>Evaluation Criteria</i> ↓ | <i>Weighting</i> ↓ |
|-------------------------------------|---------------------------|
| Market Understanding | Medium |
| Marketing Strategy | Low |
| Sales Strategy | Medium |
| Offering (Product) Strategy | High |
| Business Model | NotRated |

| Evaluation Criteria ↓ | Weighting ↓ |
|------------------------------|--------------------|
| Vertical/Industry Strategy | Low |
| Innovation | High |
| Geographic Strategy | Low |

Source: Gartner (September 2023)

Quadrant Descriptions

Leaders

A Leader has demonstrated a sustained ability to address changing end-user requirements in the SD-WAN market as well as long-term viability. A Leader can drive, shape and transform the market in areas such as AI networking, SASE or NaaS, as well as maintain strong relationships with its channels and customers. Leaders typically have solid products that address most use cases across various verticals globally, maintain high visibility among Gartner clients and demonstrate success while at the same time innovating to drive the market forward.

Challengers

A Challenger has demonstrated sustained execution in the SD-WAN market, and has clear, long-term viability in the market. Typically, Challengers have solid products that address most use cases across multiple verticals in various geographies. However, a Challenger has not shown the ability to drive, shape and transform the market.

Visionaries

A Visionary has strong potential to drive and shape the market going forward in some key areas of SD-WAN, such as AI networking, SASE or NaaS. Visionaries often help transform the market – from driving new ideas/innovations, including new business models, to solving enterprise challenges. Although Visionaries often transform the market, they typically lack market share, viability, global coverage and/or complete product capabilities to address most use cases.

Niche Players

A Niche Player has a complete or near-complete SD-WAN product offering, but is more focused, such as on geographic reach or vertical market concentration, typically resulting in limited market share or limited addressable use cases. Niche Players have a viable product offering, but have not shown the ability to transform the market or sustain execution.

Context

Market Forecast

The SD-WAN market is forecast to generate a compound annual growth rate (CAGR) of 14.6% in end-user spending from 2022 through 2027 (see [Forecast Analysis: Enterprise Network Equipment, Worldwide](#)). This is based on a current SD-WAN market penetration of about 60% in 2023.

Gartner expects some aspects of the SD-WAN market to evolve into the single-vendor SASE market (see [Magic Quadrant for Single-Vendor SASE](#)), with integrated network security (SSE) delivered from the cloud. More broadly, we see five technologies converging:

- SD-WAN
- SSE
- Enhanced internet/WAN backbone
- Cloud onramp
- Multicloud networking

Trends

Current Trends

Convergence of Networking and Security

Today, we primarily see SD-WAN and SSE offerings being integrated and deployed as dual-vendor SASE. This is largely driven by the move to distribute internet access to support cloud applications and change the security perimeter. This goes along with the deployment of SD-WAN at branch locations to manage the internet transport. As part of a desire to minimize branch sprawl and support access to the cloud, we observe more organizations looking for integrated cloud-delivered security and thin branch SD-WAN solutions (see [2022 Strategic Roadmap for SASE Convergence](#)). Dual-vendor SASE is more popular in the near term since there is a significant deployment of either SD-WAN or SSE and buyers are looking to add the offering not currently deployed. Oftentimes, a different vendor is chosen from the original deployment to complete the solution due to different requirements. Over time, we expect this to evolve into single-vendor SASE (see the Future Trends section).

Cloud Onramp

There are various ways to connect to cloud workloads (IaaS, PaaS or SaaS) where SD-WAN offerings enable integration, automation and orchestration (see [How to Optimize Network Connectivity Into Public Cloud Providers](#)) to simplify configuration and management. Options include:

- Connecting via carrier-neutral colocation providers, such as Equinix, in a DIY model primarily for multicloud connectivity.

- Leveraging software-defined cloud internet (SDCI) providers, such as Megaport, to connect to various cloud workloads with a turnkey managed service.
- Using cloud hubs by backhauling traffic to a centralized location, leveraging a high-quality connection to a cloud service provider (e.g., Direct Connect or ExpressRoute).
- Internet access from the branch to connect to cloud service providers. SD-WAN offerings can be virtualized and deployed in public cloud providers to provide visibility and terminate traffic in the cloud by treating the instance as a node on the WAN.

Internet as WAN

Many Gartner clients hope to fund their WAN expansion/updates by replacing or reducing the bandwidth of MPLS connections with internet-based WANs. However, the suitability of internet connections varies by geography, access type and oversubscription levels, and service providers mixing connections from multiple vendors increases management complexity. Furthermore, in some regions, dedicated internet can be roughly the same price as MPLS, so the driver is as much about agility and flexibility as it is about price. While we observe that most SD-WAN migrations include hybrid WANs with MPLS and internet connectivity, there is increasing adoption of all internet-based WANs.

SD-Branch

Gartner increasingly sees vendors building a common orchestration among LAN, WLAN, WAN and network security, which is known as SD-branch (and also universal ZTNA). It offers simplicity in managing LAN, WLAN, WAN and network security policies and profiles with a single orchestrated solution. Integrating these domains will increasingly be a differentiating factor for some vendors in specific verticals such as retail. Although Gartner still sees customers procuring LAN/WLAN separate from WAN, there is evidence that this may change for certain customer environments.

Future Trends

AI Networking

There is a trend toward more autonomous and self-driving networks in which AI/ML technologies can be leveraged to make networking decisions without or with limited human intervention (see [Innovation Insight: AI Networking Has the Potential to Revolutionize Network Operations](#)). While much of this is aspirational today, the objective is to make networking easier for design and configuration/deployment, with simplified ongoing management to reduce operating expenditures (opex), increase speed/agility and improve uptime/performance. Although it is still early in many vendors' product development, we are seeing this functionality incorporated into an increasing number of vendor solutions offering differentiation. The longer-term challenge will be customer trust in using such solutions.

Convergence of Five Adjacent Technologies

Formerly, applications were hosted in the data center, and demarcation points were the branch to the data center and the organization had control over the data center. With the move of more

applications to the cloud (SaaS, IaaS and PaaS), we have identified five adjacent markets that we envision converging:

- SD-WAN
- SSE (see [Magic Quadrant for Security Service Edge](#))
- Enhanced internet/integrated WAN backbone (see [Include Enhanced Internet as a Viable Option for the Global SD-WAN Backbone](#))
- Cloud onramp (see [How to Optimize Network Connectivity Into Public Cloud Providers](#))
- Multicloud networking software (see [Market Guide for Multicloud Networking Software](#))

We already see SD-WAN and SSE converging to form SASE as part of the overall technology convergence with the aim of providing a simpler and integrated solution for the end user. Beyond that, the other technologies are converging in multiple ways as there is no single combination that is dominant. Buying patterns are inconsistent, as well; we don't see demand for all five together today, but expect it to increase with supplier availability.

Single-Vendor SASE

Enterprise SASE adoption is currently dominated by multivendor solutions (one vendor for networking and one for security), with some type of orchestration tying it together. Over time, we expect to see more single-vendor, integrated SASE solutions incorporating the SSE and SD-WAN branch components (see [Magic Quadrant for Single-Vendor SASE](#)). As the single-vendor SASE market matures, we expect the capabilities gap to close with best-of-breed dual-vendor SASE architectures and organizations to consolidate networking and network security roles, which will drive the purchase of a single offering. We also expect to see new pricing models as SD-WAN and network security offerings converge to more of a per-user model. This will simplify sourcing and offer a tighter technical integration, ultimately offering a better user experience.

NaaS

While not specific to SD-WAN per se, we do see new consumption options that can take advantage of a pure usage/metered/consumption model in terms of per-user or unit of bandwidth, in addition to more traditional subscription models. NaaS incorporates hardware, software and management as a consumption model where the customer doesn't own the equipment. It includes turnkey self-service and elastic demand options, including network refreshes to simplify consumption (see [What Is NaaS, and Should I Adopt It?](#)). While we don't expect this to be a dominant consumption model, we do see this as an option for organizations that want simplicity and a pure operating expenditure (OPEX)-friendly model.

Market Overview

The market is mainstream and maturing. The supply side remains a crowded, fragmented vendor landscape, with large established vendors and smaller providers from multiple segments competing for market share. There is separation from the top vendors in this space as we

estimate that the top 10 vendors make up over 80% of the market and the top six vendors make up over 60% of the market (see [Market Share: Enterprise Network Equipment by Market Segment, Worldwide, 2Q23](#)).

Market Drivers

The SD-WAN market is primarily driven by the following factors:

- Refresh of existing branch office router equipment (or first-generation SD-WAN equipment) that is at the end of support or lacks the desired capabilities.
- Renewal of NSP or managed service contracts, where a new service provider also means new equipment. This can drive the move off of MPLS in favor of internet access to the branch, with security perimeter changes that typically drive new solutions.
- Application rollouts with changing traffic patterns resulting from increased use of cloud and multicloud resources that render the traditional hub-and-spoke from remote branch to on-premises data center WAN architecture obsolete.
- The desire to increase scalability, agility and automation to address the needs of digital business transformation and reduce opex.
- The desire to consolidate more than one branch function, such as routing and security (e.g., SASE and zero trust).

Vendor Differentiation

Differentiation is mostly based on:

- **Feature-based** – This includes, for example, AI networking, cloud onramp, ease of use, security (on-premises, in-the-cloud or third-party SSE integrations), scale or performance optimization.
- **Go-to-market** – Vendors can focus by selling through a small number of large service providers, or focus on a large number of channel partners. Some focus more on DIY and others more on managed network services, while others are more balanced between the two. Still others are focused more on NaaS-based opex options over traditional capital expenditure (capex) pricing models.
- **Vertical focus** – These are vendors that focus on specific verticals, such as retail, financial, state and local government, etc., based on specific use cases and product focus.
- **Geographical focus** – These vendors focus on specific geographies where they can compete most effectively based on where they have resources, channels and unique product capabilities to meet the requirements of end users

Vendor Landscape Changes

We estimate that the SD-WAN market has about 70 suppliers, and more vendors are entering the market. Specifically, we anticipate multiple SSE vendors adding SD-WAN to their product portfolio within the next 18 months in order to compete for single-vendor SASE or differentiate among SSE competitors. We expect this market to remain crowded over the next few years, with continued merger and acquisition (M&A) activity.

Acquisitions are likely to continue primarily around SD-WAN and network security vendors consolidating to form single-vendor SASE. As we look out three years in the SD-WAN market, more than 10 mainstream suppliers are likely to remain. However, we do see increasing separation by the top six or eight vendors from the rest of the market, and an evolution to SASE as the primary use case.

Recent M&A activity in this market includes the announcement of Broadcom's intent to acquire VMware (announced in 2022), HPE (Aruba) buying Axis Security and Cradlepoint buying Ericom. Furthermore, Check Point Software Technologies launched its SD-WAN offering and Cloudflare announced plans to launch one as well.

Market Recommendations

I&O leaders responsible for building and managing WANs should:

- Build a WAN architecture that aligns with end users, branches and applications. This may mean a hybrid WAN with MPLS and internet, or internet only with dual internet. This depends on how many on-premises workloads versus cloud workloads exist, the types of applications, the number of users at a site and the locations of end users.
- Cloud-first organizations that heavily utilize public cloud and SaaS services should determine SD-WAN offering suitability by validating depth and/or breadth of cloud provider and cloud onramp integrations.
- When implementing a dual-vendor SASE architecture, lean toward SD-WAN/SSE combinations with deep explicit integration by performing a POC and focusing on the GUI integration as well as automatic traffic redirection.
- Operationally focused organizations should evaluate SD-WAN vendors by analyzing network automation and AI networking capabilities as a core requirement to improve support efficiency.
- Choose SD-WAN vendors to optimize application performance by evaluating performance optimization capabilities for real-time and non-real-time traffic, whether the applications are delivered on-premises or from the cloud.
- Shortlist at least two SD-WAN product vendors, whether for a new deployment or large renewal/refresh.
- Quantify the total cost of hardware, software and maintenance for an SD-WAN deployment. SD-WAN solutions more commonly have opex-friendly business models, with a strong shift from

upfront capex to annual license subscriptions. To perform a proper evaluation and comparison, quotes should include all platform, license and support costs over a three-year baseline.

- Prefer SD-branch solutions to simplify the management of LAN, WLAN, SD-WAN and security for small branch offices.
- Run a pilot to test the SD-WAN solution in a production capacity to validate performance in a real-world environment. Ensure that at least one critical site is tested with the solution deployed before any final decision is made.

Evidence

- Gartner analysts conducted about 2,000 Gartner end-user client interactions on the topic of WAN between June 2022 and June 2023.
- Gartner analysts conducted more than 1,500 Gartner end-user client interactions on the topic of SD-WAN between June 2022 and June 2023.
- Gartner analysts conducted about 1,200 Gartner end-user client interactions on the topic of SASE between June 2022 and June 2023.
- Vendors included in this research responded to an RFI created by Gartner analysts.
- Market size forecast sources are from [Forecast Analysis: Enterprise Network Equipment, Worldwide](#).
- Analysts reviewed Gartner Peer Insights data for this market. Gartner Peer Insights is a free peer review and ratings platform designed for enterprise software and service decision makers. Reviews go through a strict validation and moderation process in an effort to ensure they are authentic. Reviews from the SD-WAN market, submitted from June 2022 through June 2023, have been analyzed for the purpose of this research.
- Gartner analysts reviewed publicly available information online.
- **Social Media Analysis Methodology:** Gartner conducts social listening analyses leveraging third-party data tools to complement or supplement the other fact bases presented in this document. Due to its qualitative and organic nature, the results should not be used separately from the rest of this research. No conclusions should be drawn from this data alone. Social media data in reference is from 1 June 2022 through 13 June 2023 in all geographies (except China) and in recognized languages.
- **Sources Covered:** By default, social media sources considered for analysis include the X platform, formerly known as Twitter; Facebook (publicly available information only); aggregator websites; blogs; news; mainstream media; and forums and videos (comments only), unless and until specified.
- We considered data collected by Gartner's Branded Research Center of Excellence on customer interest in April 2023 from Gartner internal sources and external secondary sources.

- Gartner also referenced information from external/third-party sources to evaluate as part of this research.

Evaluation Criteria Definitions

Ability to Execute

Product/Service: Core goods and services offered by the vendor for the defined market. This includes current product/service capabilities, quality, feature sets, skills and so on, whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.

Overall Viability: Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood that the individual business unit will continue investing in the product, will continue offering the product and will advance the state of the art within the organization's portfolio of products.

Sales Execution/Pricing: The vendor's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support, and the overall effectiveness of the sales channel.

Market Responsiveness/Record: Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the vendor's history of responsiveness.

Marketing Execution: The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This "mind share" can be driven by a combination of publicity, promotional initiatives, thought leadership, word of mouth and sales activities.

Customer Experience: Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways customers receive technical support or account support. This can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups, service-level agreements and so on.

Operations: The ability of the organization to meet its goals and commitments. Factors include the quality of the organizational structure, including skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis.

Completeness of Vision

Market Understanding: Ability of the vendor to understand buyers' wants and needs and to translate those into products and services. Vendors that show the highest degree of vision listen to and understand buyers' wants and needs, and can shape or enhance those with their added vision.

Marketing Strategy: A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the website, advertising, customer programs and positioning statements.

Sales Strategy: The strategy for selling products that uses the appropriate network of direct and indirect sales, marketing, service, and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base.

Offering (Product) Strategy: The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature sets as they map to current and future requirements.

Business Model: The soundness and logic of the vendor's underlying business proposition.

Vertical/Industry Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments, including vertical markets.

Innovation: Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes.

Geographic Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries as appropriate for that geography and market.

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