

Network – Software-Defined Solutions and Services

A detailed analysis of the software-defined enterprise network, advisory, SASE and edge markets

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SD-networks are ubiquitous in Germany with modern and secure cloud-enabled enterprise networks

The changing environment of enterprise SD-networking in Germany

The realm of enterprise software-defined networking solutions and services is witnessing swift changes. This shift is driven by merging new technologies, business needs and organizational strategies that align with international trends such as the digitalization of enterprises, business restructuring, heightened security demands and the ongoing migration to cloud services.

This ISG Provider Lens™ report analyzes SD-networking solutions within the German market. The study explores a wide range of services and technologies, including managed software-defined wide area network (SD-WAN), transformation services (consulting and advisory), edge technologies

(including private enterprise 5G) and secure access service edge (SASE). The findings highlight Germany's pivotal position as a leading European country and one of the world's largest national consumers of SD-WAN solutions.

Germany's prominence in the international SD-networking scenario

Germany has become a key player in the European SD-WAN market, with many major global enterprises headquartered in the country that spread their requirements to standardize networks and solutions across all their global offices and operations. Over the past two years, the uptake in consumption has been enabled by systems integrators and network providers offering innovative and flexible solutions and consumption-based managed services models. Furthermore, an increasing number of small and midsize enterprises (SMEs), traditionally of high importance to Germany's GDP, are embracing SD-WAN solutions, further widening the market's penetration.

This evolution is in sync with worldwide trends in digital business transformation and multicloud adoption, reshaping

SD-networks
are **integral** to all
enterprise network
functionality and
security needs.



industry-specific and cross-industry solutions. Companies of all sizes pursue economical, adaptable and secure options to boost their competitive advantage and ensure business continuity while enhancing customer experience (CX) and optimizing resource utilization. Germany's consumption and provision of solutions in SD-WAN technology, edge computing, private 5G (P5G) and advanced security fortify its status as a leader in this field, with expectations for ongoing growth extending through an otherwise turbulent (economically) 2025.

The influence of SD-WAN on business transformation

SD-WAN is increasingly seen as vital for digital advancement among German companies. Its overlay technology lets businesses update their networks incrementally without replacing all existing hardware. This phased approach boosts performance and enables scalability over time. A *rip-and-replace* strategy is available for those seeking faster implementations to reduce disruptions.

SD-WAN is highly beneficial for cloud migration efforts because it manages various network types, including direct internet connections and multiprotocol label switching (MPLS) underlays. Its seamless cloud integration capabilities make SD-WAN essential to corporate cloud initiatives. The integration of SD-WAN within SASE is transforming IT strategies in enterprises. As an alternative to full SASE, when combined with security service edge (SSE), SD-WAN offers enhanced networking and robust security, making it a critical growth area in managed network services.

Key drivers of change in German business networks

Several key factors speed up German companies' network transformations:

- **Enhancing network adaptability and simplifying operations:** Businesses prioritize network adaptability paired with reduced complexity. SD-WAN, offered as a service (aaS), brings real-time analytics and centralized management through the cloud. This setup streamlines resource management and application deployment, reducing the need for regular hardware replacements. SD-WAN enables businesses to automate network functions using a centralized control system, enabling agile adaptation to business needs, improved performance and policy-driven configurations. This automation reduces complexity and ensures consistent performance networkwide.
- **Minimizing risk during cloud and multicloud transitions:** As companies migrate IT operations to the cloud, SD-networking assists these transitions with minimal disruptions. Its proficiency in orchestrating within multicloud environments while maintaining network oversight is a significant factor in its broad adoption. SD-networking simplifies processes and ensures secure data transfer across different cloud platforms, enabling businesses to maximize cloud-native technology usage. Thus, SD-networking is crucial for contemporary cloud strategies.

- **Strengthening network security:** In today's security-challenged digital landscape, businesses place high importance on security. SD-networking incorporates powerful security measures such as encryption, access control and spotting threats to protect network assets. The flexibility of SD-WAN facilitates its integration into SASE platforms, combining networking with cloud-centric security options such as firewalls, secure gateways and zero-trust access. This integration secures networks while maintaining high efficiency. For a modular approach, SD-WAN can be combined with SSE for comprehensive security without overhauling existing systems.
- **Promoting SD-networking adoption among SMEs:** In Germany, the uptake of SD-networking is growing among the powerful SME segment that seek cost-effective, scalable and secure networking solutions. By using cloud-based SD-networking, SMEs can access



advanced networking and security without hefty initial hardware costs. Usage-based pricing models make SD-WAN attractive to SMEs, allowing them to improve performance, security and connectivity while minimizing operating costs. This trend is particularly evident in sectors such as retail, where there is a demand for reliable and secure connections across dispersed teams and locations.

- **Driving innovation with emerging technologies:** The push to adopt new technologies, such as AI, generative AI (GenAI), ML, automation and intent-based networks, requires networks to be flexible and adaptable. SD-networking provides essential features to support these technologies, offering superior management, real-time adaptability and automation. Companies that leverage cutting-edge solutions such as advanced edge computing, self-healing network systems and 5G technology find that SD-networking offers a seamless and secure approach compatible with modern innovations. When managed

externally, these services eliminate the need for intensive employee training or frequent software upgrades, thus allowing organizations to concentrate on their strategic objectives.

Primary benefits of SD-networking

SD-networking brings several significant advantages to businesses in Germany in line with global offerings and effects observed:

- **Cost efficiency:** Implementing a pricing model based on usage and reduced reliance on hardware cuts operation and capital expenditures
- **Adaptability:** The adaptable nature of SD-networking makes it easy to incorporate new resources and applications, minimizing service interruptions
- **Defense:** Advanced security mechanisms protect against evolving cyberthreats
- **Simplicity:** By centralizing management and utilizing automation, businesses can streamline operations and reduce complexity

- **Encouragement of innovation:** Its compatibility with emerging technologies positions businesses for future growth and success.

The path forward for SD-networking in Germany

With Germany at the forefront of the European SD-networking transition and many major multinational corporations headquartered in Germany that have already adopted SD-networking, advancements in AI, automation and edge computing are set to accelerate adoption and further enhance SD-network capabilities. More companies are turning to SD-networking solutions to overcome digital transformation challenges, such as moving to the cloud, enhancing security and optimizing operational efficiency, including utilizing embedded AI effectively. Integrating networking with security using platforms such as SASE and SSE underscores the pivotal role of SD-networking in contemporary IT strategies.

Germany's commitment to pioneering advancements, supported by a strong ecosystem of service providers and technology vendors, ensures SD-networking remains essential to the ICT infrastructure of enterprises. Adopting these solutions empowers companies to navigate the intricacies of the digital age, foster innovation and achieve their key objectives in a more competitive and interconnected world.

In Summary

Germany's strengths in software-defined networking underscores its proficiency in adapting to evolving business and technological demands. Technologies like SD-WAN, SASE, and SSE with much use of AI embedded in solutions enable enterprises to enhance flexibility, bolster security, and expand their operations while optimizing processes and reducing costs. As innovations proceed, embracing new technologies and pioneering service models will firmly position SD-networking as an essential engine for business evolution.



Executive Summary

This review illustrates the profound impact of software-defined networking in transforming network technology infrastructure, driving innovation and preparing businesses for success in a digitally driven cloud-based and AI-enriched environment. Germany's persistent leadership in this sector will be critical in shaping the future trajectory of German, European and global enterprise networking.

SD-networking is an intrinsic functional foundation for the deployment and cloud enablement of all advanced network types, including wireless connectivity, delivering required functionality and flexibility cost-effectively while seamlessly integrating with major ICT security solutions or as a vital part of SASE migrations.





Provider Positioning

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	Managed SD-WAN Services	SD-Networks Transformation Services (Consulting and Implementation)	Edge Technologies and Services (Including Private 5G)	Secure Access Service Edge (SASE)
Accenture	Leader	Leader	Leader	Leader
Apcela	Not In	Product Challenger	Not In	Not In
Arista	Not In	Contender	Not In	Not In
Aryaka	Not In	Not In	Not In	Product Challenger
AT&T	Product Challenger	Not In	Not In	Product Challenger
Axians	Product Challenger	Leader	Leader	Product Challenger
Bechtle	Product Challenger	Product Challenger	Product Challenger	Product Challenger
BT	Product Challenger	Product Challenger	Product Challenger	Leader
CANCOM	Product Challenger	Product Challenger	Leader	Product Challenger
Capgemini	Not In	Product Challenger	Not In	Product Challenger





Provider Positioning

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	Managed SD-WAN Services	SD-Networks Transformation Services (Consulting and Implementation)	Edge Technologies and Services (Including Private 5G)	Secure Access Service Edge (SASE)
Cato Networks	Not In	Product Challenger	Product Challenger	Not In
C-C Solutions	Not In	Not In	Contender	Not In
Colt	Leader	Product Challenger	Not In	Leader
Comcast Business	Market Challenger	Not In	Not In	Market Challenger
Computacenter	Product Challenger	Leader	Leader	Leader
Controlware	Not In	Product Challenger	Contender	Contender
Damovo	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Deutsche Telekom	Leader	Leader	Leader	Leader
DXC Technology	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Extreme Networks	Not In	Not In	Product Challenger	Not In





Provider Positioning

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	Managed SD-WAN Services	SD-Networks Transformation Services (Consulting and Implementation)	Edge Technologies and Services (Including Private 5G)	Secure Access Service Edge (SASE)
GTT	Leader	Product Challenger	Not In	Not In
HCLTech	Rising Star ★	Leader	Leader	Rising Star ★
HPE Aruba	Not In	Not In	Market Challenger	Not In
Infosys	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Kyndryl	Product Challenger	Product Challenger	Product Challenger	Not In
Logicalis	Leader	Leader	Leader	Leader
Lumen Technologies	Product Challenger	Not In	Not In	Product Challenger
Mphasis	Not In	Not In	Product Challenger	Not In
NTT DATA	Not In	Market Challenger	Not In	Not In
Open Systems	Contender	Contender	Product Challenger	Contender





Provider Positioning

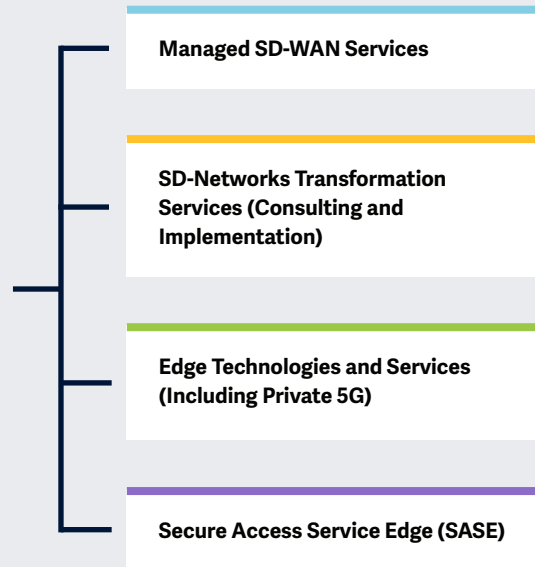
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	Managed SD-WAN Services	SD-Networks Transformation Services (Consulting and Implementation)	Edge Technologies and Services (Including Private 5G)	Secure Access Service Edge (SASE)
Orange Business	Leader	Leader	Leader	Leader
Riedel Networks	Leader	Not In	Not In	Not In
Tata Communications	Product Challenger	Not In	Not In	Product Challenger
TCS	Not In	Product Challenger	Product Challenger	Product Challenger
Tech Mahindra	Product Challenger	Leader	Leader	Product Challenger
Telefonica	Contender	Not In	Not In	Not In
Verizon Business	Leader	Not In	Not In	Leader
Vodafone	Leader	Leader	Product Challenger	Leader
Wipro	Leader	Leader	Leader	Leader



Analysis of SD-networks, edge and SASE solutions and services 2025

Simplified Illustration Source: ISG 2025



Definition

This ISG Provider Lens™ Network – Software Defined Solutions and Services 2025 study analyzes a variety of enterprise networks and software-defined networking offerings. It covers managed software-defined wide area network (SD-WAN) services available to enterprises, emphasizing fully managed solutions that incorporate the latest technologies and methodologies within a modern contractual framework. The research also explores transformational consulting and advisory services and supply and implementation support in the SD-WAN domain, focusing on key providers in this space. This study supports and accompanies the wider-ranging Enterprise Managed Network Services IPL from ISG ([Link](#)).

The study also examines edge technologies and services, such as IoT, universal/virtual customer premises equipment (u/vCPE) and software-defined local area network (SD-LAN) extending to branch locations and private mobile network delivery through 5G technologies. The analysis explores service offerings across these segments. The study

also investigates secure access service edge (SASE), a comprehensive and secure network environment that integrates SD-WAN and offers businesses a fully integrated secure solution for their networking needs.

ISG delivers a comprehensive research program with a clear and definitive evaluation criterion, covering the developments and deliverables of service providers and equipment suppliers in this dynamic marketplace. This study accounts changing market requirements and provides a complete market overview of the segments, along with concrete decision-making support to help user organizations evaluate and assess providers' offerings and performance.



Scope of the Report

This ISG Provider Lens™ quadrant report covers the following four quadrants for services/solutions: Managed SD-WAN Services, SD-Networks Transformation Services (Consulting and Implementation), Edge Technologies and Services (Including Private 5G) and Secure Access Service Edge (SASE).

This ISG Provider Lens™ study offers IT-decision makers:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments
- Focus on Germany market

This ISG Provider Lens™ study offers IT-decision makers: Our study serves as the basis for important decision-making in terms of positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their existing provider.

Provider Classifications

The provider position reflects the suitability of providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the service requirements from enterprise customers differ and the spectrum of providers operating in the local market is sufficiently wide, a further differentiation of the providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between \$20 million and \$999 million with central headquarters in the respective country, usually privately owned.

- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above \$1 billion, with activities worldwide and globally distributed decision-making structures.

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product & Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens™ quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

- **Number of providers in each quadrant:** ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).





Provider Classifications: Quadrant Key

Product Challengers offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/ services and a follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

★ **Rising Stars** have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not in means the service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.





Managed SD-WAN Services

Who Should Read This Section

This report is valuable for service providers offering managed SD-WAN services in Germany to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights providers' expertise in implementing enterprise SD-WAN solutions and services (including hybrid MPLS/IP or MPLS/SD-network options) in Germany, empowering enterprises to select the right partner for network transformation.

Networking professionals

Should read this report to learn about providers' detailed landscape, their integration capabilities and partnerships in effectively managing SD-WAN service consumption.

Digital transformation professionals

Should read this report to understand how managed SD-WAN service providers align with their enterprise transformation journey and compare with one another.

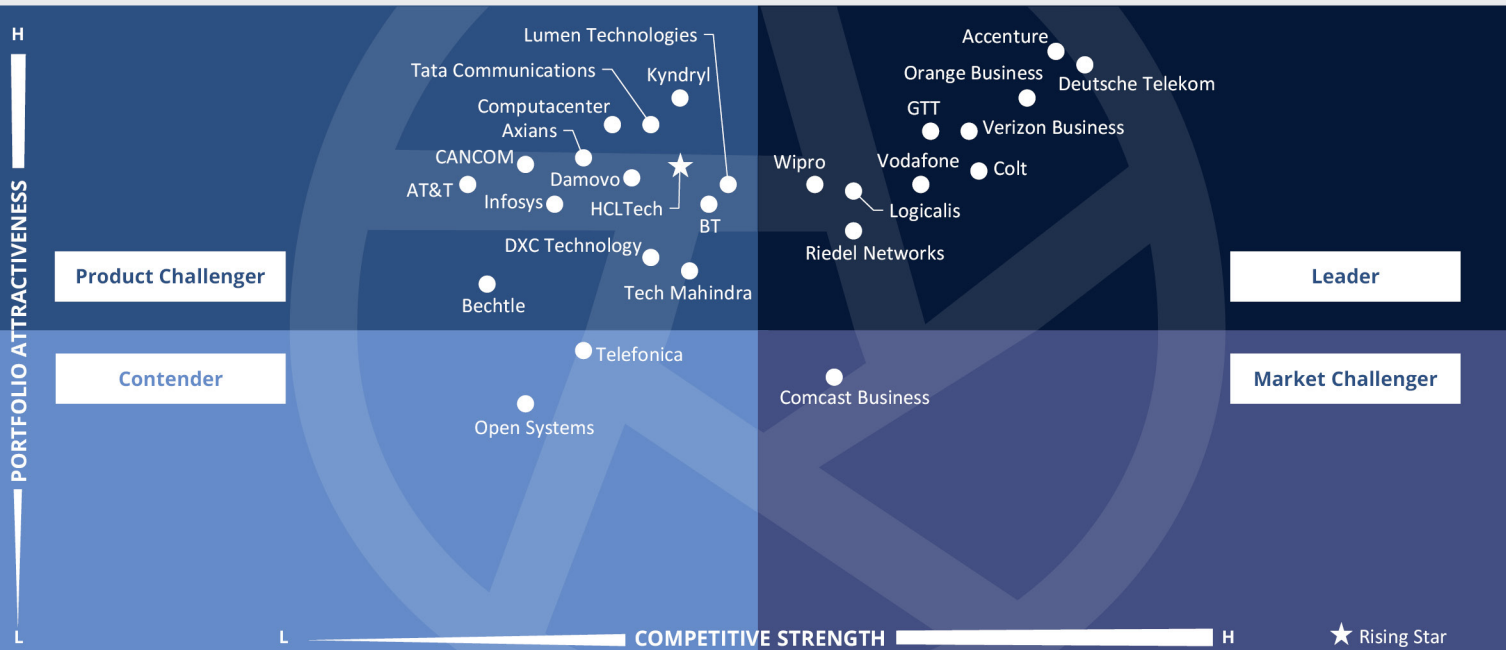
Cybersecurity professionals

Should read this report to gain insights into the current security capabilities of SD-WAN service providers' delivery.

Procurement professionals

Can acclimatize themselves with managed SD-WAN service providers' terms, covering SLAs and KPIs, including service and quality levels and pay-as-you-consume options.





This section assesses providers offering enterprises **managed SD-WAN solutions** and those delivering next-generation networks. It focuses on **providers offering managed or comanaged services, facilitating future-proof networking capabilities.**

Dr. Kenn D Walters

Managed SD-WAN Services

Definition

This quadrant focuses on managed enterprise SD-WAN solutions and service providers delivering these offerings to enterprises as fully managed or comanaged as-a-service solutions — regardless of the network hardware and software. SD-WAN solutions optimize network operations for enterprises from core to edge.

SD-WAN offers advantages over traditional hardware-based networking by leveraging its overlay architecture, with the control layer moved to the cloud. This centralization streamlines network management, making it flexible and agile. By abstracting software from hardware, SD-WAN enables network virtualization, reducing recurring network costs, enhances networkwide visibility and allows for AI-Driven optimization and zero-touch deployment with centralized management with orchestration and integration of partner offerings controlled at this level. Providers increasingly offer SD-WAN solutions (including hybrid MPLS/IP or MPLS/ SD-network options) within their larger strategic frameworks.

Eligibility Criteria

1. **Scope of the managed SD-WAN service portfolio**
2. **Ability to rapidly deliver and manage all hardware and software components**
3. **Ability to effectively replace or integrate** (as required) MPLS-based WANs with SD-WAN or hybrid systems
4. **Complete orchestration and management capabilities** for the needed control of the new
5. SD-WAN network including AI and Automation in Network Operations (AIOps)
6. **Proven capability** in seamlessly implementing new services and networks in commercial deployments
7. **Comprehensive and stable road mapping abilities**, allowing updates as required
8. Reference customer or cultural alignment or site **volume in deployment**
9. **Competitiveness** of offerings and types of commercial terms



Managed SD-WAN Services

Observations

Enterprise networking in Germany continues to witness significant growth in the adoption of managed SD-WAN as organizations continue to migrate to the cloud and emphasize AI, automation and network security. Initial do-it-yourself (DIY) SD-WAN solutions have seen a sustained decline across most sectors, primarily due to the rising complexity of modern enterprise networks, continued innovation impacting solution offerings, challenges in sustaining necessary internal resources and expertise to effectively self-manage and operate the ever-evolving SD-WAN solutions.

Providers of managed SD-WAN solutions have demonstrated successful transitions and operations across a wide array of industries and enterprise sizes within Germany. The risks associated with non-SD-WAN networks and the benefits and challenges of implementing full SD-WAN solutions have been extensively studied and documented through numerous case studies in Germany and globally. They are, therefore, well understood by German executives.

The German market has experienced a significant increase in integrating highly sophisticated security solutions into enterprise networks. These solutions often combine SD-WAN with advanced security features, including SSE. While these offerings share similarities with SASE solutions, they do not encompass the full spectrum of security capabilities that a complete SASE deployment, which by definition incorporates SD-WAN, would offer.

From the 151 companies assessed for this study, 27 qualified for this quadrant, with 10 being Leaders and one a Rising Star.

accenture

Accenture Infrastructure Engineering, including the Cloud First Networks and 5G practice, brings together over 12,000 experts globally to serve three key client segments with AI-driven solutions. Its network and security labs include services focused on Germany.

colt

Colt delivers a managed unified network fabric and services, including SD-WAN, network connectivity, installation and maintenance, proactive monitoring, high-level security measures and SSE/SASE capabilities.



Deutsche Telekom leverages its multivendor portfolio to consult with clients, recommend best-fit managed SD-WAN solutions tailored to clients' business needs and monitor service levels.

GTT

GTT provides multiple SD-WAN gateways within its network, optimizing cloud-based and private WAN traffic and incorporating integrated security features from in-house and partner offerings. Clients benefit from the support of a Tier 1 advanced backbone.



Logicalis offers the Logicalis Digital Fabric Platform with Intelligent Connectivity, delivering next-generation connectivity solutions, including private 5G, SD-WAN, SASE/SSE and data center services.



Orange Business leads with its flagship product, Evolution Platform, offering managed, comanaged and custom solutions with advanced platform and operational models, supporting clients from initial consultation through full implementation.

R||RIEDEL

Riedel Networks builds its expanding managed SD-WAN network on Cisco technologies, providing clients with the latest Cisco solutions while enhancing user experience and ensuring customers benefit from an optimized and seamless experience.



Managed SD-WAN Services



Verizon Business adopts a customer value-focused approach through its strategic partnerships with HCLTech and others, showcasing its comprehensive network-as-a-service (NaaS) solutions that offer flexible and managed networking options.

Vodafone

Vodafone serves large enterprises, SMEs and small office/home office (SOHO) customers. Its managed SD-WAN and SASE capabilities continue expanding through strategic partnerships while delivering broad and industry-specific solutions.



Wipro integrates its managed SD-WAN services in Germany as part of its global Digital Network Services portfolio that includes solutions such as Wipro Insightix™, NetFactory, CoDNI, NetBox, MDO and #WANFreedom.

HCLTech

HCLTech (Rising Star) transforms an enterprise's networks with its managed SD-WAN services, offering a flexible and as-a-service-based model that focuses on simplicity, agility and efficiency in operation.



GTT



"GTT Communications (GTT) stands out as a provider of high-performance, secure and flexible SD-WAN solutions, leveraging its Tier 1 backbone and multivendor approach to customized enterprise solutions."

Dr. Kenn D Walters

Overview

GTT Communications (GTT) has an established presence in Germany, offering flexible technology solutions that cater to diverse business requirements. The company provides managed SD-WAN technology-agnostic solutions sourced from top industry providers. These solutions feature proactive monitoring and management through the Envision platform, enabling enterprises to select deployment models that best align with their needs while maintaining cost-effective scalability. Supported by its owned and operated global Tier 1 backbone, GTT ensures low-latency, high-performance connectivity for seamless data transmission.

Strengths

Overarching solution strategy: GTT emphasizes its commitment to delivering tailored and client-focused SD-WAN solutions through its strategic message — ONE PARTNER. ONE PLATFORM. ONE EXPERIENCE. This approach integrates advanced security features from its offerings and third-party providers, enhancing network oversight and providing real-time insights into performance, security and traffic management.

Comprehensive platform solutions: In line with the company's global portfolio, the GTT Envision platform enables businesses to seamlessly connect, orchestrate, virtualize and automate networks. GTT offers managed and comanaged options via this platform, built on its Tier 1 global network, providing

customers with comprehensive visibility, insights, orchestration and control over their network operations.

Multivendor SD-WAN and security portfolio:

GTT's SD-WAN portfolio includes solutions from VMware by Broadcom, HPE Aruba and Fortinet, offering businesses a range of secure and flexible connectivity options. Its managed security services complement SD-WAN deployments, ensuring comprehensive and end-to-end network protection. GTT can deliver either a single-vendor SASE solution via Fortinet and dual-vendor solutions integrating VMware, Aruba and Fortinet for SD-WAN plus either Fortinet or Palo Alto for SSE.

Caution

GTT's focus on multinational corporations and large enterprises positions it as a strong player in the market. However, with the midsize enterprise segment experiencing rapid growth in Germany, the company could expand its market penetration and new revenue streams within this segment.





SD-Networks Transformation Services (Consulting and Implementation)

Who Should Read This Section

This report is valuable for service providers offering SD-networks transformation services in Germany to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of providers offering advisory, consulting and other related services, such as planning for enterprises implementing SD-networking.

Networking professionals

Should read this report to understand how to effectively consume SD-network transformation services and leverage providers' partner ecosystem.

Digital transformation professionals

Should read this report to understand how SD-network transformation service providers align with their enterprise transformation journey and compare with one another.

Cybersecurity professionals

Should read this report to gain insights into the current security capabilities of SD-networks service providers' delivery.

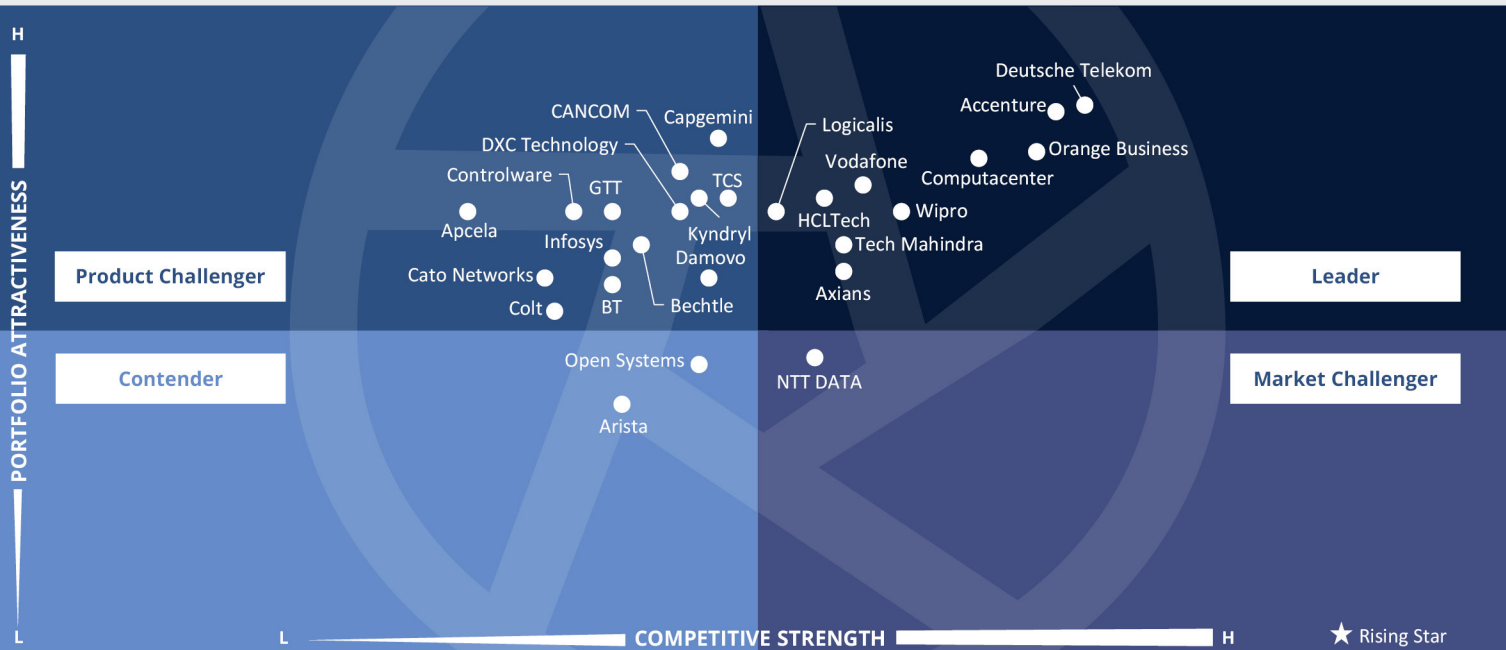
Procurement professionals

Should read this report to learn about the payment schemes offered by transformation service providers, especially the pay-as-you-consume model or similar payment arrangements.



Network – Software-Defined Solutions and Services SD-Networks Transformation Services (Consulting and Implementation)

Germany 2025



This quadrant evaluates companies that offer **advisory, consulting and implementation services** in SD-networking. These providers deliver **comprehensive solutions**, covering all stages, from **initial consulting to full implementation and support**.

Dr. Kenn D Walters



SD-Networks Transformation Services (Consulting and Implementation)

Definition

This quadrant analyzes providers of **advisory, consulting and other related services**, such as planning for enterprises implementing SD-networking. These services begin with an initial transformational road map and continue through consulting and planning to service delivery, rollout and testing.

Modern businesses demand greater agility, flexibility, automation and security across various domains, including private, public, hybrid and multicloud networking, IoT, Industry 4.0, IaaS and AI - and ML-driven, intent-based networking solutions. These needs require adaptable network environments. Change also introduces **challenges in managing both legacy and ever-evolving modern technology** and operations, particularly due to a **shortage of skilled subject matter experts**, programmers and network operations (NetOps) professionals in many enterprises, together with the drive for sustainability in SD-networking globally.

Many organizations seek **independent advice** from professional service consultants or network service providers.

Eligibility Criteria

1. **Overall scope** of product and service portfolio
2. **Ability** to provide consultation, from the strategizing phase to technology deployment, and integration and implementation support
3. **Understanding of the overall market** and contributions to the same
4. **Scope of partnerships** and offerings and management capability for the needed orchestration within a customer project
5. **Reference customers** or solutions in commercial deployment
6. **Competitiveness** of offerings and types of commercial terms



SD-Networks Transformation Services (Consulting and Implementation)

Observations

The intricate nature of SD-networking in Germany has led to widespread reliance on advisory engagements, necessitating expertise tailored to enterprise- and industry-specific challenges. Moreover, it is crucial to have strategic technology planning that adapts to the dynamic business goals of organizations and provides actionable metrics. Typically, these engagements include skilled advisory groups with vast industry knowledge that excel in presales, strategic planning and, frequently, implementation assistance.

Organizations have increasingly sought the services of traditional independent consultancy firms and systems integrators (SIs) to address their strategic and tactical planning requirements. These establishments utilize advisory experts who offer impartial advice and compete to deliver plans finely tuned to each enterprise's objectives.

To compete with disruptive entrants and SIs, leading network service providers in Germany have incorporated consulting and advisory groups into their operations. These providers

strive to offer solutions that are not tied to any specific vendor and provide services as specialized as those offered by consultancy firms and SIs, bolstered by partner ecosystems to meet an array of client requirements.

All providers now utilize advanced methodologies, certifications and well-organized implementation strategies to ensure smooth transitions from strategic planning to actual deployment. These strategies focus on reducing risks and ensuring solutions align with business objectives.

From the 151 companies assessed for this study, 27 qualified for this quadrant, with 10 being Leaders.



Accenture's advisory approach facilitates client transformation, aligning the business road map with their strategic needs. It maximizes organizational potential and emphasizes integrating business, technology, processes and human elements.



Axians provides customized and vendor-neutral solutions tailored to client requirements. With a diverse portfolio of vendors, the company selects the most suitable solution for each client, offering individualized services without fixed or restricted packages.



Computacenter brings extensive expertise in designing and implementing optimal ICT transitions and SD-WAN multicloud architectures. It utilizes experienced in-house resources to deliver comprehensive advisory, design and implementation services.



Deutsche Telekom provides various advisory and delivery services across multiple industries. It delivers high-quality client-centric advisory solutions and proprietary innovations while maintaining a strong network of strategic partners.



HCLTech enhances SD-WAN transitions with a dedicated consultancy practice that continuously monitors performance to ensure optimized network transformation. The company assists enterprises in achieving simplified, agile and efficient network environments.



Logicalis delivers experienced advisory and road mapping services as the starting point for its Logicalis Digital Fabric Platform with Intelligent Connectivity. Its extensive range of solutions are designed to meet or exceed client requirements.



Orange Business provides continuous and on-demand end-to-end consulting for SD-WAN/SASE transformation projects. It collaborates with Orange Group, Orange Cyberdefense and the Evolution Platform to support customer requirements effectively.



SD-Networks Transformation Services (Consulting and Implementation)



Tech Mahindra leverages its industry expertise, tools and processes to offer advanced network-as-a-service models. Its advisory services integrate managed services, engineering support and cutting-edge automation.

Vodafone

Vodafone leads network transformation initiatives in Germany and the SME market, delivering tailored solutions through expert advisors and leading-edge information portals. It ensures seamless solution integration to address specific client needs.



Wipro specializes in consulting and transformation services for SD-networks, employing its Insightix™ assessment framework, NetFactory and CoDNI across multiple industries. The company also offers advanced transformation services for SD-WAN, SSE and SASE.





Edge Technologies and Services (Including Private 5G)

Who Should Read This Section

This report is valuable for service providers offering edge technologies and services (including private 5G) services in Germany to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of providers offering hardware, software, management or reporting tools, applications and services associated with edge network technology.

Networking professionals

Involved in strategy, architecture, operations and procurement should read this report to understand providers' relative positioning and capabilities.

Digital transformation and operations professionals

Should read this report to understand how mobile network transformation service providers align with their transformation journey and monitor ongoing network performance.

Cybersecurity professionals

Should read this report to understand providers' security capabilities in mobile network service delivery, offering enhanced visibility into the providers' security approach.

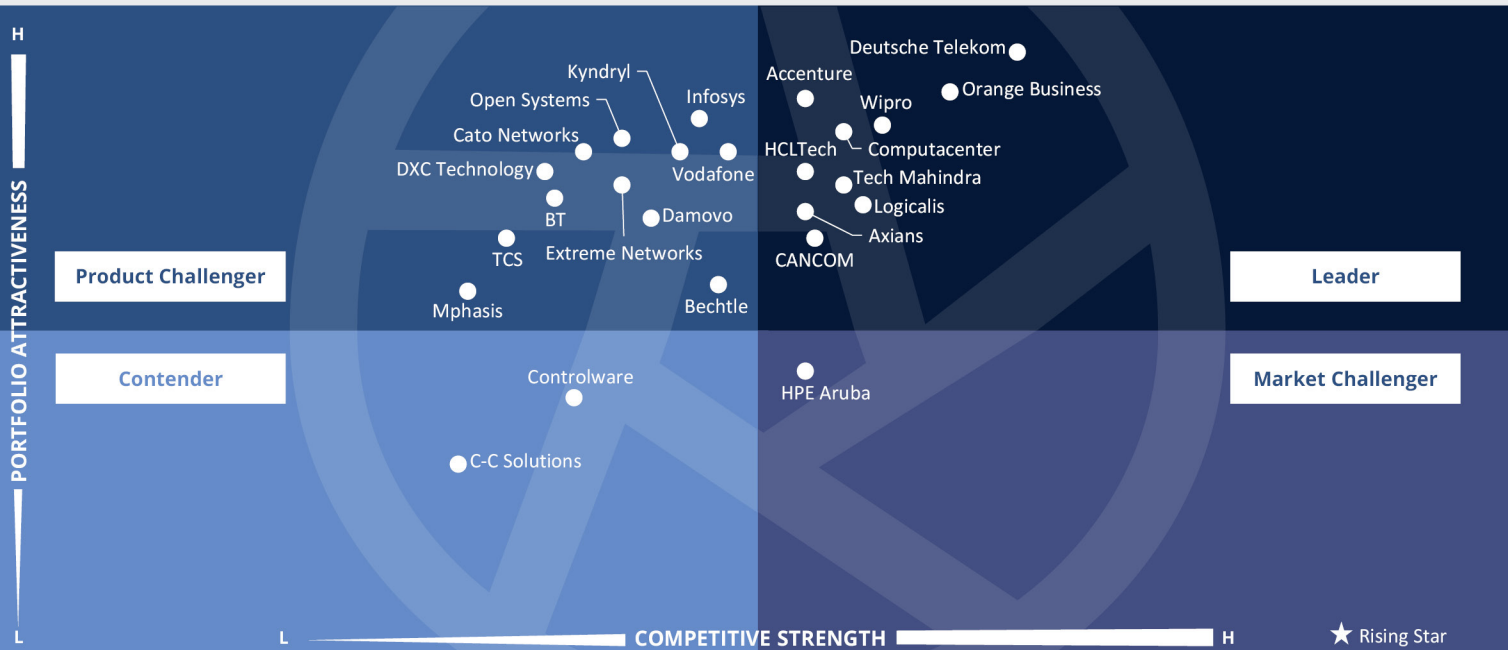
Data analytics professionals

Should read this report to identify high-level data from edge devices that can be analyzed to gain actionable insights to improve efficiency, performance or decision-making.



Network – Software-Defined Solutions and Services Edge Technologies and Services (Including Private 5G)

Germany 2025



This quadrant examines providers offering various **network edge solutions**, including **SD-LAN**, **private 5G managed through SD-networking** and **innovative edge-oriented solutions** and services, tailored for corporate networks.

Dr. Kenn D Walters



Edge Technologies and Services (Including Private 5G)

Definition

This quadrant analyzes providers and vendors offering technologies that span hardware, software, management tools, applications and services related to edge network technology, including private 5G solutions, for enterprise customers.

Edge computing, services and technologies include IoT and IIoT, with connectivity enabled through overlay or private 5G networks for enhanced speed and flexibility.

Enabling localized data processing can accelerate response times and enhance security, as any breaches are contained within the local network rather than being transmitted to the WAN or cloud. In IoT edge computing and networking, data from various connected devices is typically gathered on local devices, analyzed at the edge and then sent to a central data center or cloud for further processing. As the number of connected devices and AI usage grow exponentially, the volume of data generated increases significantly, underscoring the need for efficient, software-driven edge networks.

Eligibility Criteria

1. **Product portfolio coverage**, focus areas and completeness of modular or area solutions
2. **Ability** to integrate into broader managed or orchestrated solutions
3. **Understanding of the overall market**, technology environment and contributions to the same, **along with industry-specific knowledge and experience with deployed references**
4. **Scope of partnerships and offerings** and management capability of disparate providers and solutions within a customer project
5. **Reference customers** or solutions in commercial deployments
6. Competitiveness of offerings and **types of commercial terms**



Edge Technologies and Services (Including Private 5G)

Observations

The enterprise network edge is a crucial junction where networks meet external systems. It is vital in providing organizations with uninterrupted connectivity, streamlined data transmission and secure system access. Developments in edge technology have created solutions that bolster security, enhance system performance and facilitate effective access to local and cloud services. This technology area has seen rapid advancement, fueled by breakthroughs in edge computing and solutions for networks, branches and remote regions.

The expansion in this sector is significantly influenced by IoT, including general IoT and IIoT and improvements in software-defined networking technologies such as SD-LAN, SD-WLAN and private 5G networks. These innovations help navigate the complexities of contemporary IT setups, empowering businesses to achieve enhanced operational proficiency.

Incorporating network edge technologies increases the network's performance and reliability. Organizations can reduce delay, boost application efficiency and facilitate real-time data analysis by utilizing edge computing, SD-networking, management tools and network function virtualization (NFV) within data centers.

Consequently, edge technology has become a strategic priority, aligning with German and global trends such as Industry 4.0 innovations, real-time data analytics, robotics, telematics with telemetry, energy usage assessments and environmental sustainability goals. Its broad adoption illustrates its crucial role in fostering innovation and maintaining a competitive edge in an increasingly interconnected world.

From the 151 companies assessed for this study, 25 qualified for this quadrant, with 10 being Leaders.



Accenture, through its Converged Edge Networking practice and Cloud Network Operator unit, offers advanced solutions in private 5G deployment and branch automation. These efforts focus on delivering next-generation capabilities with streamlined operational execution.



Axians brings mature systems integration and advisory expertise to its network-as-a-service (NaaS) offerings, delivering tailored edge solutions through close collaboration with clients to meet industry- and customer-specific needs.



CANCOM integrates edge solutions into its managed services portfolio, especially its everything-as-a-service (XaaS) model. Its digital workplace services encompass LAN/WLAN, camera and sensor-based edge technologies.



Computacenter delivers customized and industry-specific edge computing strategies, including IIoT platform development and migration of shop-floor applications. Cost monitoring and blueprinting are included, with solution testing available in its dedicated German labs.



Deutsche Telekom provides a full suite of edge and core network services, including its advanced EdgAIR platform and 5G campus solutions. Its offerings span the entire edge platform lifecycle.



HCLTech delivers integrated edge solutions with a strong emphasis on 5G and wireless network capabilities. Key services include private 5G integration and pervasive wireless mobility as a service, supporting broad network transformation initiatives.



Edge Technologies and Services (Including Private 5G)



Logicalis supports enterprise network transformation across Germany, with over 400 professionals in major cities such as Frankfurt, Berlin, Cologne, Munich and Stuttgart. The company specializes in SDN, NFV, SD-WAN, SASE, private 5G and edge implementations.



Orange Business enhances its edge solution capabilities by integrating networking, cloud, security, LAN, IoT and IIoT expertise into its Evolution Platform that supports scalable and secure edge deployment strategies.



Tech Mahindra provides AI-driven edge technologies for mobile, branch and enterprise 5G environments. Its solutions include advisory services and toolsets for delivering edge and network solutions in a vendor-neutral as-a-service model.



Wipro offers a comprehensive edge computing framework through its BoundaryLess Universal Edge (BLUE) platform. This approach includes end-to-end orchestration, from the enterprise core through multicloud environments to the network edge, enabled by its proprietary MDO.





Secure Access Service Edge (SASE)

Secure Access Service Edge (SASE)

Who Should Read This Section

This report is valuable for service providers offering SASE services in Germany to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of providers offering integrated network and security solutions for enterprises, spanning from the core to the edge.

Networking professionals

Should read this report to learn about SASE service providers' expertise, technical and integration capabilities and partnerships.

Digital transformation professionals

Should read this report to understand how SASE service providers align with their enterprise digital transformation journey and how they compare with one another.

Cybersecurity professionals

Should read this report to gain insights into the current security capabilities of SASE service providers' delivery.

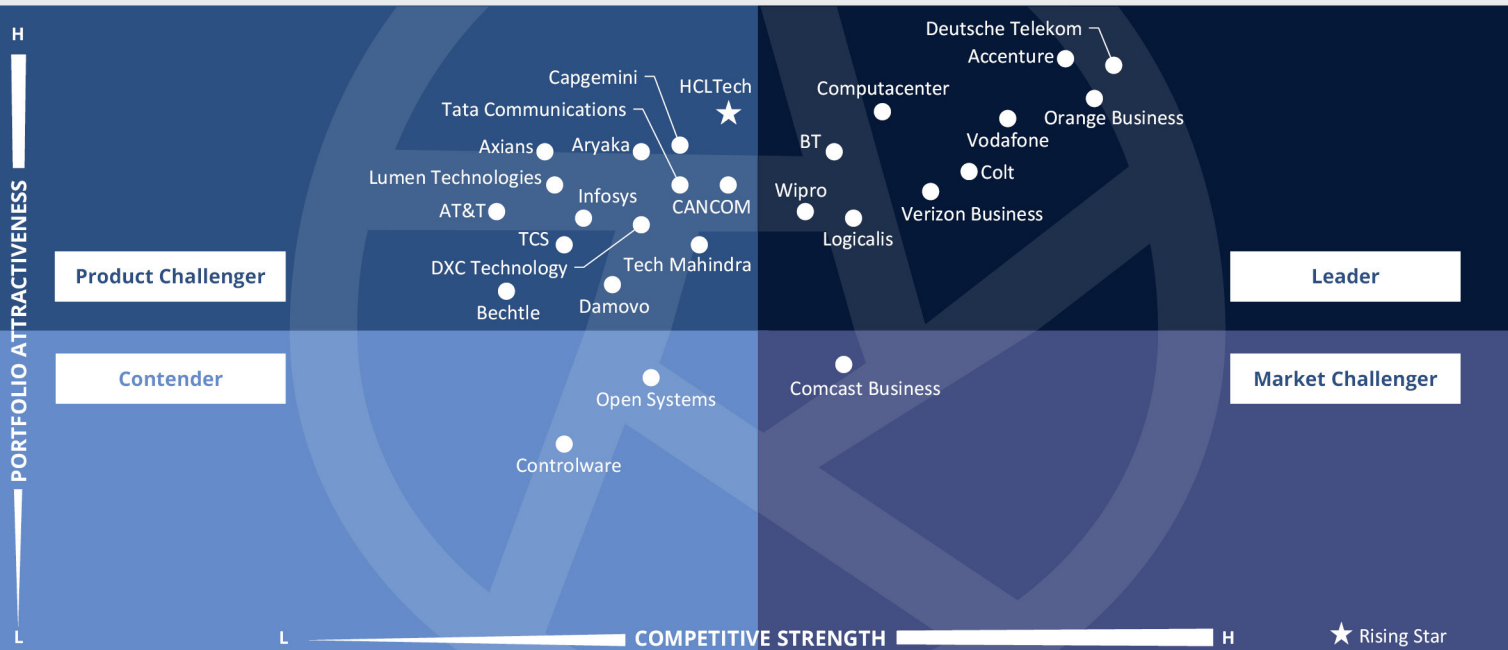
Change management specialists

Should read this report to learn how SASE service providers align with their organizational change initiatives and assess their relative performance against industry standards.



Network – Software-Defined Solutions and Services Secure Access Service Edge (SASE)

Germany 2025



This quadrant explores how **SASE providers** combine solutions for merging SD-networking with enhanced security, delivering **holistic and complete solutions** extending from **central infrastructure** to the **edges of the network** and locations.

Dr. Kenn D Walters



Secure Access Service Edge (SASE)

Definition

This quadrant analyzes SASE solution providers that offer enterprises integrated network and security solutions, spanning from the core to cloud to the edge.

Network-integrated security has evolved significantly, incorporating proactive detection and response systems, zero-trust networking and identity-based security and authentication. When added to an existing network, this approach is often referred to as Secure Service Edge (SSE). Many vendors now combine identity-based authentication, SASE and network security to deliver a comprehensive, secure-by-design framework as advanced networks for business.

Key components of SASE include SD-WAN, cloud access security broker (CASB), next-generation firewalls (NGFWs), firewall as a service (FWaaS), zero trust network access (ZTNA) and secure web gateways (SWGs).

Providers in this space are increasingly offering full implementation solutions to enterprises in single and multivendor modes using their extensive partner ecosystems.

Eligibility Criteria

1. Product **portfolio coverage**, focus areas, **completeness of solutions** and fully integrated broader solutions linking to data centers or other enterprise IT applications and systems
2. Membership or affiliation (including inputs) with **global SASE technical and trade groups**
3. Ability to enable clients to **reuse their existing network** and ICT solutions, if required, and not merely rip and replace
4. Ability to deliver **training** and provide **testing** for clients
5. **Industry-specific knowledge** and experience mapped to the client type
6. **Scope of partnerships and offerings** and management capability for the needed orchestration within a customer project
7. **Reference customers or solutions** in commercial deployment
8. **Competitiveness of offerings** and types of commercial terms



Secure Access Service Edge (SASE)

Observations

The development of secure enterprise networks has evolved from isolated solutions to fully integrated systems known as SASE. This modern approach has established a consensus on its key elements, as outlined in the quadrant definition, allowing SASE to progress from experimental phases to broad commercial use. Major vendors now provide comprehensive SASE solutions, cementing their role as foundational to transforming secure enterprise networks.

In Germany, the SASE market is rapidly expanding in enterprise transformation and networking. This growth trend is anticipated to continue, driven by emerging SASE innovators and established systems integrators collaborating with leading providers. These partnerships offer fully secure networking solutions tailored to business requirements, making SASE an essential component of current enterprise tactics.

A concept closely linked to SASE is SSE, which is also frequently offered together. SSE includes cloud-based security measures such as cloud access security broker (CASB), secure web gateway (SWG), firewall as a service (FWaaS) and zero trust network access (ZTNA). However, it lacks a unified SD-WAN component. These SSE elements comprise a significant part of a complete SASE structure.

SSE is attractive to early adopters of SD-networking in Germany as it aligns well and can be integrated with existing SD-WAN setups. This alignment provides organizations with a solution that, while marginally less comprehensive, closely resembles SASE, effectively bridging the gap between traditional SD-networking and fully realized SASE capabilities.

From the 151 companies assessed for this study, 27 qualified for this quadrant, with 10 being Leaders and one Rising Star.



Accenture offers a broad spectrum of SASE and SSE services, encompassing strategic planning, road map development, migration support, solution deployment, ongoing management and network segmentation.

BT

BT delivers a flexible SASE framework supported by a unified service layer, enhancing automation and simplification via the Unified Service Desk and accommodating single and multivendor SASE deployments.



Colt provides an all-encompassing managed network services suite, covering SD-WAN, connectivity, CPE setup and support, proactive system monitoring, advanced security, and SSE and SASE capabilities.



Computacenter delivers high-level SASE consultancy, supporting business case creation, vendor analysis and selection, solution sourcing, architecture design and professional vendor-neutral implementation services.



Deutsche Telekom follows a vendor-agnostic, consultative strategy for SASE, offering modular solutions designed for seamless integration within its SD-X platform to enhance manageability and performance.



Logicalis offers the Cisco Powered Intelligent Connectivity solution, a SASE-based managed service delivering secure, edge-to-edge access and zero trust security with real-time insights into performance.



Secure Access Service Edge (SASE)



Orange Business integrates SASE technology into its Evolution Platform, focusing on improved network performance and security with automation-driven real-time updates and enhanced UX.



Verizon Business provides an advanced SASE platform that enables secure and scalable connectivity across locations, supported by network-on-demand features with assured bandwidth and service quality.

Vodafone

Vodafone delivers a robust and integrated SD-WAN and SASE solution, with expansion plans targeting SMEs and SOHO markets, leveraging multivendor partnerships to enhance SASE capabilities.



Wipro maintains a strong footprint in Germany, with dedicated regional teams offering SASE services through its Digital Network Services arm, built on SASE and ZTNA security frameworks.

HCLTech

HCLTech (Rising Star) introduces a cloud-native SASE security platform closely integrated with the Fusion Platform and aimed at enhancing user engagement, operational efficiency and cost-effectiveness.





Appendix

The ISG Provider Lens 2025 – Network – Software-Defined Solutions and Services research study analyzes the relevant software vendors/service providers in the Germany market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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The research and analysis presented in this study will include data from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. ISG recognizes the time lapse and possible market developments between research and publishing, in terms of mergers and acquisitions, and acknowledges that those changes will not reflect in the reports for this study.

All revenue references are in U.S. dollars (\$US) unless noted.

The study was divided into the following steps:

1. Definition of Network – Software-Defined Solutions and Services market
2. Use of questionnaire-based surveys of service providers/ vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities & use cases
4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)
5. Use of Star of Excellence CX-Data
6. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
7. Use of the following key evaluation criteria:
 - * Strategy & vision
 - * Tech Innovation
 - * Brand awareness and presence in the market
 - * Sales and partner landscape
 - * Breadth and depth of portfolio of services offered
 - * CX and Recommendation



Author & Editor Biographies

Lead Author



Dr. Kenn Walters
Global Principal Lead Analyst

Dr. Kenn Walters is a highly skilled senior executive with over 40 years of experience in directing major transformational technology projects, research and development programs, as well as extensive experience within providers and in global industry research and executive advisory. For ISG, Kenn has written over 100 articles for ISG Insights in areas such as digital transformation, cloud networks, SD-networking, MNS, SASE and digital disruptors.

He is a Distinguished lead analyst and author for multiple regions in the Provider Lens™ reports, (<https://isg-one.com/research/isg-provider-lens>) in such areas as Software Defined Networking, Managed Network Services and Contact Center CX. He holds a BSc, MSc, and Ph.D. in computer science and communications systems. He is a judge of the prestigious Global World Communications Awards and a FELLOW of the BCS.

Research Analyst



Shatakshi Singh
Research Analyst

Shatakshi Singh is a Research Analyst at ISG and is responsible for supporting Provider Lens™ studies on Telecommunication, Media and Entertainment Services, Networking – Software defined Solutions and Services and Managed Network Services. She works closely with the Lead author from diverse regions in the research process.

She also authors global summary reports. Prior to this role, she has completed her masters i.e. MBA from Amity Business School, Amity University Noida.



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Study Sponsor



Heiko Henkes
Managing Director

Heiko Henkes serves as a Managing Director at ISG, overseeing the Global ISG Provider Lens™ (IPL) Program for all IT Outsourcing (ITO) studies alongside his pivotal role in the global IPL division as a strategic program manager and thought leader for IPL lead analysts. His expertise lies in guiding companies through IT-based business model transformations, leveraging his deep understanding of continuous transformation, IT competencies, sustainable business strategies and change management in a cloud-AI-driven business landscape.

Henkes is known for his contributions as a keynote speaker on digital innovation, sharing insights on using technology for business growth and transformation.

IPL Product Owner



Jan Erik Aase
Partner and Global Head – ISG Provider Lens™

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor.

Now as a partner and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.



iSG Provider Lens™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens™ research, please visit this [webpage](#).

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iSG

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The firm, founded in 2006, is known for its proprietary market data, in-depth knowledge of provider ecosystems, and the expertise of its 1,600 professionals worldwide working together to help clients maximize the value of their technology investments.

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JUNE, 2025

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