

Network – Software-Defined Solutions and Services

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

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In many industries, SD-networks have become synonymous with secure cloud-enabled flexible enterprise networks

Business trends

Forecasts for the UK's GDP in 2025 have been revised downward, with the Bank of England projecting growth at 0.75 percent. As of March 2025, inflation stood at 2.6 percent, a decrease from 2.8 percent in February. The Bank of England anticipates that slower economic growth could help bring inflation closer to its 2 percent target.

Rising operational costs and tax burdens have led to increased business insolvencies, particularly affecting sectors exposed to international trade and tariffs. The UK economy is facing significant headwinds primarily due to the impact of US tariffs and global trade uncertainties. These factors are affecting economic growth, the job market and the financial sector. In response, the Bank of

England is actively managing the situation by adjusting monetary policies and monitoring financial stability risks.

In 2024, the UK exported £59.3 billion worth of goods to the US and imported £57.1 billion, reflecting a broadly balanced trade relationship. However, new US tariffs, including a 25 percent levy on foreign-made vehicles and metals, pose significant risks to key sectors in the UK such as the automotive and steel industries.

In April 2025, UK macroeconomic news reflected a challenging environment shaped by domestic policy shifts and external pressures, notably US tariffs imposed under President Trump's administration. Prime Minister Starmer has introduced emergency economic measures, including quango cuts, agency mergers and relaxed EV mandates, to mitigate the impacts of these tariffs, which pose a threat to industries such as automotive, potentially risking 25,000 jobs. The tariffs, with a proposed baseline rate of 10 percent, have prompted the UK to negotiate for lower rates, while businesses face surging insolvencies due to rising costs and taxes.

All enterprise
network
functionalities
and security
requirements depend
on SD-networks.



Executive Summary

In this challenging climate, the M&A activities in the UK for year-to-date 2025 demonstrate a dynamic market, with companies actively pursuing strategic opportunities to grow, consolidate or restructure. Despite regulatory scrutiny, deal-making continued across various sectors, driven by factors such as strategic alignment, market expansion and portfolio optimisation. Following are the key themes:

- **Strategic realignment:** Companies are actively reshaping their portfolios through acquisitions and divestitures to focus on core competencies, improve efficiency and respond to changing market conditions. This approach involves both consolidation (acquiring competitors or complementary businesses) and divestment (selling off non-core assets).
- **Market expansion:** Many deals are driven by the desire to expand market share, enter new geographies or enhance technological capabilities. This trend reflects a competitive environment where companies seek growth and scale.

- **Financial manoeuvring:** The financial sector is particularly active, with various transactions aimed at consolidation, capital raising and financial structure optimisation. These activities include mergers, acquisitions, capital increases and divestitures of financial assets.

On the venture capital (VC) side, investments in Europe held steady at \$18 billion across 1,883 deals, with the UK remaining a major hub for innovation and capital deployment. There was a concentration of VC investment in early-stage companies, reflecting a preference for backing new technologies and business models. The UK saw a healthy start to the year for first-time financings, signaling continued appetite for supporting emerging startups. Isomorphic Labs, a UK-based AI drug discovery firm, raised \$600 million, exemplifying the country's leadership in life sciences and AI integration. Synthesia, a UK-based AI-powered video communications company, raised \$180 million, highlighting innovation in GenAI and media technologies. The UK continues to be a leader in fintech and proptech innovation, as evidenced by sustained interest in these sectors and the anticipation

around Klarna's postponed IPO. Key areas of investment, including AI, defence technology and alternative energy, are expected to remain in focus, with the UK well positioned to capitalise on these trends.

IT Trends

- On the IT side, ransomware, phishing and third-party risks continue to surge. UK firms are prioritising zero trust security, cloud-native threat detection and incident response, while SMBs focus on endpoint protection and managed security services.
- The emphasis on IT support and skills management is growing, ranging from enterprise-level IT transformation initiatives to SMBs engaging managed service providers (MSPs). There is a strong focus on upskilling internal teams and outsourcing specialised technical support, ensuring that organisations can maintain scalable and secure digital operations.
- GenAI is moving from experimentation to deployment, advancing internal knowledge bots, content creation and customer service. Automation is expanding across operations, finance and HR to reduce costs and increase operational speed. Enterprises are increasingly investing in platforms that facilitate data-driven decision-making and minimise manual workloads, propelling operational efficiency.
- Cloud optimisation is an underlying theme of embracing hybrid/multicloud setups, enhancing performance, cost efficiency and compliance. A cloud-first approach has become a standard practice, with many organisations adopting hybrid models that balance performance, security and cost-efficiency. SMBs progressively integrate SaaS and cloud-native tools, while larger enterprises focus on infrastructure as a service (IaaS), platform as a service (PaaS) and multicloud orchestration strategies.



Executive Summary

- o Companies frequently seek objective advice from traditional management or technology consulting firms prior to issuing official requests for information (RFIs) or calls for bids for a procurement. There is also a growing trend of involving product-agnostic traditional consulting companies or system integrators (SIs) at the strategic and tactical planning stage.
- o The adoption of AIOps is increasing for predictive maintenance, automated issue resolution and smarter monitoring, thereby enabling enterprises to manage increasing IT complexity. SMBs are tapping into MSPs that provide AI-enabled IT support as a service. Network automation and remote management capabilities are critical for scaling operations and ensuring security across dispersed workforces.

Whether its implementing AI-driven fraud detection and expanding digital banking services to improve CX and security at HSBC; adopting AI for demand forecasting and enhancing online grocery platforms at Tesco and Unilever; implementing AI and ML to

personalise financial products and streamline underwriting processes at Legal & General Group; leveraging IoT and digital twins to enhance operational efficiency and optimise production at Rio Tinto, Shell and BP; or using AI and data analytics to accelerate drug discovery, optimise clinical trials and enhance patient experiences at AstraZeneca and GSK, UK businesses are transforming rapidly.

Network transformation trends

On the network side, investments in SD-WAN, SASE and 5G are enabling secure, scalable and flexible connectivity. IT teams are revamping collaboration stacks and digital workplaces to support distributed workforces and real-time access to data.

Energy and resources companies use SD-WAN, edge computing and AI at the edge for real-time operations and predictive maintenance. Zero trust security and network automation help reduce costs and enhance resilience. Banking clients leverage SASE, hybrid cloud and NFV for secure, flexible and cost-efficient networks. AI-driven threat detection and agile architectures enable faster digital service rollout. Building

secure hybrid networks for pharmaceutical and healthcare majors is crucial to support global R&D and clinical trials. Using private 5G, SD-WAN and AI-based routing to boost speed, compliance and collaboration, thus, becomes imperative. Consumer goods and retail companies deploy cloud-first networks, IoT and AI-ready infrastructure for smart operations. SASE and SD-WAN enhance security and flexibility across distributed sites.

Business priorities

- o In an environment marked by economic uncertainties and rising operational costs, businesses of all sizes are increasingly prioritising cost control, lean operations and resilient supply chains. Key strategies include initiatives focused on energy efficiency, optimised cloud resource management and flexible workforce planning.
- o Enhancing customer relationships is paramount. Organisations are focusing on personalisation, upgrading CRM systems and fostering omnichannel engagement. Whether leveraging

AI-driven insights or refining loyalty programs, businesses aim to deepen customer connections and ensure revenue stability.

- o With hybrid work models becoming the norm, companies are reevaluating collaboration methods, performance management and employee well-being. The adoption of flexible work arrangements and digital productivity tools has become widespread across both large enterprises and SMBs.
- o In response to declining traditional demand, businesses are increasingly exploring new revenue streams. These include digital services, subscription-based models and embedded finance solutions — a trend that is becoming more pronounced, even among midsize enterprises.



- o There is a heightened emphasis on ESG compliance, impacting business priorities significantly. This trend encompasses adherence to data privacy regulations like GDPR and proactive sustainability reporting, which are now being recognised and addressed more diligently, even by smaller firms.

Business aligned Drivers for network transformation

- o **Evolving to a business-responsive and flexible network:** UK enterprises are increasingly focused on enhancing network flexibility and simplifying operational management. Solutions like SD-WAN as a service (aaS), enable real-time monitoring through a centralised, cloud-based control plane. This approach reduces reliance on physical hardware upgrades and operational complexity, becoming a fundamental component of modern IT strategies. The integration of hybrid security solutions into enterprise networks has significantly increased in the UK market. Enterprises anticipate

that vendors and providers will enhance their security solutions.

- o **Reducing risks in cloud migrations:** As UK businesses migrate ICT and networking operations to the cloud, safeguarding against complexity and risk is crucial. SD-networking (SDN) facilitates secure transitions to single or multicloud environments, providing visibility simplicity and control, essential for maintaining operational integrity. This infrastructure supports the secure flow of data and applications across diverse cloud platforms.
- o **Strengthening network security:** There is a clear need for integrated security solutions that protect the entire network, from on-premises to cloud. SDN establishes a robust security foundation with measures such as encryption, access controls and threat intelligence. SD-WAN is ideal for SASE solutions, integrating with cloud-based security services to secure data transmissions. It can also be enhanced with security service edge (SSE) capabilities, ensuring

comprehensive security without compromising performance.

- o **Accelerating adoption among SMEs:** The adoption of SDN is rapidly increasing among UK SMEs seeking affordable, cloud-based solutions. SD-WAN's scalability and consumption-based pricing model allow SMEs to enhance security and performance while minimising operational costs. Major suppliers and SIs offer tailored solutions at global and local levels.
- o **Supporting innovation with advanced technologies:** The UK's digital transformation, along with advancements like AI and automation, is driving demand for flexible network architectures. SDN supports these technologies through enhanced visibility and real-time management. By leveraging managed services, UK enterprises can reduce the complexity and costs related to software maintenance. This foundation accommodates innovations in edge computing, self-healing networks and 5G connectivity, ensuring organisations

remain competitive in a rapidly evolving digital landscape. To enhance WAN security posture, optimise traffic, assist remote workers and boost resilience, UK businesses are also outsourcing their network and security requirements to external service providers.

In summary, the evolution of SDN in the UK is driven by technological advancements, shifting business needs and ongoing digital transformation. SD-WAN, along with SASE, SSE and SD-LAN, helps UK enterprises navigate modern networking complexities. As businesses adopt cloud environments, SDN offers essential flexibility, security and scalability to thrive in a digital-first landscape.

Outsourcing and new age IT trends

This backdrop significantly impacts the outsourcing, professional and managed services activity within SDN markets. IT services and outsourcing may see heightened demand as UK firms, battered by tariffs and costs, seek cost efficiencies through offshoring or managed services, although economic uncertainties could delay investments.



The professional and managed services market could benefit from businesses needing expert guidance to navigate trade disruptions and regulatory shifts such as the Supreme Court's car finance ruling. The SDN market, reliant on infrastructure investment, might face headwinds as public spending cuts and tariff-related economic slowdowns reduce capital for network upgrades, although firms may prioritise SDN for cost-effective, flexible solutions amid constrained budgets. Prime Minister Starmer's pledge to support businesses could spur targeted IT support, yet the overall outlook hinges on tariff negotiations and domestic fiscal stability.

AI, quantum and cyber impacts on the IT industry

- **AI as shadow IT:** Teams are independently adopting network-centric AI tools without formal approval, leading to governance challenges. Enterprises are responding with lightweight registries and flexible policy frameworks to manage this decentralised usage.
- **AI-driven organisational reshaping:** AI is altering organisational structures by redefining roles, decision-making processes and accountability, impacting leadership, HR, IT, network and governance.
- **AI's impact on network software development:** The rise of AI coding assistants has increased code generation but also code churn, emphasising the need for human oversight to maintain code quality for networking software systems.
- **Sophistication and proliferation of AI-powered network threats:** The emergence of AI-driven malware can mutate and evade detection mechanisms. Phishing and social engineering attacks have become more convincing, leveraging techniques such as deepfakes, and the attack processes are automated. Cyberattacks are becoming more sophisticated, with tactics such as double extortion, where attackers not only encrypt data but also threaten to release sensitive information if the ransom demands are not met.
- **Increased focus on and exploitation of supply chain vulnerabilities:** Attackers are targeting vulnerabilities in the supply chains of organisations, recognising that vendors and suppliers can be a weaker point of entry into larger networks.
- **Quantum key distribution (QKD):** QKD offers inherently secure communication based on the laws of quantum physics, making it resistant to eavesdropping (even from future quantum computers). SDN architectures could leverage QKD to secure communication between controller and devices and establish end-to-end quantum communications path for applications.
- **Quantum networking:** Complex network optimisation problems, such as multipath routing, resource allocation and traffic engineering, could be solved far more efficiently than classical algorithms using quantum networking. This could also trigger new services orchestrated by SDN such as secure access to distributed quantum sensors or networked quantum computers.

Implications of AI adoption on the SDN market

- **Governance and compliance:** The proliferation of AI tools as shadow IT necessitates robust governance frameworks within SDN services to ensure compliance and security.
- **Evolving roles and skills:** As AI reshapes organisational structures, SDN service providers must adapt to changing roles and decision-making processes, requiring updated skills and training.
- **Quality assurance:** The increased use of AI in software development calls for stringent quality assurance practices in SDN services to mitigate risks associated with AI-generated configurations.
- **Growing need for investments:** AI's impact on data centres, network operations, the network edge and network components means data centre construction, networking, GPUs and cooling technologies are bound to support them in tandem.



- **Quantum's play beyond SDN:** While SDN principles (centralised control and programmability) are seen as crucial for managing the inherent complexity of future quantum networks, quantum itself presents an unprecedented opportunity in security and computational power for optimisation. This includes managing QKD systems, key pools, entanglement distribution and routing over quantum channels.

AI is becoming a key component of network and business operations among enterprises and communications service providers (CSP). In addition to enhancing the user experience, AI is driving revolutionary technologies through advancements such as autonomous networks and real-time network optimisation. Large vendors such as NVIDIA, Cisco, MITRE and Booz Allen are already collaborating to develop an AI-native 6G network, while innovations such as AI-RAN are making significant strides in the wireless sector. CSPs are under unprecedented pressure to deliver high-volume, low-latency data flows to maximise the potential of AI applications. As a result, the demand for data centres capable of handling this influx of data

is rapidly increasing. However, ISG has only considered service providers that are directly contracted by end enterprises.

Recent reports also highlight a significant achievement in quantum communications within the UK, as researchers at the Universities of Bristol and Cambridge successfully demonstrated the region's first long-distance (over 410km), ultra-secure data transfer and quantum-secured video call using existing, standard fibre optic cables. A key aspect of this breakthrough was the integration of multiple quantum-secure technologies, including different types of QKD and entanglement distribution, operating simultaneously with classical data traffic on the same network. This accomplishment demonstrates the potential feasibility of layering quantum security onto current communication infrastructure without requiring a complete overhaul, paving the way towards a large-scale quantum internet. However, quantum capabilities of service providers were not considered in this year's ISG IPL study.

Hence, together, integrated within an SDN architecture, AI and quantum could transform networks into highly secure, adaptable, self-optimising and efficient systems, fundamentally changing the SDN market landscape.

The deployment and cloud enablement of all advanced network types, including wireless connectivity, depend on SDN, which provides the necessary functionality and flexibility with different managed service levels and integrates seamlessly with major ICT security solutions, including 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	Product Challenger	Leader
Apcela	Not In	Not In	Product Challenger	Not In
Aryaka	Product Challenger	Not In	Not In	Contender
AT&T	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Boldyn Networks	Not In	Not In	Product Challenger	Not In
BT	Leader	Leader	Leader	Leader
Bytes	Not In	Not In	Not In	Contender
Capgemini	Product Challenger	Leader	Contender	Product Challenger
CDW	Not In	Market Challenger	Not In	Not In
Cognizant	Product Challenger	Not In	Contender	Product Challenger
Colt	Leader	Leader	Leader	Leader





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)
Comcast Business	Product Challenger	Product Challenger	Not In	Product Challenger
Computacenter	Leader	Leader	Rising Star ★	Leader
Deutsche Telekom	Leader	Not In	Leader	Not In
DXC Technology	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Evolving Networks	Not In	Contender	Not In	Not In
Expereo	Contender	Contender	Not In	Market Challenger
Exponential-e	Market Challenger	Not In	Not In	Not In
Flexiwan	Not In	Not In	Not In	Contender
Globalgig	Not In	Not In	Not In	Contender
GTT	Leader	Rising Star ★	Not In	Leader
HCLTech	Product Challenger	Leader	Leader	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)
Kyndryl	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Logicalis	Product Challenger	Product Challenger	Product Challenger	Not In
Microland	Rising Star ★	Product Challenger	Not In	Product Challenger
Mphasis	Contender	Contender	Contender	Not In
NCC Group	Not In	Not In	Not In	Market Challenger
NTT DATA	Product Challenger	Product Challenger	Not In	Product Challenger
Orange Business	Leader	Leader	Leader	Leader
Redcentric	Not In	Contender	Not In	Not In
Softcat	Not In	Not In	Not In	Product Challenger
Sonic Wall	Not In	Not In	Product Challenger	Not In
Sophos Group	Market Challenger	Not In	Not In	Not In





Provider Positioning

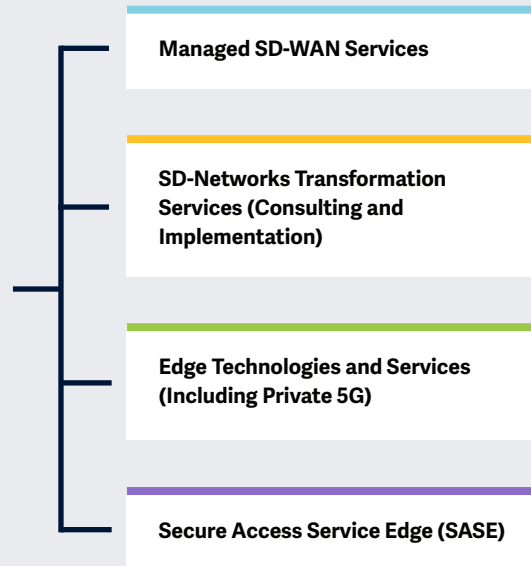
Page 4 of 4

	Managed SD-WAN Services	SD-Networks Transformation Services (Consulting and Implementation)	Edge Technologies and Services (Including Private 5G)	Secure Access Service Edge (SASE)
Tata Communications	Product Challenger	Not In	Not In	Rising Star ★
TCS	Product Challenger	Product Challenger	Product Challenger	Leader
Tech Mahindra	Product Challenger	Contender	Product Challenger	Product Challenger
Telent	Not In	Not In	Market Challenger	Not In
Verizon Business	Leader	Product Challenger	Leader	Product Challenger
Virgin Media O2 Business	Leader	Leader	Leader	Leader
Vodafone	Leader	Leader	Leader	Leader
Wavenet	Not In	Market Challenger	Not In	Not In
Wipro	Product Challenger	Product Challenger	Product Challenger	Product Challenger



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

Simplified Illustration Source: ISG 2025



Definition

This ISG Provider Lens™ Network — Software Defined Services and Solutions 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 organisations evaluate and assess providers' offerings and performance.



Scope of the Report

This ISG Provider Lens™ quadrant report covers the following four (spell out the number of quadrants; do not use a digit) 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/software vendors
- A differentiated positioning of providers by segments (quadrants)
- Focus on the regional market

Our study serves as the basis for important decision-making by covering providers' positioning, key relationships and go-to-market considerations. ISG advisors and enterprise

clients also use information from these reports to evaluate their existing vendor relationships and potential engagements.

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

Managed SD-WAN Services

Who Should Read This Section

This report is valuable for service providers offering managed SD-WAN services in the UK 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 the UK, empowering enterprises to select the right partner for network transformation.

Networking professionals

Should read this report to learn about the detailed provider landscape, providers' partnerships and capabilities 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.

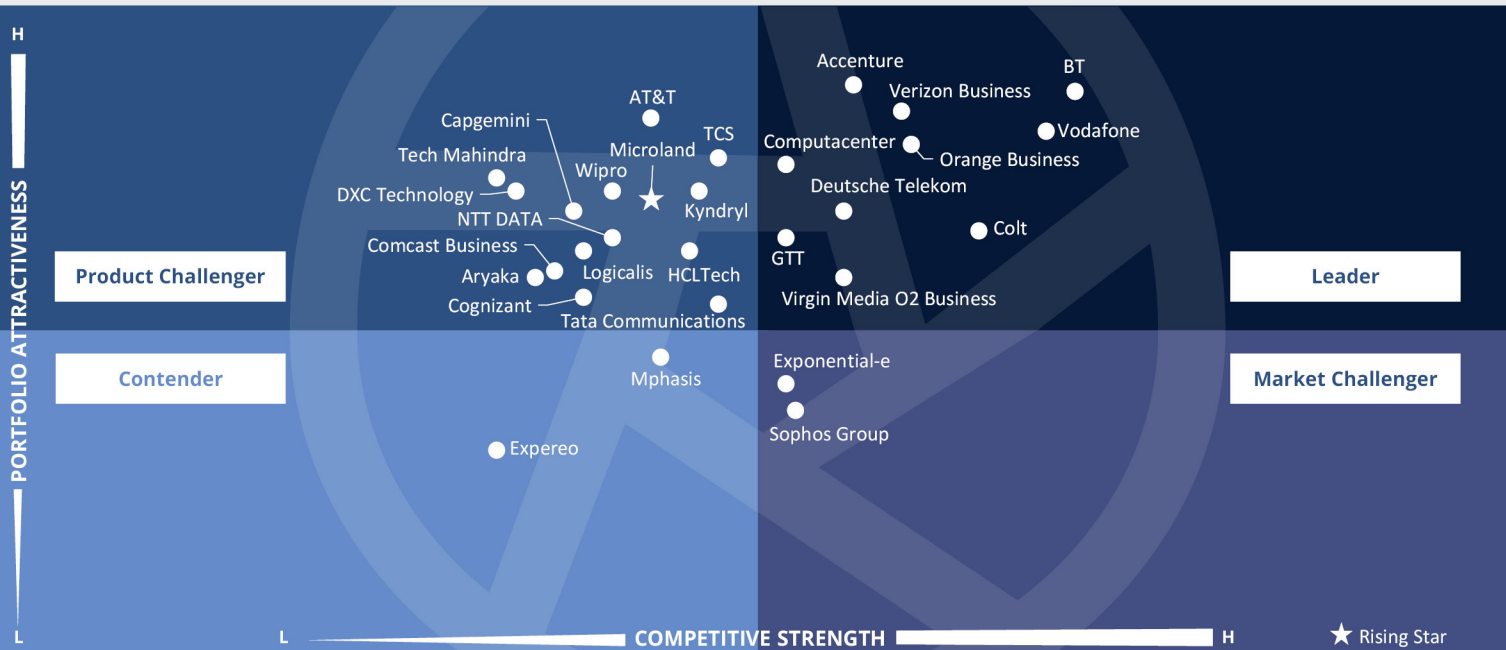
Procurement professionals

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



Network – Software-Defined Solutions and Services Managed SD-WAN Services

U.K. 2025



This quadrant evaluates providers that offer next-generation networks and enterprise managed SD-WAN solutions. It focuses on providers offering **comanaged** or **managed services** that enable **future-proof** and **cost-effective** networking transformations.

Yash Jethani



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 optimise 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 centralisation streamlines network management, making it flexible and agile. By abstracting software from hardware, SD-WAN enables network virtualisation, reducing recurring network costs, enhances networkwide visibility and allows for AI-Driven optimisation and zero-touch deployment with centralised 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 SD-WAN network including AI and Automation in Network Operations (AIOps)
5. **Proven capability** in seamlessly implementing new services and networks in commercial deployments
6. **Comprehensive and stable road mapping abilities**, allowing updates as required
7. Reference customer or cultural alignment or site **volume in deployment**
8. **Competitiveness** of offerings and types of commercial terms



Managed SD-WAN Services

Observations

As businesses embrace large-scale SD-WAN solutions for quick branch provisioning with dispersed edge sites, the area appears appealing from an investment perspective. As a result, many businesses are implementing fully managed or comanaged SD-WAN as part of their cloud migration and security strategy, demonstrating the continued high demand for managed SD-WAN services. For small businesses or specific industry verticals, the DIY SD-WAN solution is still an option.

Most organisations emphasise the integration of security features, a customer-centric approach and deep vendor partnerships to enhance their service offerings. There is a notable focus on utilising analytics and data-driven insights to improve network performance while also providing extensive operational support, frequently available round the clock. Additionally, many firms aim to reduce TCO for clients, with flexible solutions tailored to meet the diverse needs of various industries and hybrid work environments. The integration of AIOps for seamless management and an API-first approach to enhance CX

are distinguishing features in the SD-WAN landscape. Key capabilities such as zero touch deployment and robust network infrastructure further differentiate providers. Additionally, having extensive points of presence (PoPs) indicates a strong commitment to performance, while integrated SD-WAN/SASE architectures enhance user experiences. The introduction of secured frameworks to address modern network challenges highlights the innovative strategies being adopted by many in the industry. Although these solutions frequently begin with SD-WAN services and progress to incorporate more complex security features like SSE, a SASE installation serves as an essential building block for SD-WAN.

From the 70 companies considered for the country, 42 companies were assessed for this study, 29 qualified for this quadrant, with 10 being Leaders and one Rising Star.



Accenture leverages extensive vendor integration and partnerships to offer a preengineered SD-WAN stack combined with DDI and SASE solutions. This offering is further enhanced by round-the-clock operational support and AIOps, delivering seamless network management with a network-as-a-service model.

BT

BT's Global Fabric improves CX by adopting an API-first approach that makes it solutions business friendly, while reducing the TCO. A comprehensive vendor portfolio offers choices across multiple platforms with tailored propositions that enhance flexibility for various industries across the UK.



Colt's extensive fibre network in the UK and established market presence provide a strong foundation for delivering reliable and trusted managed SD-WAN solutions.



Computacenter is expanding its portfolio to include Fortinet SD-WAN, complementing its Cisco-centric offerings. Its global reach, coupled with robust analytics and insights leveraging data-driven intelligence, accelerates business innovation and optimises network performance.



Deutsche Telekom's vendor-agnostic platform, zero touch capabilities, the extensibility of its secure network platform and flexible delivery models offer competitive differentiation in the UK market.



GTT's SD-WAN proposition is characterised by its mature network infrastructure, strong emphasis on security, tailored service delivery, customer-centric approach and simplified network management through the Envision™ platform.



Managed SD-WAN Services



With over 650 PoPs, including strategically located SuperPoPs near customer cloud hubs, **Orange Business** guarantees high availability, low-latency SD-WAN connectivity.



Verizon Business delivers an integrated SD-WAN/SASE architecture for hybrid work. This architecture combines advanced security and networking functions with granular SLAs and AI-driven optimisation, enabling enterprises to prioritise mission-critical applications and tailor customisable solutions that enhance user experience without compromising performance.

Virgin Media O2 Business

In the UK, **Virgin Media O2 Business** leverages its customer-centric focus and innovative growth strategies to deliver tailored SD-WAN solutions, despite facing challenges from market competition.

Vodafone Business

Vodafone Business offers extensive network coverage, strong partnerships with leading tech firms for tailored SD-WAN solutions, advanced real-time analytics for proactive management and robust security measures to protect data integrity across various industries.



Microland's (Rising Star) ONE (One Network Experience)-SmartSec Branch, a comprehensive secured framework designed to protect contemporary networks, especially in the light of increasing reliance on cloud services, remote work and distributed configurations, integrates its SD-WAN/ SASE solution to provide robust security and enhanced network performance.



GTT



"GTT's SD-WAN capabilities in the UK are built on real-world success, multivendor alignment and platform innovation. With over 450 PoPs globally, it provides a unified, on-demand digital experience for global infrastructure, security and networking needs."

Yash Jethani

Overview

GTT is headquartered in Virginia, US. It has 2,200 employees across 26 countries. In FY24, the company generated \$1 billion in revenue. GTT's focus on security, underscored by its mitigation of over a million cyberattacks monthly, positions it favorably in the UK market, where security is a critical concern for businesses adopting SD-WAN. The company's comprehensive service model spans the design, deployment, monitoring and optimisation of SD-WAN solutions. Success stories from references illustrate its commitment to delivering zero-outage performance, proactive support and continuous innovation to drive customer satisfaction in the UK market.

Strengths

Transformative expertise: GTT's consistent delivery of SD-WAN rollouts in the UK, evidenced by projects with Mitsubishi Electric, Synamedia and Endress+Hauser, demonstrates its proven capability to orchestrate complex, distributed architectures across sectors. For Mitsubishi Electric, the company ensures robust outcomes with visibility tools and local PoP proximity.

Platform maturity: GTT's Envision platform integrates orchestration, observability and automation via EnvisionDX™, simplifying how enterprises configure and monitor policies across underlay and overlay networks. The company's SD-WAN portfolio integrates advanced security features, including SASE frameworks and threat intelligence,

benefitting European enterprises operating under stringent data protection regulations like GDPR.

Balancing innovation with flexibility: GTT's support for Fortinet, HPE Aruba, VMware by Broadcom upcoming Palo Alto Prisma options empowers UK CIOs to standardise or diversify their architecture without compromising feature parity, visibility or policy control.

Proven ROI: Documented outcomes, such as 187 percent bandwidth gains and 10–22 percent cost reductions, validate the ROI that GTT delivers. Its advanced systems offer a unique trading experience for banking customers, to provide them with a competitive advantage in today's fast-paced marketplaces.

Caution

Although GTT builds brand equity to protect its position against incumbents, upcoming changes to the EnvisionDX™ UX and API feature parity may disrupt current user workflows if not implemented carefully.





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 the UK 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 the best way to effectively consume SD-network transformation services and leverage providers' partner ecosystems.

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-network service providers.

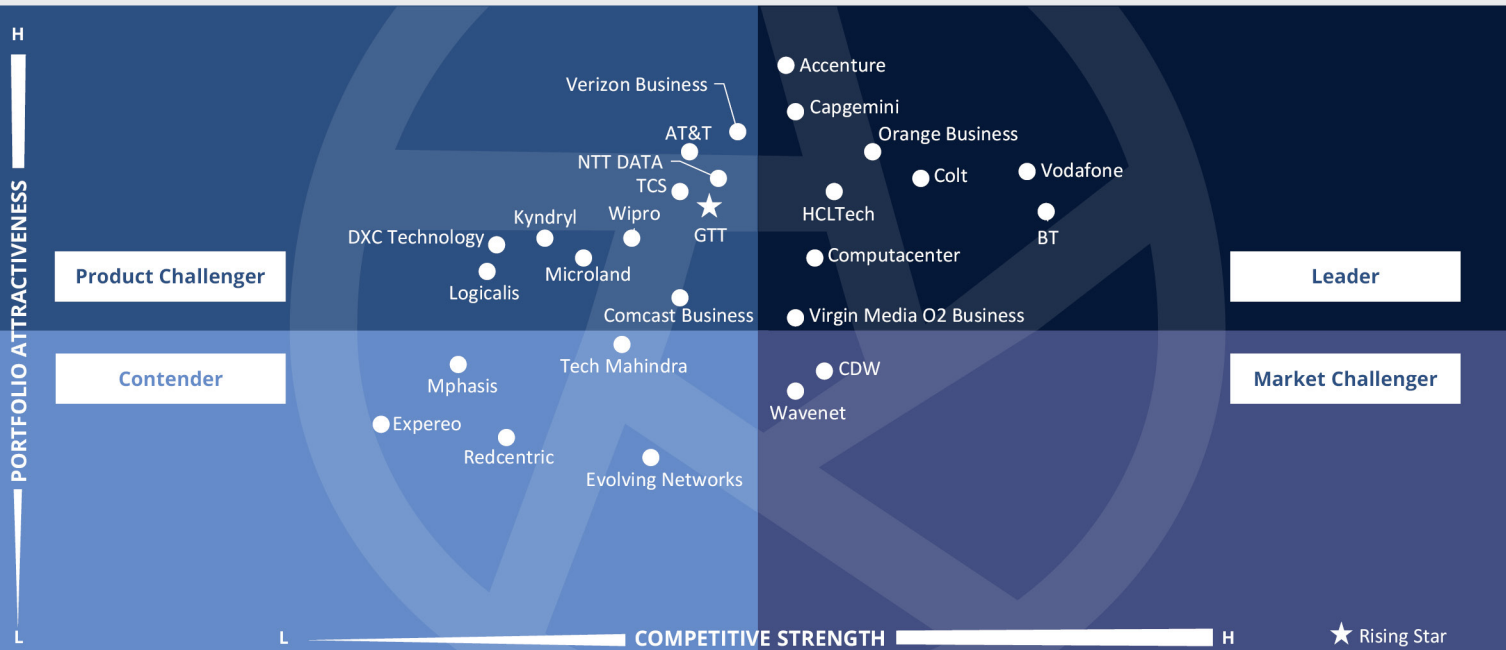
Procurement professionals

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)

U.K. 2025



This quadrant assesses providers that offer SDN **advisory, consulting and installation services**. These providers offer all-inclusive solutions that address the needs of clients at every phase of the process, from **preliminary consultation** to **complete implementation and maintenance**.

Yash Jethani



SD-Networks Transformation Services (Consulting and Implementation)

Definition

This quadrant analyses 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 organisations 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

SDN service providers commonly focus on partnerships that enhance visibility, automation and service management to offer scalable multicloud networking. They emphasise end-to-end services such as advisory, design, implementation and support for a smooth transition to agile networks. Service assurance, SLAs, AI and automation are key for operational efficiency. A customer-centric approach with tailored solutions and strong relationships is also a priority. However, some SDN service providers differentiate themselves through flexible engagement and global framework integration. Others offer comprehensive consulting via workshops and codesigned road maps. Unique features include AI-driven intelligence and sustainable infrastructure. Expertise in brownfield projects and data centre modernisation are also differentiators. Select providers emphasise innovative tech integration and trust-based relationships in sectors like government, alongside customer-led innovation.

Rising maintenance costs, stifled innovation, security vulnerabilities, compliance issues and poor user experience signal a deeper problem beyond temporary fixes. The question is not when to modernize But how to strategically modernize for future value? This requires rearchitecting the network for agility, security and scalability, enabling the effective integration of AI and IoT, facilitating seamless user experiences and maintaining robust cybersecurity. A holistic strategic approach is crucial, rather than relying on just tactical patches.

The network service providers in the UK have created internal consulting teams, mirroring the vendor-neutral approach of SIs and external consultants. These providers typically stay involved throughout the entire solution lifecycle, offering support from initial consultation to operation. To ensure smooth transitions, from corporate road map to well-implemented operations, many providers in this quadrant employ cutting-edge techniques.

From the 70 companies considered for the country, 42 companies were assessed for this study, 27 qualified for this quadrant, with nine being Leaders and one Rising Star.

accenture

Accenture's cloud-led transformation leverages vendor partnerships with Google Cloud and Aviatrix to enhance visibility, automation and service management across network operations. Thus, it empowers UK enterprises with scalable multicloud networking solutions and advanced AIOps capabilities.

BT

BT provides end-to-end SDN transformation in the UK with adaptable engagement models, strong Global Fabric integration and service assurance backed by SLAs.



Capgemini provides scalable, flexible and dependable SDN solutions that include sophisticated automation, proactive assurance and SLA-driven services with integrated management.



Colt combines AI-driven network intelligence, sustainable infrastructure, and rule-based optical engineering to deliver agile, self-optimising SDN transformations across WAN, LAN, Wi-Fi and data centre environments.



Computacenter's SDN services span advisory, design, implementation, testing and Day-2 support, ensuring customers can evolve from traditional networks to agile, intent-based architectures.



HCLTech

HCLTech offers UK enterprises data-driven and accountable SDN transformation through AI technologies, vendor-agnostic expertise and a growing regional presence.



Orange Business delivers outcome-oriented SDN consulting through strategic workshops, codesigning transformation road maps tailored to business imperatives, while offering end-to-end lifecycle services, deep technical expertise and Open Lab cocreation to ensure risk-free deployments.

Virgin Media O2 Business

Virgin Media O2 Business provides comprehensive SDN consulting services that enhance operational efficiency through agile methodologies, tailored digital transformation solutions, innovative technology integration and strong, trust-based client relationships, notably within public sectors.

Vodafone

Vodafone enables comprehensive SDN transitions through end-to-end network transformation capabilities, specialised expertise in brownfield projects, data centre modernisation using SDN/NFV, and a customer-led innovation model that emphasizes cocreation and lifecycle-centric engagement to align with strategic business goals.

GTT

GTT's (Rising Star) SDN consulting and implementation services in the UK are characterised by its expertise, customer-centric approach and a focus on enabling cloud adoption. The company's pod-based support structure and commitment to understanding customer outcomes are key strengths.



GTT



"GTT's commitment to understanding customer outcomes and prioritising development based on feedback enables it to provide tailored and effective SDN consulting and implementation services in the UK."

Yash Jethani

Overview

GTT is headquartered in Virginia, US. It has 2,200 employees across 26 countries. In FY24, the company generated \$1 billion in revenue. GTT's expertise in SDN and its Envision platform form a strong foundation for consulting and implementation services that help UK businesses optimise their network infrastructure. The company's focus on enabling cloud adoption through strategic guidance and technical expertise aligns with the needs of UK enterprises undergoing digital transformation. It provides a unified platform and seamless DX to simplify the management of network, security and cloud environments.

Strengths

Structured delivery discipline: GTT offers a structured engagement lifecycle, ranging from initial design to pilot testing and full-scale deployment, helping UK customers manage risks during LAN, WAN, Wi-Fi and data centre transformations. The pod-based model brings specialisation at each stage of the transformation. GTT's proactive approach to service assurance and investment in AI and ML tools enable it to deliver reliable and high-performance SDN solutions in the UK.

NFV and uCPE-driven flexibility: Customers negotiating expensive UK real estate and data centre consolidation benefit from using universal CPE and over 25 NFV nodes globally, reducing physical deployment friction and accelerating modification requests.

ESG alignment: GTT's proactive ESG road map, which includes its Corporate Sustainability Reporting Directive compliance plan and double materiality assessment, resonates with sustainability-conscious UK clients and enhances its credibility in public sector engagements.

Observability-driven governance: By correlating telemetry with AI-driven insights, GTT helps clients identify optimisation opportunities across legacy and modernised infrastructure layers. This visibility is essential for policy audits, SLA benchmarking and network hygiene management.

Caution

GTT could consider developing customer-facing tools for assessment and evaluation to provide enhanced transparency and control over the SDN implementation process in the UK. Furthermore, the data centre transformation narratives are largely global, limiting relevance to UK-specific legacy environments.





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 the UK 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, which provides enhanced visibility into the providers' security approach.

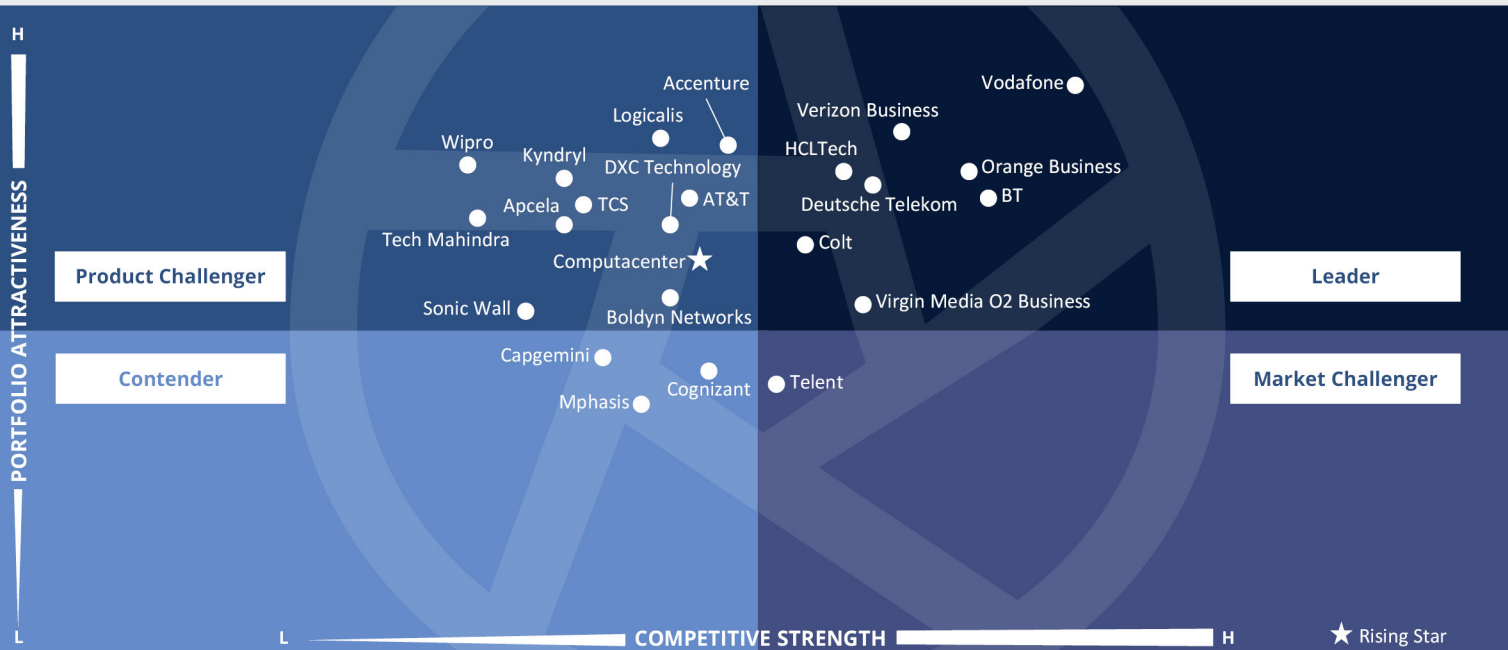
Data analytics professionals

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



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

U.K. 2025



This quadrant evaluates vendors offering various **network edge solutions** for enterprise networks such as **SD-LAN, private 5G with SD management** and **next-generation edge-focused products and services**.

Yash Jethani



Definition

This quadrant analyses 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 localised 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, analysed at the edge and then sent to a central data centre 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**



Observations

In the UK, edge computing has been expanding rapidly and consistently. Flexible campus network expansion, increased mobility and growing popularity of the hybrid working style are key factors driving this growth. Enterprise network edge technologies encompass a wide range of goods and services designed to enhance security, boost productivity and facilitate access to cloud-based apps. These factors have significantly accelerated the advancement of edge technologies, including branch, network and remote edges.

Edge computing and network solution providers commonly partner with hyperscalers to foster enterprise edge innovation and effective data connection. They focus on enhancing performance and reducing latency through integrated services. Multiaccess edge computing (MEC) integration is prevalent for low-latency applications. Modular and scalable solutions are emphasised to simplify edge computing adoption across various use cases. While some companies stand out with open-source and modular architectures for easier adoption, others offer unique combinations

such as edge intelligence, LAN-as-a-service and private 5G for specific sectors. AI-driven orchestration and integrations with AWS Wavelength and others provide tailored solutions. Specialised advisory services optimise private wireless deployment. Cost and regulatory challenges are key scalability factors for private 5G.

The rise of multicloud SDN, smart cities, secure infrastructure and open-source edge solutions is rapidly evolving edge computing and driving corporate innovation in the UK. This includes IoT (IIoT sensors and secure devices) and secure SD-LAN/WLAN. While network edge technology boosts performance, it poses challenges. NFV, edge computing and AI-enabled edge can decentralise processing power.

The usage of edge computing is growing every year due to the presence of robust industry verticals in the UK. This growth is further fuelled by global trends such as R&D, Industry 4.0, robotic devices, telemetry and metaverse.

From the 70 companies considered for the region, 42 companies were assessed for this study, 24 qualified for this quadrant, with eight being Leaders and one Rising Star.

BT

BT drives innovation through cloud hyperscalers and partner ecosystems for enterprise edge transformation programmes. This approach facilitates data connection in motion and at rest for businesses using the Global Fabric platform in a data-sovereign setting.



Colt provides robust edge solutions for all multinational corporations, featuring service management wrappers and API-led experiences.



Deutsche Telekom provides scalable, open-source and modular edge computing with EdgAIR, optimising performance and reducing latency, while simplifying edge computing adoption with full-stack, managed end-to-end services.

HCLTech

HCLTech empowers enterprises in the UK with integrated multiaccess wireless, flexible LAN as a service, edge intelligence and certified talent for seamless connectivity.



Orange Business integrates SD-branch solutions with managed LAN offerings to unify LAN, Wi-Fi, NAC and WAN management. It leverages MEC via SuperPoPs for latency-sensitive workloads and delivers modular AI-driven services to optimise UX and security.



verizon

Verizon Business has made a major investment in 5G, establishing a foundation for improved edge computing. This facilitates low-latency MEC services for applications such as robotic automation and smart factory monitoring, in addition to AI-driven orchestration, 5G solutions and multicloud management.

Virgin Media O2 Business

Virgin Media O2 Business stands out for its domain-focused and secure private 5G solutions, with a growing portfolio of real-world pilots. Mitigating cost and regulatory complexity will be essential for scaling momentum.

Vodafone

Vodafone is a leader in standalone private 5G deployment in the UK, integrating AWS Wavelength for lower latency, demonstrating vertical-specific use cases and providing flexible deployment options with consumption-based pricing to facilitate seamless adoption.



Computacenter (Rising Star) consistently delivers global edge solutions through its predefined offerings, combining various vendor offerings with system integration capabilities. It also provides specialised advisory and professional services for leveraging private wireless networks.





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 the UK 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 understand SASE service providers' expertise and their 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.

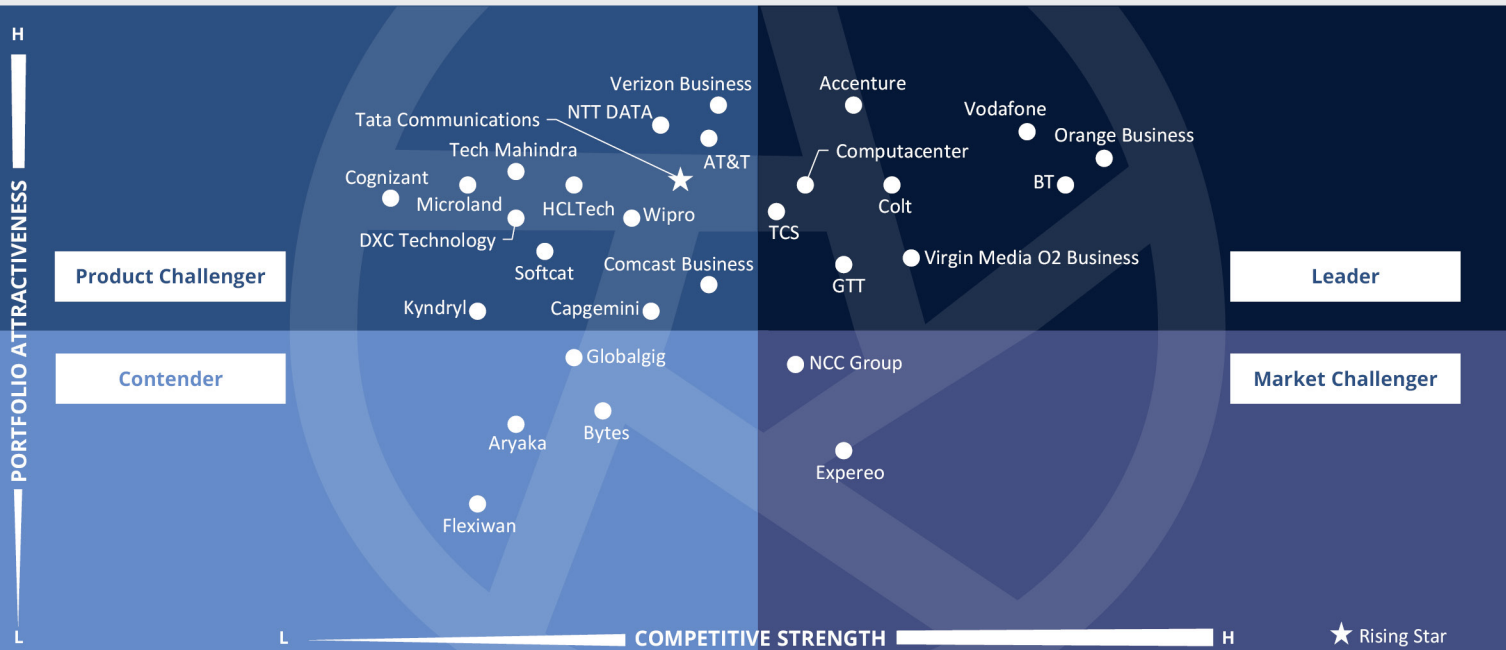
Change management specialists

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



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

U.K. 2025



This quadrant examines how SASE providers **integrate SD-networks and enhanced security in a solution-driven approach**, providing complete end-to-end solutions that cover everything from **core infrastructure** to **network and location edges**.

Yash Jethani



Secure Access Service Edge (SASE)

Definition

This quadrant analyses 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 (NGFW), 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 SASE market in the UK saw a notable uptick in 2024 due to the shift towards remote and hybrid work. The use of cloud-based security solutions increased due to the proliferation of distinct devices in various locations. The demand for cybersecurity and digital transformation initiatives is expected to accelerate further growth in the SASE market in the upcoming years.

SASE solutions commonly feature comprehensive portfolios and partnerships for enhanced security and deployment. Flexible, modular models allow tailored solutions meeting specific needs and compliance. Integration of cybersecurity expertise and zero trust addresses evolving threats. Many providers offer structured methodologies for a smooth transition to integrated SASE architectures. Distinctive SASE features include unique adoption frameworks scalability for phased growth and vendor neutrality with cloud-based options. Unified solutions

combining SD-WAN, cloud security and identity management offer agility. Strategic partnerships and tailored pricing also differentiate providers.

Providers tailor products for secure remote application access, emphasising consistent security at all network edges within a single-pane view. A comprehensive approach leveraging advanced security technologies such as DLP, RBI, SIEM and XDR is highly valued for a cohesive security posture integrated with broader policies.

Many SIs, service providers and telcos in the security sector are focusing on network and security convergence. Service providers are enhancing security with zero trust architecture. Collaboration with networking leaders, security OEMs and hyperscalers is key for developing integrated SASE offerings. As the demand for security solutions arises, partnerships with security vendors are expected to grow.

From the 70 companies considered for the region, 42 companies were assessed for this study, 29 qualified for this quadrant, with nine being Leaders and one Rising Star.

accenture

Accenture has strengthened its enterprise network security capabilities and offers a comprehensive portfolio of SASE solutions, supported by its expertise in the Cloud-First Networks in the UK through global collaborations and acquisitions.

BT

BT stands as a reliable, large-scale SASE deployment partner for extensive global networks. It demonstrates enterprise-grade implementation capabilities by collaborating with elite industry players and a premier partner ecosystem.

colt

Colt delivers a flexible, partner-driven SASE model in the UK, combining Versa's integrated security with self-service network control and broad geographic reach following the Lumen acquisition.

Computacenter

Computacenter's SASE solution is distinguished by its modularity, vendor neutrality and structured methodology. Its four-stage SASE advisory framework — strategic assessment, reference architecture, vendor evaluation and implementation — offers unmatched flexibility.

GTT

GTT's Secure Connect delivers tailored SASE solutions to meet customer needs and compliance, protecting against evolving cyberthreats. It offers cloud-based, single- and multivendor options to secure endpoints across offices, hybrid clouds and remote workforces.



Secure Access Service Edge (SASE)



Orange Business facilitates modular SASE adoption through its Evolution platform, enabling phased scalability from SD-WAN to full SASE architectures, while integrating cybersecurity expertise from Orange Cyberdefense™.



From advisory to professional and managed services, **TCS** provides on-premises proxy solutions to DIY across the region, enhancing UX, direct internet access (DIA), usability, security across SaaS app access and data security use cases.

Virgin Media O2 Business

Virgin Media O2 Business focuses on zero trust and AI-driven security to help organisations navigate evolving threats. Its ability to unify networking and security services positions it as a trusted, integrated solutions provider.

Vodafone

Vodafone's SASE solution combines SD-WAN, cloud security and identity management under unified management. It offers telco-grade SLAs with cloud-native agility, creates cross-sell opportunities through strategic partnerships, enables zero trust strategies for secure access and targets small and midsize enterprises with tailored pricing and simplified onboarding.



Tata Communications (Rising Star) offers flexible, performance-optimised SASE in the UK, managed via the AXIOM™ framework and TCx™ platform, built on an integrated network and security foundation.



GTT



"GTT is a strong player in the UK SASE market, driven by its high adoption rate, flexible solution offerings and focus on integrating network and security functions. The company's commitment to innovation and unified platform approach are key differentiators."

Yash Jethani

Overview

GTT is headquartered in Arlington, Virginia, US. It has 2,200 employees across 26 countries. In FY24, the company generated \$1 billion in revenue. The company's commitment to continuous improvement and innovation ensures that its SASE offerings remain competitive and aligned with the market's evolving needs. The company's commitment to providing a unified platform and seamless digital experience simplifies the management of SASE solutions for enterprises in the UK. Its global reach, expertise in addressing complex security requirements and emphasis on AI-driven threat detection position it well in the UK.

Strengths

SASE stack options: GTT supports both single- and dual-vendor SASE architectures which includes SD-WAN with Fortinet, HPE Aruba and VMware by Broadcom and Fortinet, Palo Alto and Zscaler as well as an upcoming HPE Aruba SSE integration — giving UK clients strategic control across user, branch and application edge. These partnerships ensure that its SASE solutions are robust and capable of addressing the diverse networking and security needs of enterprises in the UK.

Focus on cybersecurity: The launch of specialized security professional services (Q3 2025) adds depth to UK SASE offerings. With CREST-certified staff and an integrated NOC/SOC model, GTT stands out for its threat detection and response capability. Its

focus on integrating network and security functions through its Secure Connect offering addresses the critical need for comprehensive cybersecurity in the UK.

AI-enabled visibility: EVA™, GTT's proprietary AI assistant, enhances UK IT operations by enabling natural language interaction with service inventory and SLAs — bridging technical complexity for broader IT stakeholders.

Partner-driven sales execution: A strong channel presence and a consultative sales model make GTT attractive to UK MSPs and SIs, easing the adoption of SASE even in multi-tenanted or verticalised environments.

Caution

GTT should proactively communicate its roadmap for SASE evolution, including the integration of emerging technologies and threat mitigation strategies, to maintain customer confidence in the UK.





Appendix

The ISG Provider Lens 2025 – Network – Software-Defined Solutions and Services research study analyzes the relevant software vendors/service providers in the UK 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



Yash Jethani Pradeep
Senior Manager and Principal Analyst

Yash has over 14 years of professional experience, primarily in the technology, media and telecom (TMT) vertical. He has contributed to thought leadership, market and competitive research, consulting, business development, and due diligence as well as account management cutting across corporate marketing, risk, strategy, and sales functions.

Prior to ISG, Yash worked with KPMG in India supporting their national TMT practice in advisory, thought leadership as well as strategic pursuits. While at IDC, he was responsible for delivering custom as well as syndicated research for Telco & IoT Asia Pacific clients.

He has also had stints with CGI and TCS in supporting their corporate and account marketing initiatives with a focus on next-gen IT delivery within Telco/ Comms verticals. He currently contributes to ISG Provider Lens global research studies as a lead analyst for software defined networks, managed network services as well as telecom and media managed services studies across regions.

Yash holds a PGDM in Telecom & IT supported by an engineering degree in computers. He is also TM Forum certified and actively contributes as a member to the Bangalore Software Process Improvement Network, a non-profit.

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.



Author & Editor Biographies

Study Sponsor



Heiko Henkes
Director and Principal Analyst

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](#).

iSG Research™

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research™ delivers guidance that helps businesses accelerate growth and create more value.

ISG offers research specifically about providers to state and local governments (including counties, cities) as well as higher education institutions. Visit: [Public Sector](#).

For more information about ISG Research™ subscriptions, please email contact@isg-one.com, call +1.203.454.3900, or visit research.isg-one.com.

iSG

ISG (Nasdaq: III) is a global AI-centered technology research and advisory firm. A trusted partner to more than 900 clients, including 75 of the world's top 100 enterprises, ISG is a long-time leader in technology and business services sourcing that is now at the forefront of leveraging AI to help organizations achieve operational excellence and faster growth.

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.

For more information, visit isg-one.com.





JUNE, 2025

REPORT: NETWORK – SOFTWARE-DEFINED SOLUTIONS AND SERVICES