ISG Provider Lens™

Network-Software-Defined Solutions and Services

A research report comparing provider strengths, challenges and competitive differentiators.

Customized report courtesy of:

GTT

QUADRANT REPORT | JULY 2024 | U.S.

Table of Contents

Executive Summary 03

Provider Positioning 07

Introduction

Definition 11
Scope of Report 12
Provider Classifications 13

Appendix

Methodology & Team 42
Author & Editor Biographies 43
About Our Company & Research 45

Star of Excellence 39

Customer Experience (CX) Insights 40

Managed SD-WAN Services 14 – 30

Who Should Read This Section 15
Quadrant 16
Definition & Eligibility Criteria 17
Observations 18
Provider Profiles 20

SDN Transformation Services (Consulting and Implementation) 21 – 26

Who Should Read This Section 22
Quadrant 23
Definition & Eligibility Criteria 24
Observations 25

Edge Technologies and Services (including Private 5G) 27 – 32

Who Should Read This Section 28
Quadrant 29
Definition & Eligibility Criteria 30
Observations 31

Secure Access Service Edge (SASE) 33 – 38

Who Should Read This Section 34
Quadrant 35
Definition & Eligibility Criteria 36
Observations 37

© 2024 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

Report Author: Dr. Kenn D Walters

SD-networks across all enterprise types are now ubiquitous in secure cloud-enabled implementations.

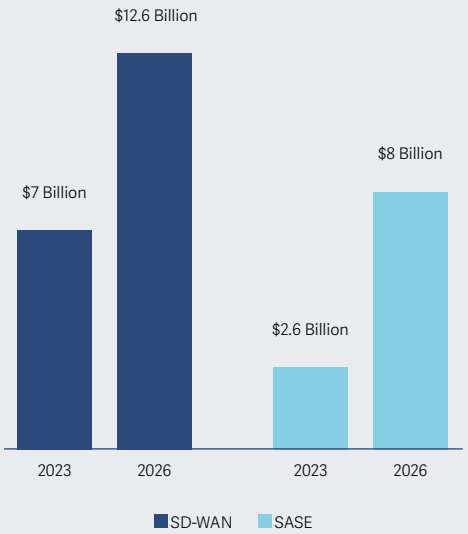
In enterprise networks and software-defined solutions and services, there are many different strategic areas and trends to consider, including technology, business coverage, and enterprise organization and its specific processes. These areas are closely aligned with the global trends of enterprise digitalization, business transformation, advanced and enhanced security, and cloudification. In this study, the ISG Provider Lens™ focuses on software-defined networking (SD-networking) in the U.S. This includes managed SD-WAN and other related technologies and services, such as transformation services, edge technologies (including private enterprise 5G), and secure access service edge (SASE).

The global SD-WAN market analysis shows that the U.S. is the largest consumer, generating approximately $3 billion in revenue in 2023. The U.S. accounts for more than 32 percent of the global SD-network solutions and services market as of the beginning of 2024. This means that U.S. service providers play a crucial role in transforming and shaping the global SD-WAN market. Highly advanced offerings with attractive consumption models from system integrators (SI) and widespread adoption of SD-WAN by traditional service providers and SMEs, shifting from rigid infrastructures, drive the growth of the U.S. market. This adoption aligns with the global digitalization trend and multicloud implementation by enterprises across different industries.

SD-networks are a **fundamental solution** for today's and **future enterprise demands.**

© 2024 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

Relative Growth of Global SD-WAN and SASE Market, Q1 2023 - Q4 2026



Source: ISG software-defined networks research

With its advanced technology and significant presence in the global SD-WAN market, the U.S. continues to strengthen its market primacy. It enthusiastically embraces technologies like big data, edge computing (including private 5G networks), advanced and enhanced security, SASE, mobility (including Wi-Fi 6) and branch SD-LAN and hybrid cloud and platforms, as well as significant automation, analytics and ever more sophisticated AI within the corporate network domains. Enterprises seek cost reduction capabilities while improving their flexibility, competitiveness, security, delivery structures, hybrid working capabilities and business continuity practices, striving for ever-better and enhanced CX and UX.

Implementing SD-WAN as an overlay on the existing underly hardware and infrastructure is often largely possible. It allows enterprises to leverage their current infrastructure while considering enhancements or replacements in a phased manner rather than opting for a total rip-and-replace of their enterprise network or branch equipment. Additionally, SD-WAN can effectively handle different types of connections and provide traffic division and protection across the entire WAN, including direct internet or multiprotocol labor switching (MPLS) underlays. It enables speedy migrations, including an essential feature of on-ramps to the cloud and full cloudification of the enterprise network. Enterprises are now appropriately incorporating existing SD-WAN implementations where they exist as part of a complete SASE solution, often obtaining it as a fully managed service from a managed service provider. SASE represents the convergence of enterprise networking and advanced security, with SASE or SD-WAN with SSE (security service edge) emerging as the fastest growing segment in the overall managed network services marketplace.

Some key factors that drive rapid changes in enterprise networks in the U.S. in 2024 can be outlined as follows:

Enhancing enterprise network flexibility and functionality with simplified operation: In today's business landscape, enterprises are increasingly focused on enhancing network resource integration, process integration, automation, network orchestration and operational management. One effective solution to these needs is SD-WAN, especially when delivered "as a service" (aaS) to the enterprise. By moving the control layer to the cloud, SD-WAN enables real-time management or monitoring through single-pane-of-glass access using policy and automation. This streamlined approach allows for seamless addition of applications and network resources without hardware implementations, facilitating efficient and secure achievement of business and user objectives. SD-WAN is, therefore, becoming a foundational enabler of many enterprise needs for today and the near future.

Cloud and multicloud migration risk reduction: As organizations migrate their information and communication technology (ICT) and network operations to the cloud, reducing complexity and mitigating risks become paramount. SD-networks play a crucial role in enabling a smooth and secure migration to single or multicloud environments for enterprises. By leveraging SD-WAN, businesses can navigate the complexities of cloud adoption, minimizing potential disruptions and enabling a seamless transition while ensuring single-pane-of-glass monitoring or control of their network end to end, from core to edge.

© 2024 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

Enhancing security across networks: Security has emerged as a top priority for businesses across almost all industries. Enterprises demand comprehensive and advanced security measures covering the entire network architecture. SD-networks provide a flexible but secure foundation to address these requirements, especially in cloud-based and hybrid networks. By adopting SD-WAN, businesses can deploy robust security measures and facilitate simplified full SASE deployments or add SSE to existing SD-WAN installations to create SASE, safeguarding their networks from threats in real time.

Accelerated adoption of SME SD-WAN: Research indicates continued growth of SMEs throughout the U.S. As a result, this segment is expected to experience fast growth in the next few years before reaching saturation. SMEs often have distributed workforces and rely heavily on affordable, easy-to-administrate cloud-based network and collaboration solutions. SD-WAN solutions provider SMEs with an affordable and efficient means to access robust cloud and security services, which can be scaled as they potentially expand their enterprises or branch/location estates. Enterprises can reduce monthly costs by using SD-WAN as overlays and access points. They can consume such services in an aaS and consumption-based manner.

Improved CX through aaS: Enabling clients to leverage advanced network services in a managed service or aaS manner, with modern payment terms and conditions, can enhance CX/UX rapidly at a low initial cost. SD-networking underpinned solutions in customer service customer experience (CCCX) or self-service manners can be delivered in fully managed or co-managed service types. This results in cost and complexity reduction and decreased implementation risks within the enterprise. Enhanced CX has become a critical factor for many businesses to remain competitive, while elevated UX has become vital to retaining experienced and talented employees.

Enabling a solid base for embracing innovative technologies and solutions: The rapid advancement of digital transformation toward fully digitalized enterprises, together with other technological innovations such as intent-based networks, automation, analytics, AI- and ML-driven solutions, self-healing networks, intelligent edge, SSE, SASE, SD-LAN and mobile LAN, including 5G connectivity and management, requires the foundational capabilities of SD-networks. By fully utilizing managed or co-managed SD-WAN, organizations can unlock the full potential of these innovative technologies, minimizing costs and implementation/operational risks and complexity and retaining an operational network overview. This ensures its required business functionality and services are effectively and competitively met.

The study's primary findings indicate that telecommunication service providers, network service providers and SIs, along with their partner ecosystems, offer a range of effective SD-WAN, security and SD-network solutions. These solutions can be tailored to specific industries or business verticals. Many enterprises have already embraced advanced SD-network-based innovations, such as intent-based networks with AI. Mobility and remote location solutions, such as SD-LAN or SD wireless LAN (SD-WLAN), are also in high demand, especially when combined with enterprise 5G solutions. The shift to cloud and multicloud environments has not reached saturation; it still drives changes in enterprise networking, supported by SD-networks. Additionally, adding SSE or implementing full SASE solutions enhances the capabilities of secure cloud and multicloud environments core to edge.

In this report, we explore the evolving demands of the market and present a comprehensive analysis of its different sectors. Additionally, we offer practical assistance in evaluating the products and services provided by a multitude of competing suppliers to make informed decisions.

© 2024 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

SD-networking delivers advanced and business-specific services. It serves as the intrinsic foundation for facilitating and streamlining the migration and deployment of advanced networks while minimizing the associated risks. It is a vital component of multicloud and SASE migrations.

© 2024 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

Provider Positioning

Page 1 of 4

	Managed SD-WAN Services	SDN Transformation Services (Consulting and Implementation)	Edge Technologies and Services (including Private 5G)	Secure Access Service Edge (SASE)
Accenture	Leader	Leader	Product Challenger	Leader
Apcela	Product Challenger	Leader	Leader	Not In
Aryaka	Product Challenger	Not In	Not In	Product Challenger
AT&T	Leader	Leader	Leader	Leader
BT	Market Challenger	Not In	Not In	Not In
CANCOM	Not In	Not In	Product Challenger	Not In
Capgemini	Not In	Product Challenger	Not In	Product Challenger
Cato Networks	Not In	Not In	Product Challenger	Leader
Colt	Rising Star ★	Product Challenger	Not In	Product Challenger
Comcast Business	Leader	Leader	Market Challenger	Product Challenger

© 2024 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

Provider Positioning

Page 2 of 4

	Managed SD-WAN Services	SDN Transformation Services (Consulting and Implementation)	Edge Technologies and Services (including Private 5G)	Secure Access Service Edge (SASE)
Computacenter	Product Challenger	Product Challenger	Not In	Not In
Crown Castle	Not In	Market Challenger	Not In	Not In
DXC Technology	Product Challenger	Contender	Product Challenger	Not In
Extreme Networks	Not In	Product Challenger	Leader	Not In
FatPipe	Not In	Not In	Contender	Not In
Flexiwan	Not In	Not In	Contender	Not In
Fortinet	Not In	Not In	Not In	Market Challenger
Globalgig	Contender	Not In	Not In	Not In
GTT	Leader	Product Challenger	Not In	Rising Star ★
HCLTech	Leader	Product Challenger	Product Challenger	Leader

© 2024 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

Provider Positioning

Page 3 of 4

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

© 2024 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

Provider Positioning

Page 4 of 4

	Managed SD-WAN Services	SDN Transformation Services (Consulting and Implementation)	Edge Technologies and Services (including Private 5G)	Secure Access Service Edge (SASE)
Orange Business	Leader	Leader	Leader	Leader
Pica8	Not In	Not In	Contender	Not In
Tata Communications	Product Challenger	Not In	Not In	Product Challenger
TCS	Not In	Product Challenger	Product Challenger	Not In
Tech Mahindra	Product Challenger	Leader	Product Challenger	Product Challenger
T-Mobile	Product Challenger	Product Challenger	Leader	Leader
Verizon Business	Leader	Leader	Leader	Leader
Wipro	Leader	Leader	Leader	Leader
Zensar Technologies	Contender	Contender	Not In	Not In
Zscaler	Not In	Not In	Not In	Market Challenger

© 2024 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

Analysis of SD-networks, edge and SASE solutions and services 2024.

Simplified Illustration Source: ISG 2024

- **Managed SD-WAN Services**
- **SDN Transformation Services (Consulting and Implementation)**
- **Edge Technologies and Services (including Private 5G)**
- **Secure Access Service Edge (SASE)**

Definition

This ISG Provider Lens™ study, Network – Software-Defined Solutions and Services 2024, analyzes multiple network offerings related to enterprise networks and SD-networking. These include managed software-defined wide area network (SD-WAN) services offered to enterprises. These fully managed services leverage the latest technologies and methodologies that are structured within a modern contractual framework. In addition, this IPL study looks at consulting and advisory, supply and implementation support in the SD-WAN area and the providers focused on such offerings. The study also looks at edge technologies and services, such as IoT, universal/virtual customer premises equipment (u/vCPE) and software-defined local area network (SD-LAN), including private mobile network delivery via 4G/5G technologies and the service offerings related to these segments. In addition, the study examines secure access service edge (SASE), which includes SD-WAN within its domain. SASE is an overarching, secure and fully integrated network environment for businesses. This IPL may be used in conjunction with the planned Managed Network Services IPL due for release in Q4, focused on non-SD-networks managed delivery.

ISG sets out to deliver 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 for 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 the offerings and performance of providers.

© 2024 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

Scope of the Report

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

This ISG Provider Lens™ study offers ICT and network decision-makers:

- Transparency on the strengths and weaknesses of relevant providers
- 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 (exceptionsare possible).

© 2024 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

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.

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.

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.

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.

© 2024 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

Managed SD-WAN Services

Who Should Read This Section

This report is relevant to enterprises across all industries in the U.S. for evaluating providers offering managed network services (primarily enterprise SD-WAN or hybrid multiprotocol label switching (MPLS)/IP WAN).

The quadrant aims to spotlight providers' expertise in enterprise network services and solutions, empowering enterprises to select the right partner for network transformation.

As traditionally managed network services lack flexibility, scalability and integrated security, enterprises are shifting away from traditional WAN technologies like multiprotocol labor switching (MPLS) to advanced SD-WAN solutions to modernize their networks. The associated challenges, such as enterprises' lack of security and network expertise and ever-evolving network complexity, drive U.S. enterprises to rely on managed network service providers.

ISG observes that U.S. enterprises using managed SD-WAN services are mostly inclined to add SSE security to their networks or transition fully to new SASE implementations. This unified approach to managed services for SD-WAN and security helps overall management. Enterprises are increasingly prioritizing service providers with advanced capabilities that can support them in various aspects such as hybrid connectivity, integrated network security, network observability and automated site-to-site connectivity.

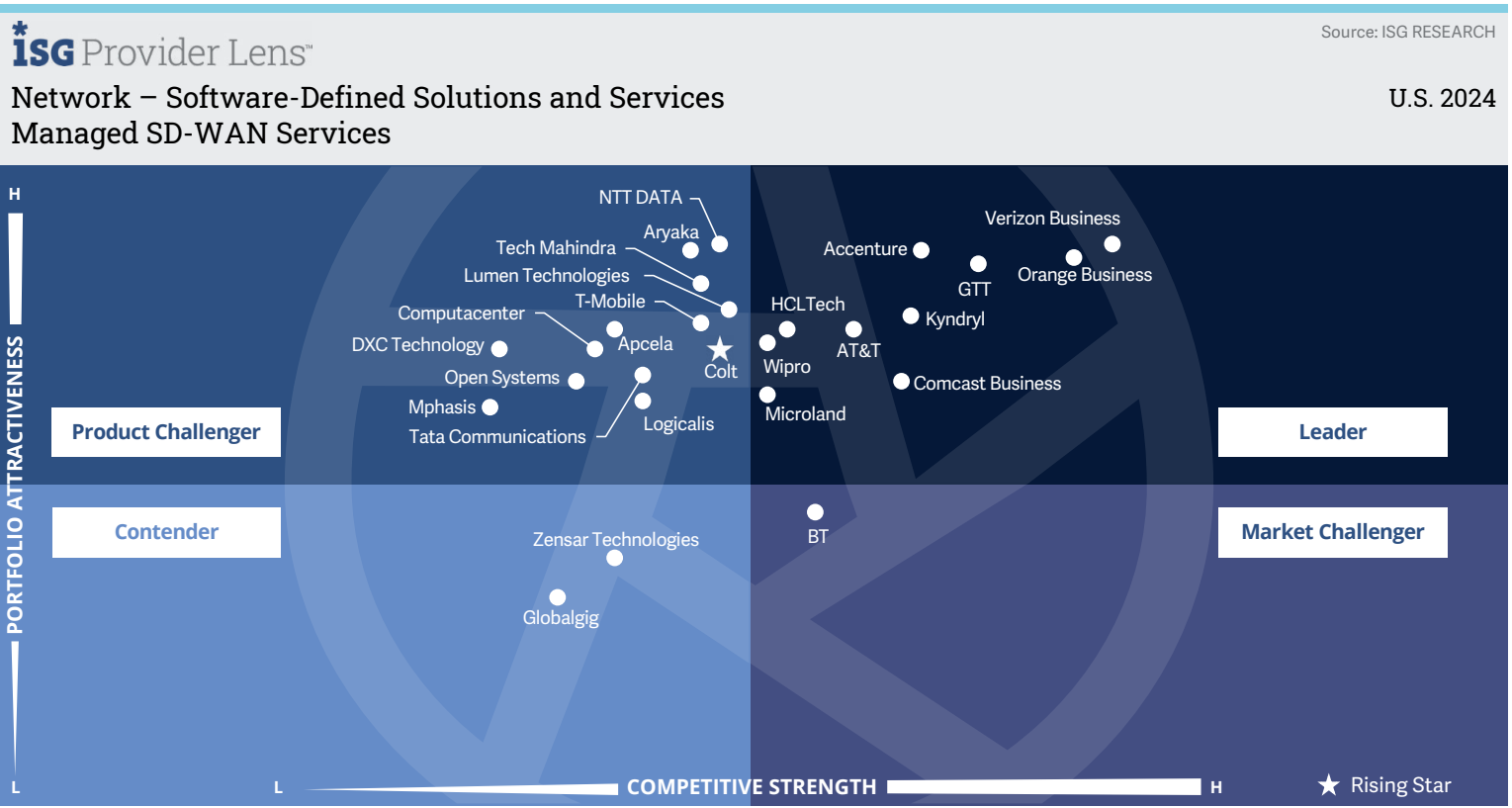
Networking professionals should read this report to know the detailed landscape, integration capabilities and partnerships of providers that can help effectively manage SD-WAN service consumption.

Digital transformation professionals should read this report to understand how managed SD-WAN service providers align with their enterprise transformation journey and compare against each other.

Cybersecurity professionals should read this report to understand the current state of security capabilities associated with consulting and other SD-WAN service providers' delivery.

Procurement professionals can acclimatize with managed SD-WAN service suppliers' terms, covering SLAs and KPIs, including service and quality levels, as well as pay-as-you-consume options.

© 2024 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.



This section evaluates the providers that offer **enterprise SD-WAN** and contemporary or future networks **that provide managed or co-managed solutions** and related services to corporate customers **to facilitate cutting-edge and future-safe networking.**

Dr. Kenn D Walters

© 2024 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

Definition

This quadrant examines the providers of enterprise WAN (primarily enterprise SD-WAN or hybrid MPLS/IP WAN) that deliver managed solutions and services. These include additional associated services such as fixed or mobile infrastructure and cloud-based software services directed toward streamlining enterprises' network operations. These may include new installations, replacement or upgrade installations, or hybrid cloud pathway installations accounted as networks. Regardless of the blend of network hardware and software, these services will be offered to enterprises as a service entirely managed by the service provider.

SD-WAN offers the benefits of software-defined technology over traditional hardware-based networking. It is an overlay architecture with a networking foundation that is easily manageable compared to legacy WANs, essentially moving the control layer to the cloud and centralizing and simplifying network management.

This overlay design abstracts software from hardware, enabling network virtualization and making the network more flexible. An SD-WAN architecture reduces recurring network costs, offers network-wide control and visibility, and simplifies the technology with zero-touch deployment and centralized management. The key aspect of an SD-WAN architecture is that it can communicate with all network endpoints without the need for external mechanisms or additional protocols. Suppliers have been increasingly active as managed service providers, offering complete managed SD-WAN solutions to enterprises (including hybrid MPLS/IP or MPLS/SDN solutions) and white-label products to telco providers or integrators as part of their broader strategic implementations.

Eligibility Criteria

1. Scope of product/service **managed WAN portfolio**
2. **Ability to deliver** and manage all hardware and software aspects
3. **Ability to effectively replace** (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
5. **Proven capability** in seamlessly implementing new services and networks in commercial deployments
6. **Comprehensive and stable road map,** allowing updates as required
7. Reference customer/site volume **in deployment**
8. **Competitiveness** of offerings and types of commercial term

© 2024 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

Observations

Enterprise networking in the U.S. continues to experience rapid growth in managed SD-WAN, followed by co-managed SD-WAN, as companies migrate to the cloud and prioritize security. The popularity of DIY SD-WAN solutions, which were initially favored, has gradually declined across the country, except for certain specific industries. This decline may be attributed to the increased complexity of modern enterprise networks and the challenges faced by businesses in maintaining and augmenting internal resources with the necessary skill sets for effective DIY operations.

Many providers have success stories for managed SD-WAN transition and operation in all industry sectors and verticals and in almost all enterprise sizes (large, multi-national, medium, small) within the U.S. The risks of using non-SD-WAN and the risks and benefits of full SD-WAN are well understood and documented with numerous case studies in the U.S. and globally.

In recent years, the U.S. market has witnessed a significant surge in the integration of increasingly intricate security solutions into enterprise networks. These solutions often incorporate SD-WAN and several advanced security functions, commonly marketed as SD-WAN + and similar variations. While these offerings bear similarities to SASE solutions, they do not encompass all the advanced security features of SASE. It is worth noting that a complete deployment or implementation of a SASE solution necessitates the inclusion of SD-WAN as a vital foundational component.

From the 84 companies assessed for this study, 26 qualified for this quadrant, with 10 being Leaders and one a Rising Star.

accenture

Accenture's Cloud First Networks + 5G practice brings together over 12,000 experts worldwide to cater to three specific client segments, with additional support from 23 network and security labs stationed globally.

AT&T

AT&T employs an automation strategy with service centricity, excelling in managing networks and integrating various infrastructures and service offerings into a fully managed portfolio with FlexWare℠, AT&T Network on Demand and AT&T managed network services.

Comcast Business'

Comcast Business' advanced managed SD-WAN solutions can be delivered in a fully managed or co-managed manner. It is a technology-neutral and highly skilled managed services provider, collaborating with top vendors to create solutions that perfectly align with customer needs.

GTT

GTT offers personalized solutions to meet each customer's unique requirements. It provides various integrated security features through its own and partner solutions, leveraging its global Tier-1 IP backbone to transport client traffic between locations.

HCLTech

HCLTech's managed SD-WAN services help enterprises transform their network environment into a flexible, consumption-based networking model that delivers the simplicity, agility and efficiency demanded by businesses.

kyndryl

Kyndryl provides expert consulting, implementation and managed network services to support core-to-edge operations, including a portfolio of hybrid cloud connectivity and a centralized monitoring and management system.

Microland

Microland aims to drive operational efficiencies through open networking, self-healing networks and intent-based networking supported by AI and cognitive capabilities. It offers end-to-end SD-WAN/SDN transformation and operational services.

© 2024 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

Orange Business offers managed, co-managed and bespoke delivery with advanced platform and operational models, which can align solutions with customers' specific environments. Expert operational teams support all models to allow permanent cross-advancement between customers.

Verizon Business has recently announced a strategic partnership with HCLTech, enabling Verizon to increase its operational capacity. It owns and operates its network, leading all customer acquisition, sales, solutions and overall planning and development.

Wipro's managed SD-WAN services are part of its Digital Network Services, including various solutions like Wipro Insightix™, NetFactory and #WANFreedom. Wipro delivers innovative and expansive solutions for managed SD-WAN.

Colt's

Colt's (Rising Star) SD-WAN solution is a reliable enterprise WAN seamlessly integrated into Colt's SDN and OSS environments. Its comprehensive managed services offerings can additionally offer full global secure underlay, rapidly gaining a market share.

© 2024 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

Leader

"GTT Communications (GTT) provides a variety of managed SD-WAN solutions from top providers, customized for its customers and supported by a Tier-1 backbone."

Dr. Kenn D Walters

GTT

Overview

GTT gives customers the flexibility to choose the technology that best suits their business needs, offering deployment options like Aruba, Fortinet, and VMware by Broadcom, where appropriate. All solutions are offered as a service OpEx. The company uses its global Tier-1 IP backbone to efficiently transport client traffic between locations worldwide, ensuring low latency and high performance. GTT offers highly experienced solution engineers, design engineers, project managers and a global technical team for on-premises hardware installation, ensuring timely and on-budget delivery. The company provides monitoring through its EtherVision portal.

Strengths

Supporting SD-WAN solutions with a Tier-1 underlay network: GTT manages multiple SD-WAN gateways in its core network, handling the routing of cloud-bound and private WAN traffic across the network. Its SD-WAN solutions optimize client networks in real time, utilizing AI to determine the best WAN circuit for routing traffic.

Tailored solutions with easy management: GTT offers client-centric, fully personalized solutions to meet each customer's unique requirements, offering varying levels of integrated security features through its own and partner-provided solutions. Its EtherVision portal provides robust management features and visibility into applications.

Improved application performance with full monitoring: GTT empowers clients to establish network traffic business policies and direct applications through optimal path selection. It also provides comprehensive monitoring of performance and bandwidth usage via the EtherVision web-based client portal.

Provider-neutral and fully secure network: GTT delivers SD-WAN services from VMware by Broadcom, Aruba Unity EdgeConnect SD-WAN and Fortinet's secure SD-WAN and Secure Edge, enabling a portfolio of varied managed security options to complement its network firewall solutions.

Caution

GTT focuses on multinational and large enterprises with multiple sites. It has a limited focus on the potentially lucrative midsize to large enterprise market. This positioning may hinder GTT's immediate expansion into this segment, which is experiencing significant growth.

© 2024 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

SDN Transformation Services (Consulting and Implementation)

Who Should Read This Section

This report is relevant to enterprises across all industries in the U.S. for evaluating providers of SDN transformation services that involve consulting and implementation.

The quadrant highlights providers' network service and solution proficiency in handling network transformation right from advisory and consulting to implementation.

The rise in the need among U.S. enterprises for single-pane-of-glass management to monitor the entire enterprise network is driven by increased private 5G proliferation in IoT, OT, and IT environments. To meet this demand, service providers offer SDN services for unified visibility and consistent security policies, which is crucial for smart buildings, infrastructure and factories. Enterprises anticipate providers to deliver solutions enabling them to capitalize on improved control, security and performance, ultimately optimizing their operations.

Due to the intricate nature of the SDN landscape, there is a growing trend among U.S. enterprises to opt for consultancy-led approaches and transition toward outsourcing models for SDN services. Service providers are expected to take a multifaceted approach to support enterprises effectively in their network transformation. Furthermore, they are also expected to provide more than advisory and consulting, guiding organizations through the implementation process while helping them with seamless deployments. Consulting firms and managed network service providers are actively involved in this space for delivering SD-WAN solutions.

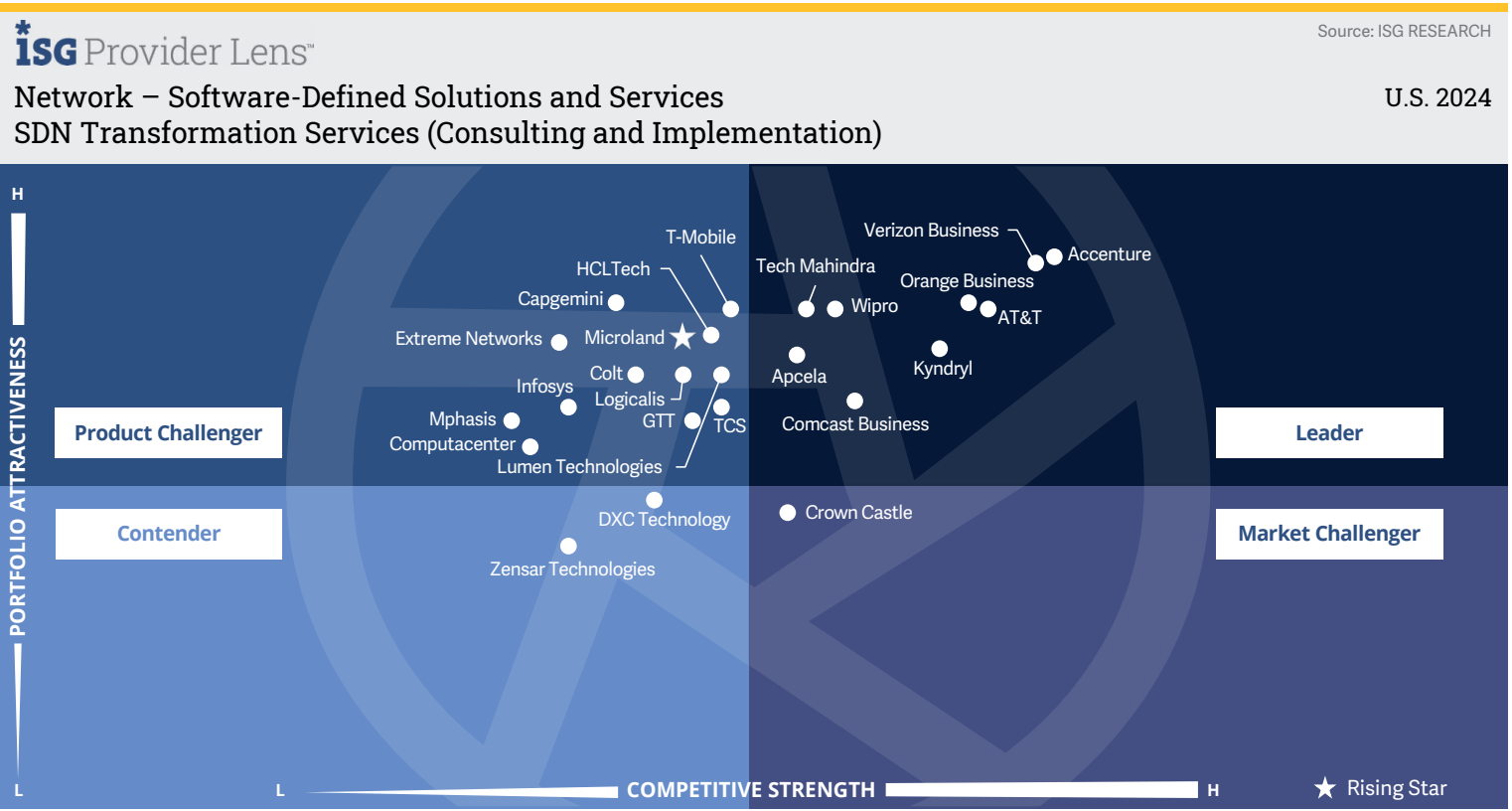
Networking professionals should read this report to understand the best way to effectively consume network transformation services and leverage service providers' partner ecosystem.

Digital transformation professionals should read this report to understand how network transformation service providers align with their enterprise transformation journey and compare against each other.

Cybersecurity professionals should read this report to understand the current state of security capabilities associated with consulting and other SD-WAN service providers' delivery.

Procurement professionals should read this report to learn about the payment schemes offered by transformation service suppliers, especially around pay-as-you-consume or similar payment arrangements.

© 2024 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.



In this quadrant, we evaluate companies that offer **advisory, consulting and implementation services** in SD-networking. These companies **provide practical solutions** and cover everything from **initial consulting to service implementation.**

Dr. Kenn D Walters

© 2024 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

SDN Transformation Services (Consulting and Implementation)

Definition

This quadrant analyzes providers of advisory or consulting and other services (for example, planning) associated with delivering SD-networking and SD-WAN to enterprises, from initial advisor consulting to service delivery and rollout, including testing.

Modern businesses require more agility, flexibility, automation and security across delivery areas and business domains, including private, public, hybrid and multicloud networking; mobile application usage in the workplace; IoT; Industry 4.0; infrastructure as a service (XaaS); and intent-based AI and ML networking solutions requiring a flexible network environment that can accommodate changes quickly with minimum human intervention. SD-networking provides many of these benefits compared with traditional hardware-based networking and is closely related to network function virtualization (NFV), cloudification strategies and digital transformation undertakings. However, it presents challenges in handling both legacy and transformed environments, highlighting the lack of skilled programmers or NetOps personnel in certain enterprise settings.

Many enterprises require independent advice or trusted consulting before making major organizational changes and prefer advisors who are not associated with the final network delivery.

Suppliers in this area are increasingly active as advisors or consultants for implementation to enterprises. They may also act as brokers and project managers to ensure combined coalition deliveries as planned. Consulting companies, prominent vendors and managed network service providers are also actively involved in offering SD-WAN packages in this area, independently or as a part of consortium deals.

Eligibility Criteria

1. Scope of product/service **portfolio**
2. **Ability** to provide consultation, from strategizing phase to technology deployment, and support in integration and implementation
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 post-pilot or **commercial deployment**
6. **Competitiveness of offering** and types of commercial terms

© 2024 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

Observations

Advisory-driven engagements are common in the U.S. because SD-networking is highly complex and requires expertise in enterprise- and industry-specific areas. Additionally, future-state technology planning is necessary to meet enterprises' business needs. These engagements often involve skilled advisory teams with deep industry experience, from pre-sales and road mapping roles to implementation support in many cases. However, it is important to note that these teams often propose vendor-specific solutions if they are part of a provider offering rather than an independent advisory company.

The trusted partner role in advisory has often led enterprises in 2024 to seek the assistance of both traditional consulting firms and system integrators (SIs) for strategic and tactical planning. Both of these companies deploy advisory staff committed to providing advice without bias toward any vendor. They compete to develop the most suitable plan for the enterprise. Leveraging their intellectual property and partner networks, they implement solutions that meet the client's needs as they progress beyond the road map stage and into the procurement and supply stage.

Major network service providers in the U.S. and other regions have added consulting and advisory teams to their business units to keep up with this trend. These companies are striving to provide vendor-neutral solutions and a unique set of services similar to consulting firms and SIs. They also offer partner ecosystem solutions to cater to their clients' needs.

Many providers utilize advanced methods, qualifications, and implementation steps within this quadrant to ensure seamless transitions from a business road map to efficiently implemented operations while minimizing risks.

From the 84 companies assessed for this study, 25 qualified for this quadrant, with nine being Leaders and one a Rising Star.

accenture

Accenture has developed deep industry expertise that enables it to deliver solutions tailored to client needs and industry trends. The practice is constantly evolving through organic growth and acquisitions.

Apcela's business

Apcela's business strategy focuses on transformation advisory services and the use of the Arcus Platform whenever feasible, delivering a range of managed services, cloud centricity, enterprise hybrid WAN networks, SD-network and security IaaS solutions.

AT&T

AT&T offers specialized business and technology services tailored to different industries within the networking sector, as well as advanced knowledge of next-gen networks. The company emphasizes cloud-first networks and SD-WAN solutions.

Comcast Business

Comcast Business provides expert advisory teams and advanced tools to assist in the specification and delivery of managed SD-WAN secure solutions that are fully SASE-compliant. These solutions can be fully managed or co-managed with customers.

kyndryl

Kyndryl focuses on consulting, design, implementation and managed services and has been actively adding experienced staff to its advisory team. Its strategy involves delivering comprehensive core-to-edge solutions.

orange Business Services

Orange Business can provide its customers with ongoing and/or punctual end-to-end consulting and accompaniment for each SD-WAN/SASE transformation project. This starts with a context assessment and continues up to the running phase.

© 2024 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

Tech Mahindra provides advisory services backed by industry experience, tools and processes to offer network-as-a-service (Naas) models. Its advisory services are complemented by advanced managed services, engineering support and cutting-edge automation solutions.

Verizon Business takes a consultative approach to guide businesses through the transition to SD-networks, boasting of a highly skilled team in this domain. The company is committed to investing in tools for integration, platforms, orchestration and automation.

Wipro's digital network practice utilizes Insightix™, a digitized framework for consulting and assessing current estate, to provide a short-term and long-term transformation road map aligned with business goals.

Microland

Microland (Rising Star) uses the Microland Intelligent Network Experience – Consult framework to create business cases, provide advisory services, and compare SD-WAN technologies. It also provides consulting/ advisory services for holistic next-gen technology architecture aims.

© 2024 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

Edge Technologies and Services (including Private 5G)

Who Should Read This Section

This report is relevant to enterprises across all industries in the U.S. that evaluate providers offering technologies and services for the critical network edge. These include hardware, software, management and reporting tools, applications and other services associated with the network edge.

In this quadrant, ISG lays out the current market positioning of edge technology and service providers in the U.S.

Increasing AI applications across all industries in the U.S. drives the adoption of edge AI. With the ability to perform at the edge, edge AI enhances efficiency, decision-making and CX. Enterprises prefer AI-enabled edge services for optimized resource allocation, security enhancement and dynamic adaptability in network management.

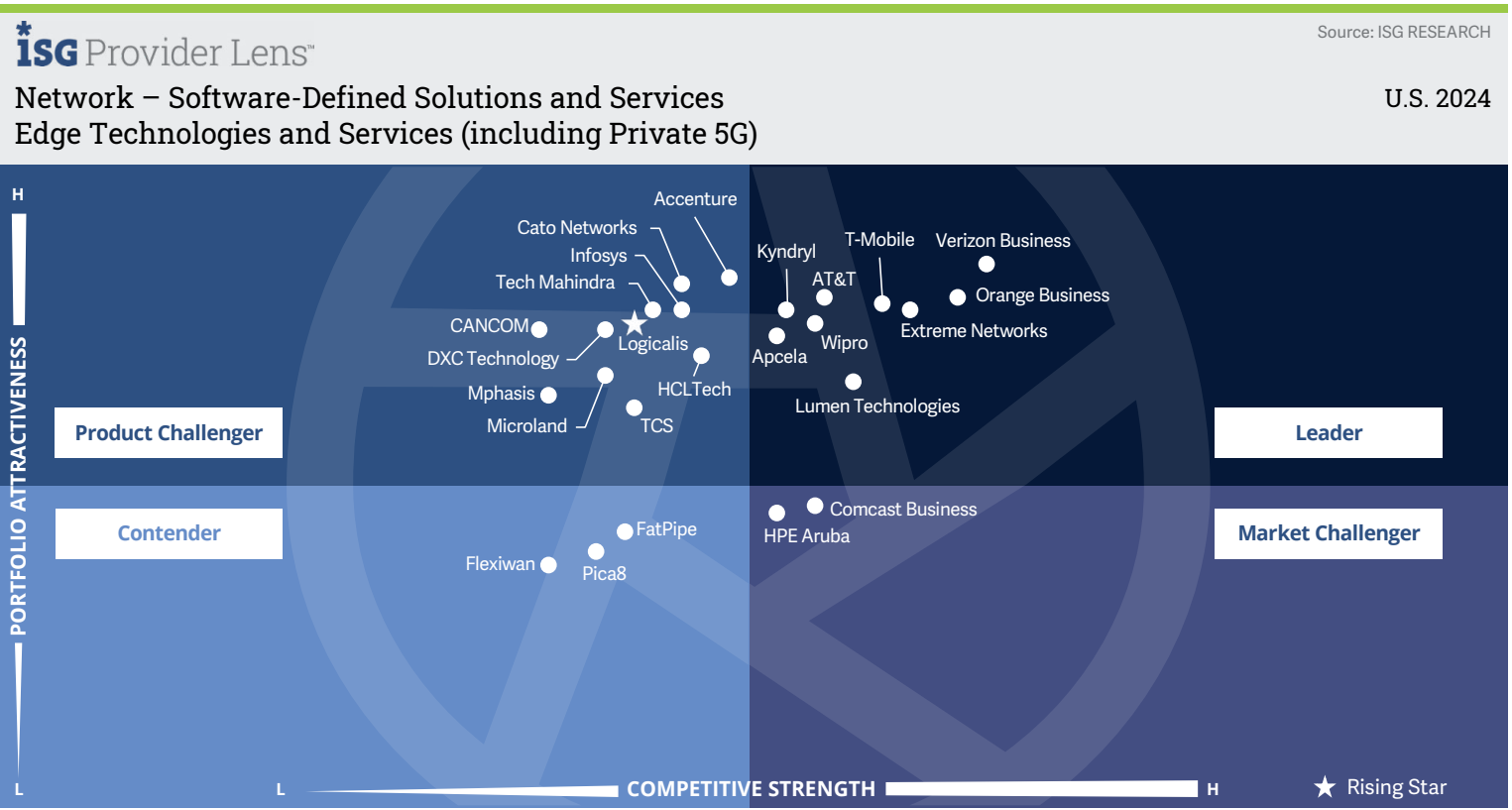
ISG observes growing demand around consuming enterprise networks in the network-as-a-service (NaaS) model, encompassing various networking trends such as private 5G and network automation, enabling enterprises to achieve better control over network costs, align network services and optimize business outcomes. As enterprises in the U.S. move toward cloud-based solutions, NaaS becomes a logical choice, replacing legacy network configurations and offering enhanced connectivity options. Service providers are expected to provide transformative solutions to enterprises, enabling them to adapt to changing networking requirements efficiently and cost-effectively.

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

Digital transformation professionals should read this report to understand how mobile network transformation service providers align with their enterprise transformation journey and effectively leverage their partner ecosystem.

Cybersecurity professionals should read this report to understand the security posture associated with mobile network service providers and the associated vulnerabilities that are inferred with digital assets.

© 2024 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.



This section examines providers that offer a range of solutions for the **network edge in enterprise networks.** These solutions include **SD-LAN, private 5G with SD management** and **comprehensive edge solutions** and services.

Dr. Kenn D Walters

© 2024 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

Edge Technologies and Services (including Private 5G)

Definition

This quadrant analyzes vendors that deliver technologies across hardware and software, management or reporting tools, and applications and services associated with edge network technology, including private software-driven 5G solutions, to enterprises.

Edge technologies, services and computing are current trends in IoT and IIoT, where connections are often through private 5G networks via an SD orchestration, for speed and flexibility. These are becoming increasingly important among many enterprises.

With the localized processing of data, security and privacy can be improved as any breach can be managed locally and not passed on to the WAN or cloud and, thus, back to the central enterprise to defend. In IoT edge computing and networking, data from various connected devices in the IoT ecosystem is typically collected in a local device, analyzed on the network, and then transferred to the central data center or cloud.

As the number of connected devices has increased exponentially, the volume of data generated is multifold. This, in turn, places high importance on efficient and software-driven edge capability networks with SD-driven connectivity capabilities.

Edge components can be managed in the same manner as core and SD-WAN components. Software-defined capabilities comprise branch and edge functionalities, along with all customer premises equipment (uCPE or vCPE) and associated software-defined mobile networks (SDMNs) and SD-LANs that include wireless (SD-WLAN) and mobile (SD-WMLAN) networks, private 5G networks, and IoT sensors and devices or control/security devices.

Eligibility Criteria

1. **Product portfolio coverage,** focus areas, and completeness of modular or area solutions
2. **Ability to integrate** into broader solutions
3. **Understanding of the overall market,** technology environment and evolutions and contributions to the same, together with **industry-specific knowledge and experience**
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**

© 2024 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

Observations

The enterprise network edge, the boundary between the internal network and external networks or the internet, plays a pivotal role in ensuring seamless connectivity and data flow for organizations. Enterprise network edge technologies encompass a wide range of solutions to enhance security, optimize performance and enable efficient access to cloud-based services. In recent years, there has been a significant surge in the expansion of edge technology, including edge computing, network edge, branch edge and remote edge.

New technologies and processes like IoT, which encompasses IoT and IIoT sensors and devices along with control/security devices, as well as SD-LAN, SD-WLAN and SD-MWLAN, have contributed to the rapid development of this sector.

Implementing network edge technologies in enterprise networks offers numerous benefits but comes with many challenges. One of the key benefits is improved network performance and reliability. By leveraging technologies such as edge computing, SD-networking and network function virtualization (NFV), enterprises can distribute processing resources much closer to the network edge. This reduces latency, enhances application performance, enables real-time data processing and enhances overall network efficiency.

Due to these benefits, edge technology has become a major focus for enterprise network decision-makers. It is also used at a strategic level, as the network edge intersects with various global trends such as real-time analytics processing, Industry 4.0 advancements, robotic devices, telematics, and telemetry. Both in terms of year-over-year growth and enterprise adoption, the edge technology continues to expand.

From the 84 companies assessed for this study, 25 qualified for this quadrant, with nine being Leaders and one a Rising Star.

Apcela's

Apcela's innovative products, including AppHUB, Alpha and Arcus platforms, along with Arcus services, are designed to provide advanced security and mobility solutions for the edge, with advanced security pushed to the network edge through automation.

AT&T's

AT&T's Network Edge enables quick responses with high-performance networking and low latency for nearby workloads. It offers scalability and compatibility with leading cloud providers, seamlessly integrating with 5G and fiber services.

Extreme Networks

Extreme Networks specializes in innovative networking, edge and mobile applications. Its Smart OmniEdge network solution delivers a seamless wired/wireless infrastructure for cloud or on-prem deployment, incorporating AI features and a centralized management system.

kyndryl

Kyndryl provides an edge solutions team focused on robust edge optimization and transformation, backed by highly experienced 5G and wireless network experts with a range of powerful solutions.

LUMEN

Lumen Technologies offers its edge fabric platform to enhance network resilience, extend cloud services and maintain high availability and control. It integrates compute, cloud, storage, networking, CDN, security and orchestration into a complete stack.

orange Business Services

Orange Business' Evolution Platform is designed to allow massive extensibility at the edge of the network. This offers a unique way of partnering with technology vendors, providing customers with faster and safer access to partners' innovations.

© 2024 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

T-Mobile's

T-Mobile's private mobile network caters to high-performance applications like industrial automation and autonomous robots. T-Mobile offers enterprise clients edge computing and hyperconverged infrastructure for storing and processing.

Verizon Business provides a range of network edge solutions, including virtual network service (VNS), intelligent edge, private 5G and multi-access edge computing (MEC). Additional offerings encompass AI, orchestration, SD-WLAN, SD-LAN/SD-WAN integration and multicloud management.

Wipro leverages its own products and services along with its extensive partner network's solutions to deliver value to both telco and non-telco enterprises, including Edge Cloud and the BoundaryLess Universal Edge (BLUE).

Logicalis (Rising Star) offers consultation, implementation and managed services for all types of network connectivity (including SDN and private 5G), leveraging leading-edge technology and solutions with advanced orchestration and management tools.

© 2024 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

Secure Access Service Edge (SASE)

Who Should Read This Section

This report is relevant to enterprises across all industries in the U.S. for evaluating enterprise SASE service providers.

In this quadrant, ISG lays out the current market positioning of SASE service providers in the U.S. and how they address the key challenges faced by enterprises.

The U.S. is witnessing a significant rise in the adoption of hybrid and remote work models, spurred by technological advancements that have challenged traditional enterprise network and security models. Enterprises are pushing their boundaries to integrate advanced security measures across the entire network landscape. To meet this growing demand, service providers partner with security experts to deliver comprehensive, secure network transformation.

As zero trust networking (ZTNA) gains traction, integrating with SASE becomes a logical next step for enterprises moving toward a cloud-based infrastructure. This shift toward converged SASE and ZTNA frameworks enables consistent security across all access, including on-premises and cloud. U.S. enterprises strongly emphasize that providers demonstrate their capabilities by offering a range of features within their SASE solutions, combining networking and security functions into a unified cloud-based service to enhance their security, streamline operations and improve network performance.

Networking professionals should read this report to understand SASE service providers' capabilities and their technical and integration capabilities and partnerships.

Digital transformation professionals should read this report to understand how SASE service providers align their enterprise digital transformation journey and how they are compared to one another.

Cybersecurity professionals should read this report to understand the current state of security capabilities associated with the providers of consulting and other SASE services' delivery.

Procurement professionals should read this report to acclimatize with SASE service suppliers, especially around new pay-as-you-consume options instead of traditional models.

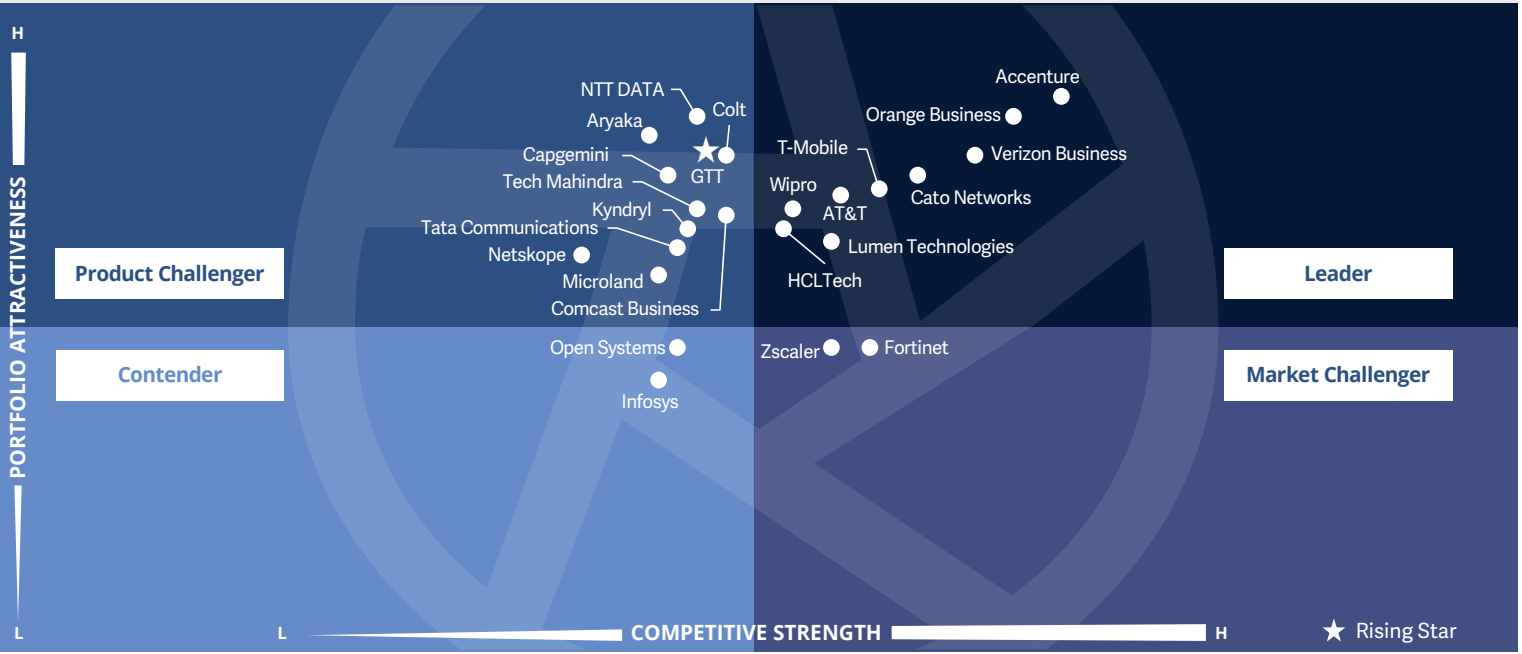
© 2024 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

ISG Provider Lens™

Source: ISG RESEARCH

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

U.S. 2024



In this quadrant, we examine **SASE solution providers' comprehensive approach** to **combining networks and security measures.** These **packaged solutions** provide end-to-end network coverage from the core infrastructure to the outermost edges.

Dr. Kenn D Walters

© 2024 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

Definition

This quadrant analyzes SASE solutions that are offered to enterprises as overarching integrated networks and security solutions from the enterprise core to the edge. These include solutions moving into pilots and those already deployed commercially.

Enterprises are increasingly focusing on migrating their ICT and network operations to the cloud, while enhancing security in all touchpoint areas. SD-networks have proven to efficiently assist with this by reducing complexity and facilitating risk-reduced migration to single or multicloud environments for enterprises. Network-integrated security has been evolving continuously, with the inclusion of components such as proactive detection and response solutions, zero-trust networking, and identity-based security and authentication. This is often referred to as SSE when added to an existing network. Many providers supply a combination of identity-based authentication, SASE and network security to create a holistic, secure-by-design approach for the network of the future. The major components of SASE include SD-WAN, cloud access security broker (CASB), next-generation firewall (NGFW) and firewall-as-a-service (FWaaS), zero-trust network access (ZTNA), and secure web gateways (SWG). These encompass secure and integrated access from the data center (which may include network function virtualization [NFV]) to branch or edge, including SD-LAN or its wireless or mobile variant.

Suppliers in this area have been increasingly active as advisors or consultants for implementation, providing complete pilots and solutions to enterprises. Prominent vendors and managed network service providers are also actively involved in offering SASE.

Eligibility Criteria

1. **Product portfolio coverage, focus areas, completeness of solutions,** 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 the existing network** and ICT solutions, instead of 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 solutionsin commercial deployment
8. **Competitiveness** of offerings and types of commercial terms

© 2024 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

Observations

The concept of integrated secure enterprise networks has existed for many years in a granular and non-integrated form. However, fully integrated forms have emerged recently under the acronym SASE. After much discussion, there is now a consensus on the various components that make up SASE (please see the definition section of this quadrant). The consensus has led SASE to transition from pilot projects to numerous commercial deployments, supported by reputable providers offering robust solutions.

In the U.S., SASE represents one of the fastest-growing segments within the enterprise transformation and networks sector. The growth rate is projected to increase faster over the next few years. This extensive growth is driven by the emergence of new disruptive SASE players in the market and established system integrators partnering with leading SASE solution providers to deliver comprehensive end-to-end secure network transformation for their corporate clients.

The term SSE (security service edge) can be puzzling to many people. It is used to describe a collection of cloud-based security tools, including CASB, SWG, FwaaS and ZTNA, which form a major portion, ranging from half to two-thirds of complete SASE architecture. As explained in our quadrant definition, SASE represents the merging and incorporation of all SD-networking and security capabilities within a cloud infrastructure. The SSE stack is particularly interesting to early adopters of SD-networking in the U.S. as it can supplement and integrate with existing SD-WAN, establishing a less comprehensive but SASE-like solution within an organization.

From the 84 companies assessed for this study, 24 qualified for this quadrant, with nine being Leaders and one a Rising Star.

accenture

Accenture delivers services from its Cloud-First Networks + 5G unit, prioritizing security, predictability, scalability and flexibility. It results in a modern, software-defined, and cloud-native network that facilitates SASE for enterprises.

AT&T

AT&T excels in the SASE sector by combining partner capabilities with its own products, offering advanced multivendor-managed SASE services. The company's Cybersecurity Consulting division provides end-to-end advisory services for SASE.

Cato Networks

Cato Networks stands out as the sole provider offering a SASE and SSE platform with cloud-based agility and reach. By consolidating security features into a cloud-native stack, Cato Networks eliminates the need for multiple edge security devices for either SASE or SSE.

HCLTech

HCLTech delivers a cloud-based SASE security platform seamlessly integrated with the Fusion Platform, enhancing user experience, streamlining operations and providing cost-effective solutions.

LUMEN

Lumen Technologies provides solutions that merge features from several top SD-WAN providers with its network security capabilities into a unified SASE stack with global availability. The SASE stack can be accessed through its comprehensive online management and purchase system.

orange Business Services

Orange Business integrates a partner's security-driven networking technology into its Evolution Platform to reinforce security and networking convergence while enhancing performance. This guarantees real-time service updates and exceptional CX.

© 2024 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

T-Mobile, the Business Group partnership with Versa, is important in the SASE domain merging both providers' core strengths. Its U.S. operation focuses on expanding its partner ecosystem and announcing new partnerships in the SASE space this year.

Verizon Business' Advanced Secure Access Service Edge (SASE) is a new offering that combines comprehensive network access with network security services to create a unified cloud-delivered service model.

Wipro's SASE services are part of its Digital Network Services, which also include various solutions like Wipro Insightix™, Cognitive Digital Network Infrastructure (CoDNI), MDO, #WANFreedom and Cloud Trust Security framework, as well as solutions and products from partners.

GTT

GTT (Rising Star) offers GTT Secure Connect integrating SD-WAN and SSE to deliver a SASE framework. Through a comprehensive package of networking and layered security solutions from industry-leading partners, GTT provides next-generation protection.

© 2024 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

Star of Excellence

A program, designed by ISG, to collect client feedback about providers' success in demonstrating the highest standards of client service excellence and customer centricity.

Source: ISG Star of Excellence™ research program, Insights till May 2024

In the ISG Star of Excellence™ research on enterprise customer experience (CX), clients have given feedback about their experience with service providers for their **Network - Software-Defined** services.

Based on the direct feedback of enterprise clients, below are the key highlights:

Client Business Role

▲ **Most satisfied**
Sales/Marketing

▼ **Least satisfied**
Finance

Region

▲ **Most satisfied**
Australia/New Zealand

▼ **Least satisfied**
Central/South America

Industry

▲ **Most satisfied**
Retail

▼ **Least satisfied**
Chemicals

Industry Average CX Score

▲ Highest CX: 88.2
▼ Lowest CX: 51.2

CX Score: 100 most satisfied, 0 least satisfied
Total responses (N) = 269

Most Important CX Pillar

Execution and Delivery

Service Delivery Models	Avg % of Work Done
Onsite	53.1%
Nearshore	21.5%
Offshore	25.4%

© 2024 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

Appendix

Methodology & Team

The ISG Provider Lens 2024 – Network - Software Defined Solutions and Services study analyzes the relevant software vendors/service providers in the German market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

Study Sponsor:
Heiko Henkes

Lead Author:
Dr. Kenn Walters

Editors:
Shaurya Vineet & John Burnell

Research Analyst:
Deepika B

Data Analyst:
Sibasis Panigrahy

Consultant Advisors
Jon Harrod & John Lytle

Project Manager:
Shona Merin Jacob

Information Services Group Inc. is solely responsible for the content of this report. Unless otherwise cited, all content, including illustrations, research, conclusions, assertions and positions contained in this report were developed by, and are the sole property of, Information Services Group Inc.

The research and analysis presented in this report includes research 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. The data collected for this report represent information that ISG believes to be current as of June 2024 for providers that actively participated and for providers that did not. ISG recognizes that many mergers and acquisitions may have occurred since then, but this report does not reflect these changes.

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

The study was conducted in the following steps:

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

© 2024 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

Lead Author

Dr. Kenn D Walters
Distinguished Lead Analyst

Dr. Kenn Walters is a highly skilled senior executive with over 40 years of experience in directing and managing major transformational technology projects, research and development programs, aswell as extensive experience within providers and in global industry research and management consultancy. For ISG, Kenn has written over 100 articles as a distinguished lead analyst for ISG Insights in areas such as digital transformation, cloud managed networks, SD-networking, SDN and digital disruptors.

He and is a Distinguished lead analyst and author for multiple regions in the Provider Lens™ reports,in such areas as Networks – Software Defined Networking, Digital Business Software and Services, Contact Center as a service, and CC CX. He holds a BSc, MSc, and Ph.D. in computer science and communications systems.

Research Analyst

Deepika B
Senior Research Analyst

Deepika is a Senior Research Analyst at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on Cybersecurity - Services and solutions, Telecommunication, Media and Entertainment Services and Networking – Software defined Solutions and Services. She works closely with the Lead author from diverse regions in the research process. She also authors enterprise context and global summary reports. She has over 4 years of experience in the technology research industry and has carried out various client-facing ad-hoc projects across industries such as Automotive, BFSI, and Retail & Consumer Goods. Prior to this role, she was also accountable for maintaining a constant eye on the technology market and providing insightful quantitative and strategic analysis to clients through market sector reports.

© 2024 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

Study Sponsor

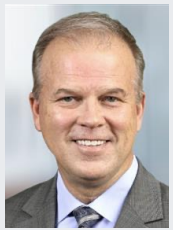
Heiko Henkes

Director & Principal Analyst, Global IPL Content Lead

Heiko Henkes serves as Director and Principal Analyst 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.

Henkes heads Star of Excellence, ISG's global customer experience initiative, steering program design and its integration with IPL and ISG's sourcing practice. 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/ISG Research

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.

© 2024 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

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 (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 900 clients, including more than 75 of the world's top 100 enterprises, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including AI and automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; strategy and operations design; change management; market intelligence and technology research and analysis.

Founded in 2006, and based in Stamford, Conn., ISG employs 1,600 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data.

For more information, visit isg-one.com.

© 2024 INFORMATION SERVICES GROUP, INC. ALL RIGHTS RESERVED.

ISG Provider Lens™

JULY, 2024

REPORT: NETWORK – SOFTWARE – DEFINED SOLUTIONS AND SERVICES

© 2024 Information Services Group, Inc.
All Rights Reserved