*ISG Provider Lens™

Network — Software Defined Solutions and Services

Edge Technologies and Services

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

HCLTech

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Executive Summary

Report Author: Avimanyu Basu

The U.K. witnesses a tectonic shift in the mindset of CISOs towards security-enabled networks.

The perception of networks being the foundation for digitalisation and the business requirements of enterprises is setting in. This digitalisation, in turn, will bolster the growth of the networks and the investments required by enterprises. As enterprises progress in executing their cloud strategies by moving workloads to the cloud, especially in multicloud environments, service providers tend to structure their offerings to help customers connect to and in between clouds. This has reinforced service providers' focus on the fixed connectivity portfolio. Furthermore, customer applications have been far more distributed in the last couple of years than they were earlier, and that is expected to continue in the short to medium term.

Most of service providers have ramped up their infrastructure footprint in the last 12 months by connecting with the appropriate cloud service providers for the relevant locations. Vodafone, for instance, has been establishing several new cloud connect data centres. It expanded its internet edge capabilities to help its customers connect to the cloud and get the desired performance from the cloud service provider. Because organizations may have several users across thousands of sites, the telcos in the U.K. adopted a strategic approach to ensure the quality of the end-user experience. Since the pandemic, many work sites have become residential homes as people are working remotely, making the UX a critical parameter in driving employee productivity and well-being. A shortcoming in application performance due to connectivity services leads to an impact on business productivity. Thus, UX has become one of the major parameters in driving boardroom discussions for enterprises. In response, telcos are working closely with several hyperscalers, such as Google Cloud and Microsoft to deliver guaranteed performance to the enterprise application services over

Enterprises tend to opt for **network as a service** or **network as a subscription models** as compared to large CapEx outlay.

the internet. Furthermore, telcos have formed partnerships with consulting firms as a step towards developing vertical expertise and bringing solutions to specific verticals.

ISG expects the concept of cloud-first networking to be instrumental in the next two to three years when the industry will use multicloud applications instead of multiple cloud applications. Multicloud applications can effectually get microservices running in different kinds of clouds whilst simultaneouslyretaining information in real time. Thus, inter-cloud connectivity will be the backbone of next-gen networks, and several service and solution providers are strategising how to make it a key differentiator in this space of cloud-native network investments. These providers have invested in their intent-based infrastructure as a value proposition to these offerings, representing their vision to deliver a more autonomous network that is highly automated and orchestrated, taking up several day-to-day tasks without intervention from engineers.

Agility requirement with multicloud and SaaS applications: These operations have moved beyond concept to commercialisation. The pandemic has been driving the use of cloud-based applications, enabling users to access the network and applications from anywhere. One of the most prominent use cases is the hybrid workplace. Such workspaces are expected to continue operating even in the post-pandemic times when customers and employees would continue accessing the network remotely.

Security is no longer an afterthought: Enterprises aspire to bring security boundary closer to users, workloads and things. Thus, using hybrid and remote working as a foundation is a move towards zero trust network access (ZTNA) and adopting cloud-based security services.

Technical debt and associated security risks: One of the major reasons behind the challenges enterprises face with their network is technical debt. Each enterprise carries a technical debt that may be attributed to its tendency to prioritise other investments over technical ones, leading to the accumulation

of technical debts, such as lag in the software subscription update. Many networks could not be grown during the pandemic due to a lack of available investment. Enterprises wanted to extract the best from the network to continue working remotely. On top of that, the supply chain shortages in the last 12 to 18 months have exacerbated technical debts because manufacturers have not been able to keep up with demand for networking equipment.. So, each enterprise presently has a lot of technical debt, which needs to be retired at the earliest because it adds inefficiencies, complexity and security-related risks to the network. However, 75 percent of organizations perceive cybercrime as an imminent and increasing threat, according to NTT, and 50 percent believe they already invest in network security measures to manage these risks.

Integration of AIOps and ChatOps-enabled functionalities: Whilst there has been significant work on the AIOps front in networks, and several pilots have taken place, adoption at scale is still minimal. Service providers and system integrators have expressed their interest in working with enterprises to scale

these technologies. However, ISG has found instances where service providers have provided enterprises with automation- and AIOps-driven services that are anchored by the Zero Trust security framework and guided by service intelligence that improves network performance through real-time analysis. Microland, for example, has developed the Intelligeni platform, which has in-built AIOps and ChatOps capabilities that give it a self-healing network architecture. It also has features, such as AI-based anomaly detection, knowledge graphs-based dependency mapping, observability and performance dashboards.

Lack of visibility: This has become a critical pain point for enterprises. Most of them do not have full visibility of their estates because some may have very old legacy infrastructure, whilst some may be new. Service providers tend to work on giving them the required visibility of that inventory and the architecture because it helps begin work on digitisation.

Executive Summary

Limited use of predictive analytics: There are still a lot of reactive approaches to operations, and service providers are working with enterprises to bring proactive solutions. We observe extensive use of AI for network functions. AI is often used for incident management, which involves clustering and correlation. So, in case of a stream of events from a network, AI engines can cluster and group the events based on their order and the likely root cause.

> Increasingly, enterprises are picking the best solution for a particular use case and then integrating it into an end-to-end proposition.

Provider Positioning

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	Managed SD-WAN	SDN Transformation Services (Consulting and Implementation)	Enterprise Networks Technology and Service Suppliers	Edge Technologies and Services	SASE Solutions and Service
Accenture	Not In	Leader	Not In	Market Challenger	Leader
Apcela	Not In	Not In	Not In	Product Challenger	Not In
AT&T	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Atos	Contender	Not In	Not In	Not In	Not In
Blaze Networks	Market Challenger	Contender	Not In	Not In	Not In
BT	Leader	Leader	Leader	Leader	Leader
Capgemini	Not In	Contender	Not In	Contender	Not In
Cato Networks	Not In	Product Challenger	Product Challenger	Product Challenger	Product Challenger
CDW	Not In	Not In	Not In	Not In	Contender
Claranet	Market Challenger	Not In	Not In	Not In	Not In

Provider Positioning

	Managed SD-WAN	SDN Transformation Services (Consulting and Implementation)	Enterprise Networks Technology and Service Suppliers	Edge Technologies and Services	SASE Solutions and Service
Cognizant	Not In	Not In	Not In	Contender	Not In
Colt	Leader	Leader	Leader	Not In	Leader
Comcast Business	Product Challenger	Product Challenger	Product Challenger	Not In	Product Challenger
Computacenter	Product Challenger	Market Challenger	Product Challenger	Not In	Product Challenger
Cyient	Not In	Contender	Not In	Not In	Not In
Deutsche Telekom	Leader	Product Challenger	Leader	Leader	Leader
DXC Technology	Product Challenger	Rising Star ★	Not In	Product Challenger	Rising Star ★
Evolving Networks	Contender	Contender	Contender	Not In	Not In
Expereo (Breeze Networks)	Market Challenger	Market Challenger	Not In	Not In	Market Challenger
Extreme Networks	Not In	Product Challenger	Product Challenger	Product Challenger	Product Challenger

Provider Positioning

	Managed SD-WAN	SDN Transformation Services (Consulting and Implementation)	Enterprise Networks Technology and Service Suppliers	Edge Technologies and Services	SASE Solutions and Service
Fujitsu	Product Challenger	Not In	Not In	Not In	Product Challenger
Globalgig	Not In	Not In	Contender	Not In	Contender
GTT	Product Challenger	Product Challenger	Product Challenger	Not In	Product Challenger
HCLTech	Leader	Leader	Leader	Leader	Leader
hSo	Contender	Not In	Not In	Not In	Not In
Infosys	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Intuitive Systems and Networks (ISN)	Not In	Contender	Not In	Not In	Not In
Kyndryl	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Market Challenger
Logicalis	Rising Star ★	Product Challenger	Not In	Not In	Not In
LTTS	Not In	Contender	Not In	Contender	Not In

Provider Positioning

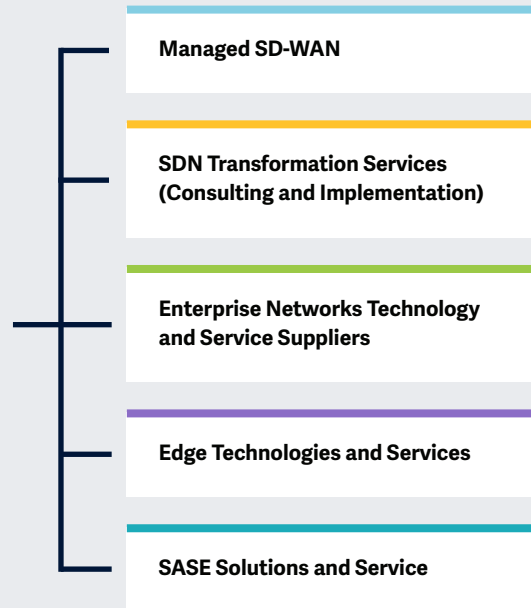|	Managed SD-WAN	SDN Transformation Services (Consulting and Implementation)	Enterprise Networks Technology and Service Suppliers	Edge Technologies and Services	SASE Solutions and Service
Lumen	Product Challenger	Product Challenger	Product Challenger	Leader	Product Challenger
Microland	Leader	Leader	Rising Star ★	Rising Star ★	Product Challenger
Mphasis	Product Challenger	Product Challenger	Not In	Not In	Not In
Nomios	Market Challenger	Market Challenger	Not In	Not In	Not In
NTT	Leader	Product Challenger	Not In	Not In	Leader
Orange Business	Leader	Leader	Leader	Leader	Leader
Prodapt	Contender	Product Challenger	Not In	Not In	Not In
Redcentric	Not In	Not In	Market Challenger	Not In	Not In
Sify Technologies	Not In	Not In	Not In	Not In	Product Challenger
Stream Networks	Market Challenger	Market Challenger	Market Challenger	Not In	Not In

Provider Positioning

	Managed SD-WAN	SDN Transformation Services (Consulting and Implementation)	Enterprise Networks Technology and Service Suppliers	Edge Technologies and Services	SASE Solutions and Service
Tata Communications	Leader	Leader	Product Challenger	Not In	Leader
TCS	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Tech Mahindra	Leader	Leader	Leader	Leader	Leader
Verizon	Leader	Product Challenger	Product Challenger	Product Challenger	Product Challenger
VMO2B	Leader	Leader	Not In	Market Challenger	Leader
Vodafone	Leader	Leader	Leader	Leader	Leader
Wipro	Leader	Leader	Leader	Leader	Leader

Analysis of **Enterprise Networks Solutions and Services 2023.**

Simplified Illustration Source: ISG 2023

- Managed SD-WAN
- SDN Transformation Services (Consulting and Implementation)
- Enterprise Networks Technology and Service Suppliers
- Edge Technologies and Services
- SASE Solutions and Service

Definition

This ISG Provider Lens™ study, Network – Software-Defined Solutions and Services 2023, examines various global network offerings related to enterprise networks and software-defined networking. These include software-defined wide area networks (SD-WAN), comprising managed SD-WAN services, consulting and advisory and implementation support. Enterprise networks technology and services supply — concentrating on providers of all network-related technology and services that enterprises implement and operate (including full and partial SD-WAN solutions) — covers all areas from the network core to edge-branch technology and services. 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 those delivered through mobile and 4G/5G technologies and the service offerings related to these segments. In addition, the study examines secure access service edge (SASE), which is an overarching, secure and fully integrated network environment for businesses.

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.

Scope of the Report

In this ISG Provider Lens™ quadrant report, ISG covers the following five quadrants for services/solutions: Managed SD-WAN, SDN Transformation Services (Consulting & Implementation), Enterprise Networks Technology and Service Suppliers, Edge Technologies and Services, SASE Solutions and Services.

This ISG Provider Lens™ study offers ICT decision-makers with the following:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments (quadrants)
- Focus on the U.K. market

Our study serves as the basis for important decision-making in terms of positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their existing 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).

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.

★ **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.

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.

Edge Technologies
and Services

Who Should Read This Section

This report is relevant to enterprises across all industries in the UK for evaluating providers that deliver technologies and services into the highly important network edge space. These offerings cover hardware and software, management or reporting tools and applications, and other services associated with the network edge.

In this quadrant report, ISG lays out the current market positioning of edge technology and service providers in the UK

Automation and orchestration have brought a lot of proactive attributes to the network. However, with expectations rising on the business performance front, multicloud and edge are becoming more important, especially in large facilities with business criticality. Redundancy and adaptability, thus take the centre stage enabling businesses to protect their operations and respond quickly. The SLAs therefore demand response in minutes or seconds and the performance is attributed

to user experience and cycle time. This may or may not be across the enterprise , but certainly across critical operations.

The telemetry data and bringing that into a data lake, thus becomes critical. Similarly, understanding the observability, entrenching it into a knowledge graph that represents the health of an application, and finding the anomalies that will disturb the health of an application become important. The enterprises would need to use Net DevOps as a full network CI/CD to respond with an automated resolution. Moreover, they are connecting physical assets – that used to be standalone – to the network , enabling data collection from the sensors and porting the data into a data lake, finding the inefficiencies and feeding that back into the asset to tune the performance. This , on the contrary, increases the surface area of attack. Assets are seldom designed from a security perspective to be on a network. Thus, it becomes a challenge to the security posture.

IT and network management leaders involved in strategy, architecture, operations and procurement should read this report to understand providers' relative positioning and capabilities.

Cybersecurity leaders should read this report to understand providers' security capabilities in mobile network service delivery, which provides better visibility into the service providers' security approach.
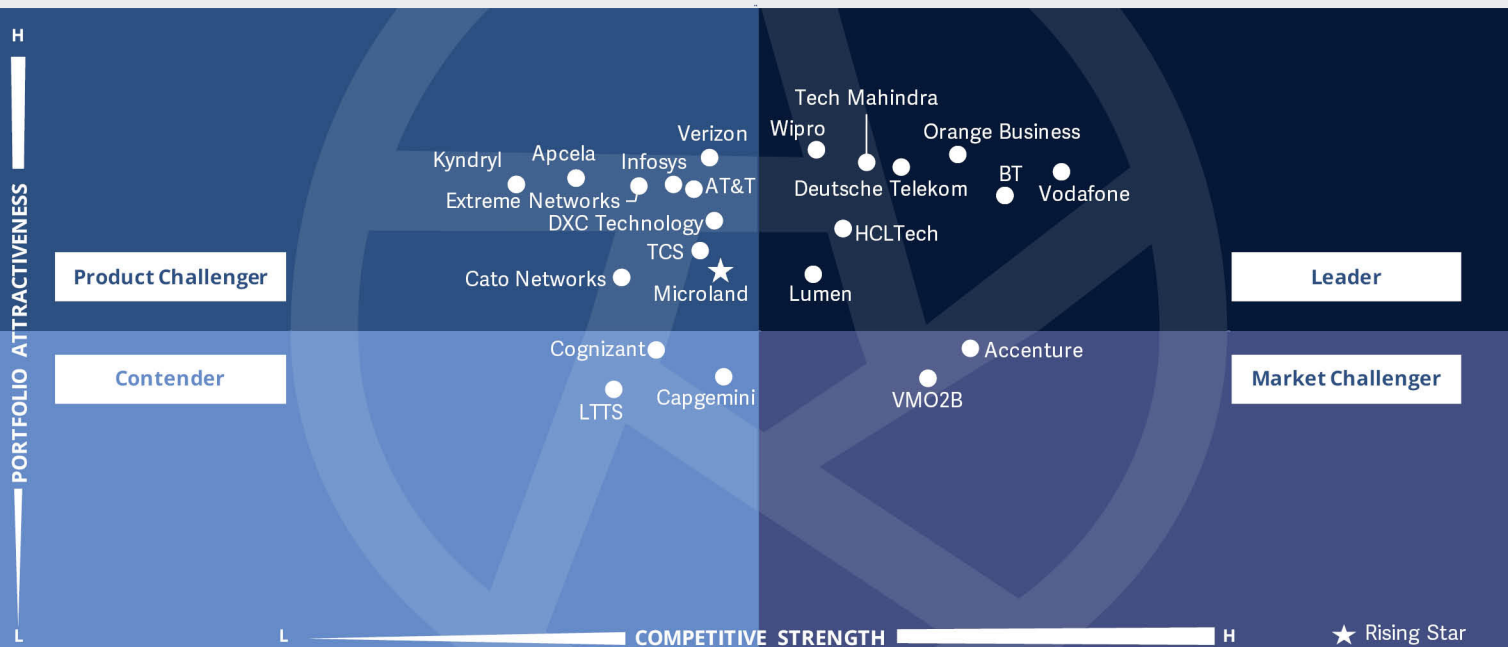
Digital transformation leaders should read this report to understand how mobile network service providers fit their digital transformation strategy and effectually leverage their partnership ecosystem.

IT and network management leaders involved in strategy, architecture, operations and procurement can understand providers' relative positioning and capabilities, driving effective consumption of services.

ISG Provider Lens™
Source: ISG RESEARCH

Network - Software Defined Solutions and Services
Edge Technologies and Services

U.K. 2023

PORTFOLIO ATTRACTIVENESS

H

Tech Mahindra
Wipro   Orange Business
Verizon
Kyndryl   Apcela   Infosys   BT
                  AT&T   Deutsche Telekom   Vodafone
Extreme Networks
DXC Technology
                  HCLTech
TCS
Cato Networks   ★
Microland
                  Lumen

Product Challenger   **Leader**

Cognizant   Accenture

Contender   **Market Challenger**

         LTTS   Capgemini   VMO2B

L

L   **COMPETITIVE STRENGTH**   H   ★ Rising Star

This quadrant analyses providers delivering **hardware and software services and solutions**, including **management and monitoring tools, applications** and full services specifically for the **network edge**, for enterprise networks across multiple verticals.

Avimanyu Basu

Edge Technologies and Services

Definition

This quadrant analyses vendors that deliver technologies across hardware and software, management or reporting tools, and applications and services associated with edge network technology to enterprises.

Edge technologies, services and computing are current trends in IoT and IIoT. With the localised processing of data, security and privacy have 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, analysed on the network, and then transferred to the central data centre or cloud. As the number of connected devices has increased exponentially, the volume of data generated is multifold. Thus, interim processing is required to ensure cost reduction and increased efficiency. This, in turn, places high importance on efficient and software-driven edge capability networks and connectivity capabilities.

Edge components can be managed in the same manner as core and SD-WAN components. Software-defined capabilities include 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 both wireless (SD-WLAN) and mobile (SD-WMLAN), as well as IoT or IIoT sensors and devices or control/security devices.

Eligibility Criteria

1. Product portfolio coverage, focus areas, and **completeness of modular or area solutions**, together with integration into broader solutions

2. Ability to **deliver requisite training** and education to clients with PoC or studio

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 PoC, pilot deployments or commercial deployments

6. Competitiveness of offerings and **types of commercial terms**

Observations

With a rise in the adoption of IoT networks, enterprise clients are seeking end-to-end connectivity to analyse data at the edge. Accordingly, service providers and system integrators are exploring ways to enhance their capabilities through Wi-Fi 6, long-term evolution (LTE) or 5G networks. They are also readying their customers for bigger public 5G rollouts, wherein bandwidths and frequencies would be allocated in a certain spectrum chunk for enterprises. These technologies are expected to pave the way for scaling Industrial IoT (IIoT) and the growth of edge computing. To support this, a more inclusive cloud ecosystem is required. Cloud models, which were predominantly storage- or application-related concepts in the past, have evolved into a holistic web of technologies on the network side, with components of SDN such as WAN, LAN and Wi-Fi 6 management.

In this year's study, this quadrant is represented only by service providers and system integrators, as they are visible more prominently in the market, even though a number of OEMs and other technology vendors have dedicated edge technology divisions. This quadrant's Rising Star remains the same this year.

From the 74 companies assessed for this study, 23 have qualified for this quadrant, with eight being Leaders and one a Rising Star.

BT

BT's strategy to increase edge capabilities involves enhancing efficiency and agility in operations through the deployment of advanced technologies, such as AI and ML; this helps it identify the roadblocks that restrict use cases.

Deutsche Telekom's engineering dexterity enables it to integrate the edge cloud ecosystems of hyperscalers. The company's enterprise clients benefit from a holistic ecosystem consisting of connectivity, edge cloud and digital solutions.

HCLTech

HCLTech offers edge technologies and services through a combination of its proprietary frameworks and platforms, such as Nucleus, a wired/wireless campus networking solution, integrated with white-labelled OEM solutions.

Lumen has introduced its innovative Edge Gateway-as-a-service model, which enables the company to sell uCPE as a platform for the management of customer-provided and managed networks, security and IT applications.

Its inherent connectivity capabilities enable **Orange Business** to deploy various edge technologies in customer environments. The technologies offered include uCPE, software-defined mobile networks (SDMNs), SD-LAN, IoT and IIoT.

Tech Mahindra's Enterprise Network as a Service (around SD-WAN and uCPE) and 5G for Enterprise (or 5G4E; industry-based packages and mobile-network-based packages) promise holistic coverage for enterprise requirements.

Vodafone

A robust software-defined everything (SDx) portfolio driven by significant global investments in networking and internet edge capabilities has enabled **Vodafone** to strengthen its position in the market.

Wipro's investments in technology innovations have enabled it to create a plethora of reference architectures and accelerators that support clients' use cases in a reliable and secure manner.

Edge Technologies and Services

Microland (Rising Star) provides comprehensive implementation support to its remote and onsite teams. Its partner ecosystem helps it deliver onsite services; together with partners' and clients' IT/OT teams, it ensures end-to-end delivery of solutions.

HCLTech

Leader

"HCL's network proficiency dovetails perfectly with its product engineering capabilities to enable customers with top-notch solutions and services."

Avimanyu Basu

Overview

HCLTech, based in Noida, India, offers edge technologies and services through a combination of its proprietary frameworks and platforms, such as Nucleus, a wired/wireless campus networking solution, integrated with white-labelled OEM solutions. HCLTech's partnerships with leading OEMs and promising startups deliver a robust road map for customers' digital ambitions concerning networks, covering features and product development. HCLTech's SD-access network capabilities help customers with joint go-to-market propositions and access to a pool of resources that have proficiency in diverse technology areas.

Strengths

Bolstering hyperscaler partnerships to fortify edge capabilities: HCLTech's edge networking capabilities are reinforced by the adoption of Intel Smart Edge and edge solutions from hyperscalers. This results in lower latency and brings insights and actions closer to the source of data. HCLTech's investments in edge computing, MEC and 5G through its CoLLAB enable it to co-create the value proposition with its clients.

Access point (AP) management and SD-access dexterity: HCLTech's SMARTWiFi platform enables bulk configuration of several APs simultaneously, using templates and zero-touch provisioning to minimise the time needed for provisioning and installation. Connecting all APs in the deployment location with a centralised controller also improves network optimisation by comparing and analyzing the coverage patterns and behaviour. HCLTech's SD-access network capabilities help customers with joint go-to-market propositions and access to a pool of staff that have proficiency in diverse technology areas.

Multidimensional offerings powering the enterprise edge: HCLTech uses different industry-leading solutions, such as HPE Aruba Mobile-First Campus Solution, Arista Cognitive Campus and Cisco DNA (with consultation), to provide the necessary guidance and support to enterprises that want to make their edge more flexible and robust.

Caution

Most of the customer success stories in the SDx domain are concentrated across two or three specific verticals i.e. retail and CPG, healthcare and manufacturing. Most of it's competitors in the region have showcased multiple success stories in a wide range of verticals.

Appendix

Methodology & Team

The ISG Provider Lens™ 2023 – Network – Software Defined Solutions and Services research study analyzes the relevant software vendors/service providers in the U.K. 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 report includes research from the ISG Provider Lens program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of March 2023, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

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

Lead Author

Avimanyu Basu
Distinguished Lead Analyst

Avimanyu Basu brings over 10 years of extensive research experience to handle telecommunication and engineering and R&D services specific research deliverables for the program called ISG Provider Lens™ that is designed to deliver research on service provider intelligence. He is responsible for authoring reports on software defined networks and network function virtualisation (SDN/NFV) and engineering services. He is also responsible for key vertical-oriented reports and thought leadership papers for manufacturing along with whitepapers revolving around specialized technologies showcased by different cross-section of enterprises.

IPL Product Owner

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

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

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

ISG Provider Lens™

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

For more information about ISG Provider Lens™ research, please visit this webpage.

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ISG

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Founded in 2006, and based in Stamford, Conn., ISG employs more than 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.

ISG Provider Lens™

JUNE, 2023

REPORT: NETWORK — SOFTWARE DEFINED SOLUTIONS AND SERVICES