

# Network — Software Defined Solutions and Services

SASE Solutions and Service

A research report comparing provider strengths,  
challenges and competitive differentiators

Customized report courtesy of:

**HCLTech**



Executive Summary

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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 simultaneously retaining 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

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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
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

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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
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

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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
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

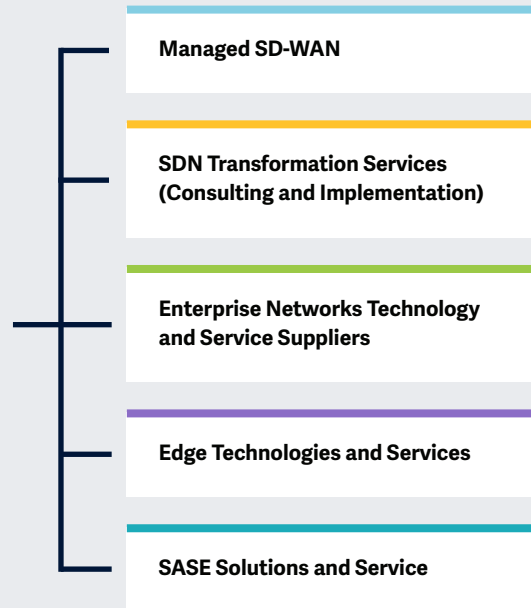
Page 5 of 5

	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



## 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 (exceptions are possible).





### Provider Classifications: Quadrant Key

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

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

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

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

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

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





# SASE Solutions and Service

### Who Should Read This Section

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

In this quadrant report, ISG lays out the current market positioning of SASE service providers in the UK and how they address the key challenges enterprises face in the region.

Enterprises are moving away from SD-WAN as a siloed product and opting for SD-WAN bundled with security elements instead. The conversation is mostly around a joint secure network transformation. Furthermore, the multicloud topology tends to gain prominence from a use-case perspective. A number of multicloud opportunities are emerging driven by factors, such as private applications in the enterprise cloud and connecting different applications with solutions from the service providers.

The enterprises were concerned about protecting the users accessing the Internet, which pushed the adoption of SASE.

The SASE requirements are currently going granular, and customers are looking at components such as CASB, which aligns with multicloud policies. The enterprises are also looking at options for DLP, DNS and reverse DNS. A few customers have already deployed some of these SSE solutions and are considering transforming their WAN edge. Enterprise customers often use a client to encrypt the traffic towards the cloud but could not get the necessary visibility into the traffic for SD-WAN. Service providers are helping such customers with the approach of acquiring a specific module of SASE in an integrated manner.



**IT and network management leaders** should read this report to understand providers' capabilities around SASE services and their technical and integration capabilities and partnerships.



**Digital transformation professionals** should read this report to understand how providers of SASE services fit their digital transformation initiatives and how they compare to one another.



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



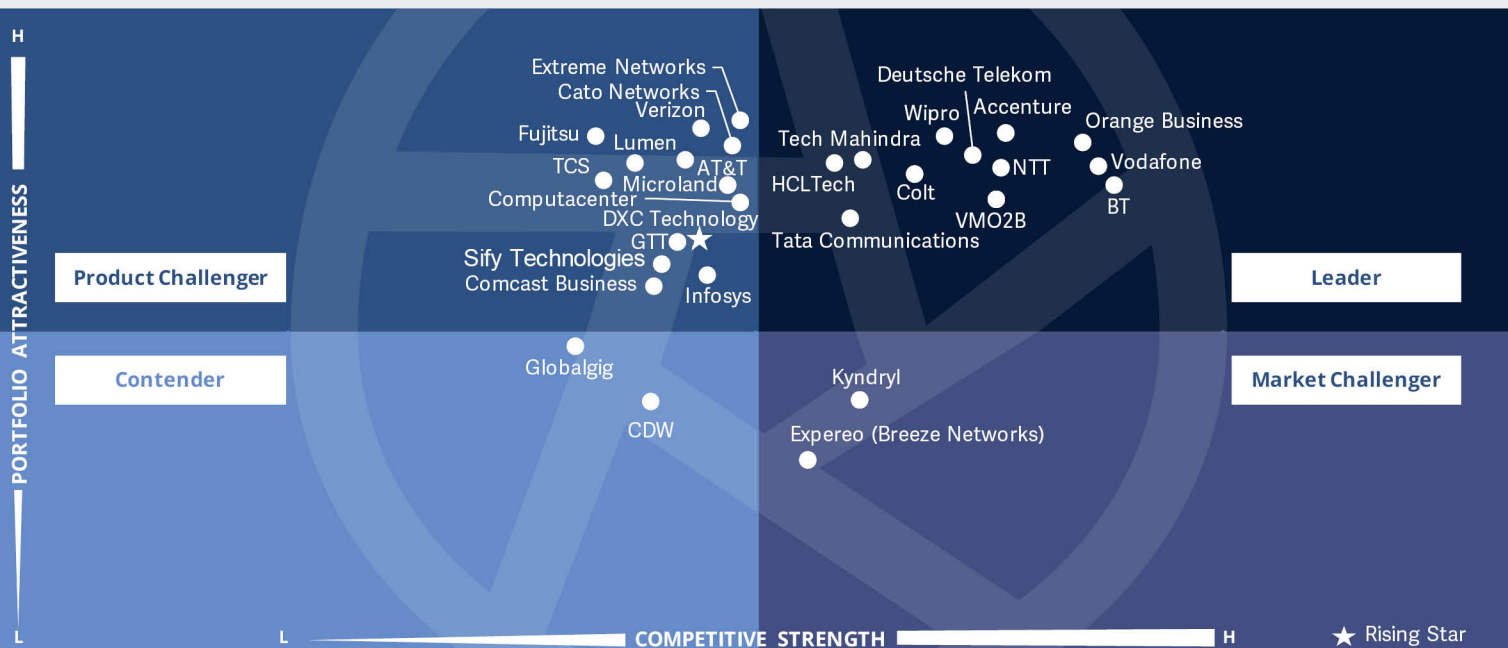
**Procurement professionals** should read this report to acclimatise with SASE service suppliers, especially around new pay-as-you-consumption options instead of traditional models.



**\*ISG Provider Lens™**  
**Network - Software Defined Solutions and Services**  
**SASE Solutions and Services**

Source: ISG RESEARCH

U.K. 2023



This quadrant analyses providers of **SASE solutions and services as packaged, integrated networks and security solutions**, covering everything **from core to edge**. These SASE solutions should fully integrate with existing enterprise business systems as required.

Avimanyu Basu





## SASE Solutions and Service

### Definition

This quadrant analyses secure access service edge (SASE) solutions and services offered to enterprises as overarching integrated networks and security solutions from the enterprise core to the edge. These include solutions moving into pilots and solutions currently commercially deployed into production.

Enterprises increasingly focus on migrating their ICT and network operations to the cloud whilst enhancing security in all touchpoints. Software-defined networks have proven to be efficient in assisting 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. 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 (FaaS), zero-trust network access (ZTNA) and secure web gateways (SWG). These encompass secure and integrated access from the data centre (which may include network function virtualisation [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, supplying complete PoC, 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 centre 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 just rip and replace
4. Ability to deliver training and **provide both PoC or studio simulations and testing** for clients
5. **Industry-specific knowledge** and experience mapped to the client type
6. Scope of partnerships and offerings plus management capability for the needed **orchestration within a customer project**
7. **Reference customers or solutions** in pilot moving into commercial deployment
8. **Competitiveness of offerings** and types of commercial terms



### Observations

An SD enterprise is gradually becoming the foundation of B2B businesses, and networks are no longer monolithic. Accordingly, network orchestration has taken centre stage. Different access technologies offered by classical telecommunication firms, Internet vendors, 5G providers and satellite communication providers revolve around network orchestration. As the telecommunication industry focuses on automation and orchestration, the Internet tends to play a much more relevant role, which revolves around networking and global connectivity. Because the global Internet infrastructure has already been established there is no longer a need for dedicated lines with respect to appropriate SLAs.

Furthermore, this market strongly focuses on security. There has been a strong push across the telecommunication industry to embed security services into the network fabric and associated network services instead of keeping security as a separate function. Architectures such as SASE and zero-trust network access (ZTNA) have gradually emerged

from the whiteboard in the last few years and have reached the stage of being rolled out by technology providers. This, in turn, is resulting in a positive consolidation in the market. With the simplification of convergence in the services and technology space, system integrators are looking to further enhance their service offerings.

The Leaders are almost consistent with last year; however, some players have been moved out of the quadrant altogether due to their low visibility in the market. The analyst has identified a new Rising Star, whilst the competitive positioning of the previous Rising Star has improved.

From the 74 companies assessed for this study, 30 have qualified for this quadrant, with 12 being Leaders and one a Rising Star.



**Accenture's** Cloud First Networks dovetails three major value propositions, Cloud Networks, Critical Networks and Communication Networks, that span an enterprise's end-to-end network modernisation ecosystem. Security is an important component of these propositions.

### BT

**BT** combines its network underlay experience and SD-WAN capabilities with its network and cloud-based security capabilities. Consistently, its network orchestration platforms enable provisioning and change through a single policy, control and event data framework.



On the WAN and SASE sides, **Colt** provides relevant services such as secure web gateways, FwaaS, CASB and ZTNA, which are delivered through its self-service SD-WAN portal.



**Deutsche Telekom** has been designing its Magenta SASE approach, which features direct integration into its Edge Compute Service Nodes based on its Tier 1 backbone (AS3320), directed towards achieving performance improvements for customers.

### HCLTech

**HCLTech's** SASE offering is cloud-delivered, which integrates with its Fusion Platform to enhance UX, eliminate the roadblocks due to legacy technologies and improve brand security and visibility at the application level.



## SASE Solutions and Service



**NTT** enables a resilient security posture to protect assets against dynamic security threats with SASE services. By monitoring the network, endpoints, and public or hybrid cloud environments, NTT presents a complete view of customers' security posture.



**Orange Business** has defined a clear road map for its SASE ambitions in 2022, which revolves around deeper SASE integration with its Telco Cloud platform; the FortiSASE integration; and the integration of Palo Alto Prisma Access, Prisma SD-WAN and Cisco Umbrella.



**Tata Communications'** GSIGS 2.0 version delivers a network-agnostic solution with advanced threat protection, presenting an all-in-one unified coverage without investing in in-house equipment.



**Tech Mahindra's** implementation services around SASE and SD-WAN include consulting, transport productisation for telecommunication companies, and assessment and business case development services.

### Virgin Media O2 Business

**Virgin Media O2 Business'** SD vision intertwines with its SASE approach, which revolves around providing the best UX and agility to customers. The company has been working towards delivering its services and solutions in an OTT-like model, which is not restricted by the underlay.

### Vodafone

**Vodafone's** Super PoPs consist of a few physical components, and these are gradually becoming virtualised to support new-age offerings such as SASE. Consistently, the company will use virtualisation services from carrier-neutral facilities (CNFs) offered by providers including Equinix and Digital Realty.



**Wipro's** proficiency in providing secure access, using an agent or web access and leveraging APIs for new applications, creates the differentiation.



**DXC Technology** (Rising Star), on the SASE front, is working towards integrating Cisco Umbrella, which will also encompass private wireless.



# HCLTech



Leader

“HCLTech has an extensive partner ecosystem that enables SASE-based zero-trust, secure and high-performance routing of traffic directly to the Internet from branch sites.”

*Avimanyu Basu*

## Overview

HCLTech provides Managed SASE offering in the form of cloud security as a service, which is based on a cloud-delivered platform. It integrates seamlessly with HCLTech's Fusion Platform to provide a heightened UX, simplified operations, economic viability associated with legacy technologies, discrete application & data visibility and brand security. HCLTech focuses on a phase-wise SASE adoption roadmap to ensure a seamless and successful deployment. HCLTech solution is a SaaS-based platform, which is integrable with all the major hyperscalers to enable SASE based network security architecture for an enterprise having a hybrid/ pure public cloud/ multi-cloud environment, accommodating all cloud strategies.

## Strengths

### **Single SaaS platform bringing network services edge and network security services edge together:**

HCLTech's Managed SASE services include functions such as SD-WAN, FWaaS, Secure Web Gateway, ZTNA, Remote Browser Isolation, CASB and DLP, on top of which network & network security policies are enforced. This percolates to all kinds of workforces, including enterprise workers accessing the network from headquarters or branches, or remote locations as well as third parties/ partners accessing specific applications. The platform provides secure access to external or internal applications hosted in the cloud environment or on-premises, as well as B2B and B2C applications. Complete management of the SASE platform and the threat investigation and management are done by HCLTech.

Through HCLTech Managed SASE platform, zero-trust based access is provided for all enterprise applications, which helps customers secure their critical data from any unauthorized access. On top of that, improved UX is also an added benefit.

### **The bottom-up approach to remove latency and reduce CapEx and OpEx:**

HCLTech simplifies customers' network architecture by removing legacy solutions, which sends the egress traffic to the cloud gateway and SD-WAN and then consolidates security elements at large locations and branches. Such simplification enables the cloud platform to provide users with secure access to applications irrespective of where they are hosted (cloud or on-premises).

## Caution

HCL portrayed a 8% YoY decline in total contract value, as compared to FY2022, which can be attributed to decreased IT spend by enterprises and recessionary headwinds.





# Appendix

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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Ankur Taneja

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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



## Author & Editor Biographies

*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](#).

### iSG Research™

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