ISG Provider Lens™

Network – Software-Defined Solutions and Services

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

Customized report courtesy of:

orange Business

QUADRANT REPORT | JUNE 2025 | U.S.

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SD-networks are synonymous with advanced, secure cloud-enabled enterprise networks across all industries

In the realm of enterprise software-defined networking (SD-networking) solutions and services, organizations face a rapidly evolving landscape shaped by various strategic factors, including the emergence of new technologies, business imperatives and organizational processes. These factors are intricately aligned with global trends, such as enterprise digitalization, business transformation, the need for enhanced security and the growing momentum toward cloudification. This study, conducted by the ISG Provider Lens™, focuses specifically on SD-networking within the U.S. market. It encompasses a broad spectrum of services and technologies, including managed SD-WAN, transformation services (consulting and advisory), edge technologies (including private enterprise 5G) and secure access service edge (SASE).

Leadership of U.S. in the global SD-WAN market

The U.S. is the largest national consumer of SD-WAN solutions globally. Reports from bodies such as the Global System for Mobile Communications Association (GSMA) indicate that U.S. accounts for more than 35 percent of the global market for SD-WAN capabilities, solutions and services. As a result, U.S. service providers play a pivotal role in shaping the global SD-WAN landscape, both in terms of technological innovation and the number of implementations at scale, helping shape market trends. The market growth in the U.S. is driven by highly advanced offerings from system integrators (SIs) and network providers, offering attractive consumption models, many based on the as-a-service *model*. The ongoing shift among SMEs looking to transition from rigid legacy infrastructures adds to the overall near-ubiquitous implementation of SD-WAN within larger enterprises. This shift aligns with global trends in digitalization and multicloud adoption, which continue to gain traction across almost all industry verticals and cross-industry offerings. Enterprises of all

SD-networks are **integral** to enterprises' **network functionality and security** needs.

sizes are increasingly seeking cost-efficient, flexible and secure solutions to enhance their competitiveness, ensure business continuity and improve CX, while also aiming to retain the staff essential for continued efficient network operation. SD-WAN technology with cloud aspects, coupled with innovations such as edge computing, private 5G networks and advanced security features, will continue to reinforce the dominant position of the U.S. in the global SD-WAN market through 2025.

The U.S. market has embraced SD-WAN as a critical enabler for enterprise transformation in the modern digital age. The ability to implement SD-WAN as an overlay on existing hardware and infrastructure provides enterprises with a phased approach to upgrading their networks without the need for a complete overhaul. This phased implementation model allows organizations to enhance their networks gradually, optimizing performance and scalability over time. Alternatively, SD-WAN can be implemented rapidly as a replacement to existing networks in a more *rip-and-replace* approach, with functionality and business SLAs tested against existing networks before the switchover to the new overlay network.

One of the notable features of SD-WAN is its ability to manage diverse network connections, including direct internet access and multiprotocol label switching (MPLS) underlays. This flexibility is particularly valuable for enterprises undertaking cloud migrations, as SD-WAN simplifies and accelerates moving to cloud. By offering seamless cloud on-ramp capabilities, SD-WAN is positioned as a foundational component of cloudification strategies within enterprise networks. As SD-WAN solutions evolve, many enterprises are incorporating them into broader SASE frameworks. This convergence of networking and advanced security is reshaping enterprise IT strategies, with SD-WAN paired with Security Service Edge (SSE) emerging as a high-growth segment in the managed network services marketplace.

Several key factors are accelerating the transformation of enterprise networks in the U.S. as we move into 2025.

Evolving into a business-responsive and flexible network while simplifying operations

One of the primary goals for enterprises today is enhancing network flexibility to support business needs while simplifying operational management. SD-WAN, particularly when delivered as a service (aaS), provides enterprises with a solution that supports real-time monitoring and management via a centralized, cloud-based control plane. This approach allows for the streamlined addition of network resources and applications, minimizing the need for physical hardware upgrades and significantly reducing complexity.

A key advantage of SD-WAN is the ability to manage networks through a single management interface. This centralization of control simplifies network management and enables enterprises to leverage automation, orchestration and policy-driven network configurations, allowing integration with many existing or new third-party enterprise IT services. By automating network operations, SD-WAN allows businesses to quickly adapt to changing needs and optimize network performance, making it a cornerstone of modern enterprise IT strategies.

Reducing risks in cloud and multicloud migrations and evolutions

As enterprises increasingly migrate their ICT and network operations to the cloud or evolve existing cloud strategies to new ones, mitigating complexity and reducing risks are critical considerations. SD-networking plays a vital role in facilitating seamless and secure cloud migrations, whether to a single cloud or multicloud environment. By leveraging SD-networking capabilities, enterprises can ensure smooth transitions with minimal disruption to operations, while maintaining comprehensive visibility and control over their network from core to edge.

The ability of SD-networking to support multicloud environments while reducing complexity is one of the key reasons behind its continued growth and adoption. As organizations continue to embrace cloud-native technologies, SD-networking provides the necessary infrastructure to ensure that

data and applications flow securely and efficiently across various cloud platforms.

Strengthening network and enterprise security

In today's risky digital landscape, network security is a top priority for businesses across all industries. Enterprises are increasingly demanding integrated security solutions that span their entire network infrastructure, from on-premises to cloud, and connect to all other IT security capabilities where feasible to provide a fully integrated and secure attack surface. SD-networking provides a secure foundation for enterprise networks by supporting robust security measures such as encryption, access control and threat intelligence.

The flexibility of SD-WAN ensured its position as the ideal platform for deployment within full SASE solutions. SASE combines SD-WAN with cloud-based security services, including firewalls, secure web gateways and zero trust network access (ZTNA), to protect the network perimeter and secure data transmission. If preferred by enterprises, SD-WAN may be adopted and augmented with SSE, allowing enterprises to achieve comprehensive security without compromising on performance.

Accelerating adoption among SMEs

The adoption of SD-networking is also rising among SMEs in the U.S. Many SMEs are focused on affordable, cloud-based solutions that support distributed workforces and/or premises (such as within the retail sector), which simplify network management and lower costs while increasing security. SD-networking provides SMEs with an efficient means to access robust network and security services without the need for substantial upfront investments in hardware. Major suppliers offer SME-specific solutions through SIs or providers, both at national and local levels. SD-WAN is particularly attractive due to its scalability and consumption-based pricing models, allowing SMEs to achieve enhanced security, performance and connectivity while minimizing operational overhead and capital expenditures.

Supporting innovation with advanced technologies

The ongoing digital business transformation of enterprises, combined with the rapid advancement of technologies such as AI, generative AI (GenAI), ML, automation and intent-based networks, is driving the need for flexible and adaptable network architectures. SD-networking provides the foundational capabilities required to support these technologies by offering enhanced network visibility, real-time management and automation. Consuming these SD-networking offerings as managed services from the provider reduces the overhead and complexities of staff training, as well as overheads associated with the ongoing updates or renewal of software or solution versions. For enterprises looking to leverage innovations such as intelligent edge computing, self-healing networks and 5G connectivity, SD-networking offers a scalable and secure solution that can integrate seamlessly with these next-generation technologies. By fully utilizing SD-networking in a managed or comanaged service model, organizations can unlock the full potential of these advanced technologies, enabling them to remain competitive and agile in an increasingly competitive and risky digital world.

In summary

The evolving landscape of SD-networking in the U.S. market is driven by a combination of technological advancements, changing business needs and the ongoing digital business transformation of enterprises. SD-WAN, along with complementary solutions such as SASE, SSE and SD-LAN is playing a crucial role in helping businesses navigate the complexities of modern and next-generation networking. As organizations continue to embrace cloud and multicloud environments, SD-networking is foundational in providing the flexibility, security and scalability required to meet the demands of today's digital-first world.

This study highlights the significant role that SD-networking solutions are playing in reshaping enterprise ICT infrastructures, driving innovation and enabling organizations to measurably achieve their strategic objectives. As the U.S. remains a leader in the global SD-networking market, it will continue to help shape the future of enterprise networking, with advancements in AI, GenAI, automation and edge computing further enhancing the capabilities of SD-networking solutions.

Executive Summary

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

Provider Positioning

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

Provider Positioning

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	Managed SD-WAN Services	SD-Networks Transformation Services (Consulting and Implementation)	Edge Technologies and Services (Including Private 5G)	Secure Access Service Edge (SASE)
Computacenter	Product Challenger	Product Challenger	Not In	Not In
DXC Technology	Product Challenger	Contender	Product Challenger	Not In
Extreme Networks	Not In	Product Challenger	Product Challenger	Not In
FatPipe	Not In	Not In	Contender	Not In
Flexiwan	Not In	Not In	Contender	Not In
GTT	Leader	Rising Star ★	Product Challenger	Leader
HCLTech	Leader	Leader	Leader	Leader
HPE Aruba	Not In	Not In	Market Challenger	Not In
Infosys	Not In	Product Challenger	Product Challenger	Contender
Kyndryl	Leader	Leader	Leader	Product Challenger

Provider Positioning

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	Managed SD-WAN Services	SD-Networks Transformation Services (Consulting and Implementation)	Edge Technologies and Services (Including Private 5G)	Secure Access Service Edge (SASE)
Logicalis	Leader	Product Challenger	Leader	Not In
Lumen Technologies	Product Challenger	Product Challenger	Leader	Leader
Microland	Leader	Leader	Product Challenger	Leader
Mphasis	Product Challenger	Product Challenger	Product Challenger	Contender
NTT DATA	Product Challenger	Not In	Not In	Product Challenger
Open Systems	Not In	Not In	Not In	Market Challenger
Orange Business	Leader	Leader	Leader	Leader
Pica8	Not In	Not In	Contender	Not In
Red River	Contender	Market Challenger	Product Challenger	Product Challenger
Tata Communications	Product Challenger	Not In	Not In	Product Challenger

Provider Positioning

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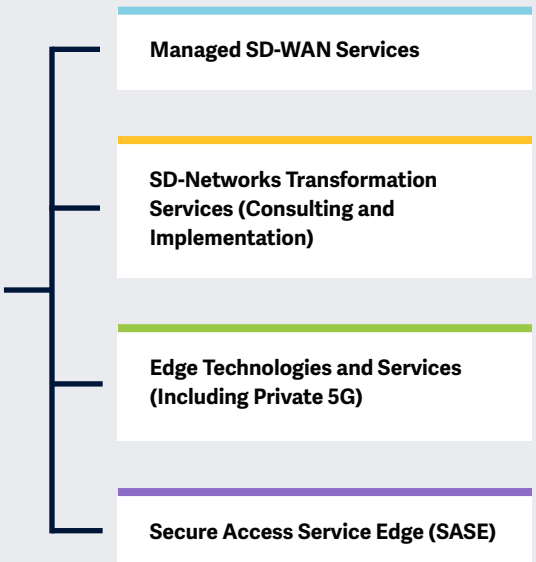
	Managed SD-WAN Services	SD-Networks Transformation Services (Consulting and Implementation)	Edge Technologies and Services (Including Private 5G)	Secure Access Service Edge (SASE)
TCS	Rising Star ★	Product Challenger	Product Challenger	Not In
Tech Mahindra	Product Challenger	Leader	Product Challenger	Product Challenger
T-Mobile	Product Challenger	Product Challenger	Leader	Leader
Verizon Business	Leader	Leader	Leader	Leader
Wipro	Product Challenger	Leader	Leader	Product Challenger
Zensar Technologies	Contender	Contender	Not In	Not In

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

Simplified Illustration Source: ISG 2025



Definition

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

The study also examines edge technologies and services, such as IoT, universal/virtual customer premises equipment (u/vCPE) and software-defined local area network (SD-LAN) extending to branch locations and private mobile network delivery through 5G technologies. The analysis explores service offerings across these segments. The study also investigates secure access service edge (SASE), a comprehensive and secure network environment that integrates SD-WAN and offers businesses a fully integrated secure solution for their networking needs.

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

Scope of the Report

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

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

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

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

Provider Classifications

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

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between $20 million and $999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above $1 billion, with activities worldwide and globally distributed decision-making structures.

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

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

Provider Classifications: Quadrant Key

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

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.

Managed SD-WAN Services

Who Should Read This Section

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

Networking professionals

Should read this report to understand the SD-WAN landscape and providers' integration capabilities and partnerships to effectively manage SD-WAN services.

Digital transformation professionals

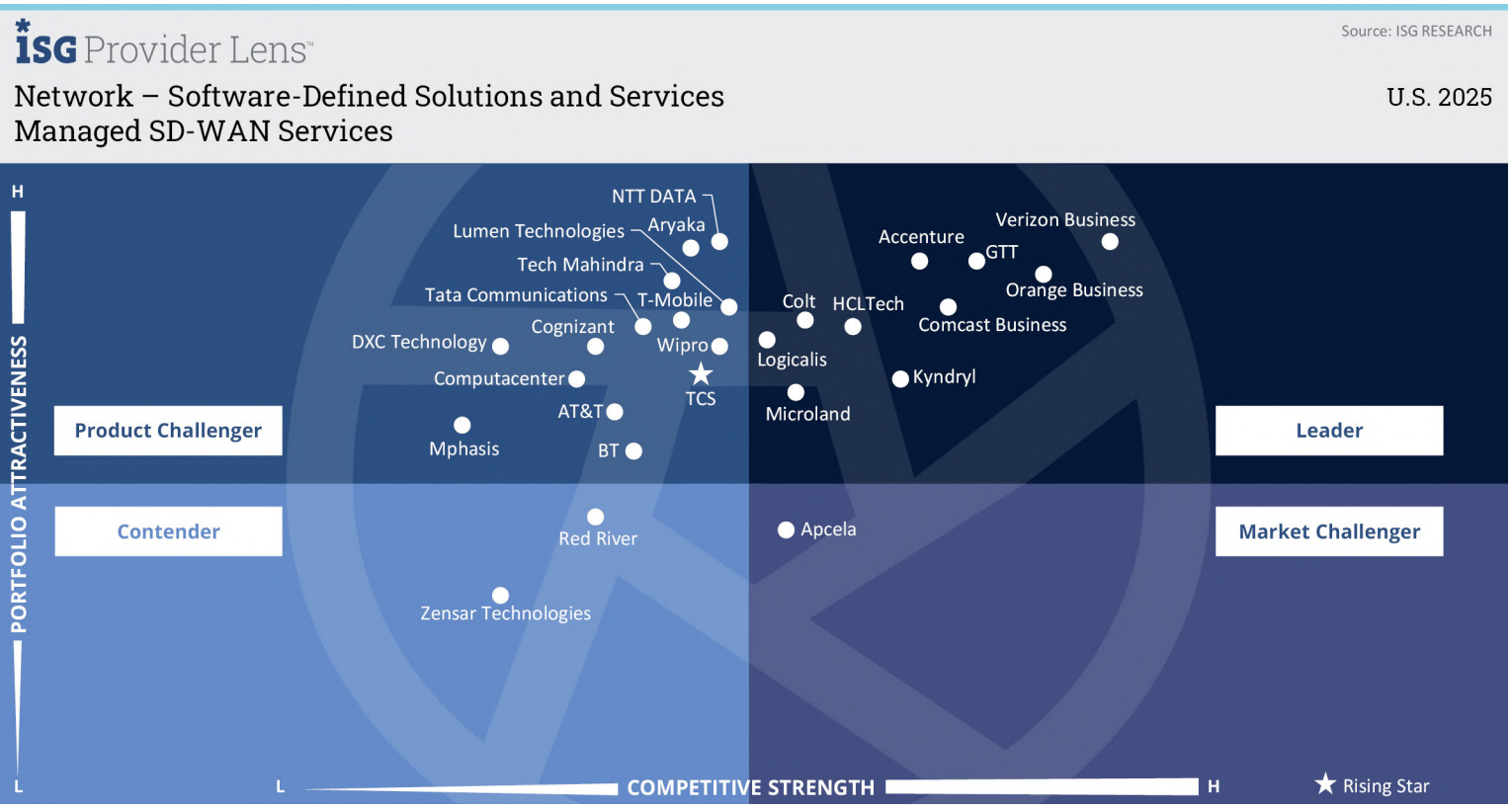
Should read this report to understand how managed SD-WAN service providers align with their enterprise transformation journey and compare with one another.

Cybersecurity professionals

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

Procurement professionals

Should read this report to understand managed SD-WAN service providers' terms, including SLAs, KPIs, service and quality levels, and pay-as-you-consume options.



This quadrant assesses providers of **managed SD-WAN solutions** and next-generation networks, highlighting those that deliver **managed or comanaged services** for **future-proof networking capabilities.**

Dr. Kenn D Walters

Definition

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

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

Eligibility Criteria

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

Observations

Enterprise networking in the U.S. continues to witness significant growth in the adoption of managed SD-WAN, as organizations continue to migrate to the cloud and place increasing emphasis on network security. Do-it-yourself (DIY) SD-WAN solutions have seen a sustained decline across most sectors, largely due to the rising complexity of modern enterprise networks and the challenges of sustaining the necessary internal resources and expertise to effectively self-manage and operate evolving SD-WAN solutions.

Providers of managed SD-WAN solutions have demonstrated successful transitions and operations across a wide array of industries and enterprise sizes within the U.S. The risks associated with non-SD-WAN networks and the benefits and challenges of implementing full SD-WAN solutions have been extensively studied and documented through numerous case studies both within the U.S. and globally.

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

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

accenture

Accenture's Cloud First Networks + 5G practice is AI driven, uniting over 12,000 experts globally and serving key client segments. This expertise is further strengthened by 23 network and security labs worldwide.

colt

Colt provides a robust enterprise SD-WAN solution integrated within its SDN and OSS environments. Its managed services include a secure global underlay, positioning it as a rapidly growing market player.

COMCAST

Comcast Business offers advanced SD-WAN solutions with both fully managed and comanaged options. As a technology-neutral provider, it collaborates with leading vendors to tailor solutions that precisely meet customer needs.

GTT

GTT delivers customized solutions to address unique client requirements, incorporating integrated security features from in-house and partner offerings. Its global Tier 1 IP backbone ensures efficient traffic transport between locations.

HCLTech

HCLTech's managed SD-WAN services empower enterprises to modernize their networks with a flexible, consumption-based model that enhances simplicity, agility and efficiency.

kyndryl

Kyndryl specializes in consulting, implementation and managed network services, supporting core-to-edge operations. Its portfolio includes hybrid cloud connectivity and a centralized monitoring and management system.

LOGICALIS
Architects of Change

Logicalis offers the Logicalis Digital Fabric Platform with Intelligent Connectivity, enabling next-generation networking for businesses. Its comprehensive solution suite includes private 5G, SD-WAN, SASE, SSE and data center services.

MICROLAND
Making digital happen

Microland enhances operational efficiency through open networking, self-healing networks and intent-based networking powered by AI and cognitive capabilities. It provides comprehensive SD-WAN/SDN transformation and operational services.

Orange Business offers managed, comanaged and custom SD-WAN solutions with advanced platform and operational models. Expert operational teams ensure continuous innovation and adaptability for customers.

Verizon Business, through its strategic partnerships with HCLTech and others, has expanded its operational capacity. By owning and operating its network, Verizon Business leads in customer acquisition, sales, solutions and overall network development.

TCS (Rising Star) delivers advanced managed SD-WAN solutions, leveraging platforms, advanced tools, industry expertise and coinnovation centers to enhance solution efficiency and drive network transformation.

Leader

"Orange Business drives transformation with advanced managed SD-WAN services, utilizing advanced technology, automation and AI-driven capabilities as part of its Digital Infrastructure and Evolution Platform initiatives."

Dr. Kenn D Walters

Orange Business

Overview

Orange Business is headquartered in Paris, France. It has more than 30,000 employees across over 100 offices in 65 countries. In FY24, the company generated €7.8 billion in revenue, with IT & Integration Services as its largest segment. In the U.S. market, Orange Business offers a comprehensive portfolio of network services and solutions, backed by three Tier 4 data centers to ensure high availability, security and performance. The company employs an advisory-led approach, providing enterprises with tailored SD-WAN solutions, including its flagship Evolution offering delivering SD-WAN.

Strengths

Platform-driven performance and security: Orange Business' Evolution Platform is engineered to optimize network performance and security, providing a fit-for-purpose infrastructure that supports the seamless execution of critical services. With many highly network-dependent solutions, the platform ensures proper service chaining, execution and end-to-end visibility. It also enables the integration and management of multivendor implementations, delivering a cohesive SD-WAN, SSE and SASE with seamless interoperability.

Seamless digital service integration: Orange Business is actively expanding its next-generation deployments, assisting customers through a full-service engagement model — from the consultative phase to implementation and ongoing management. This approach enables seamless digital service integration, enhanced service orchestration and coinnovation, ensuring that enterprises achieve optimized connectivity, security and operational efficiency in their SD-WAN transformations.

Flexible operational portfolio: Orange Business offers a comprehensive range of service models, including fully managed, comanaged and customized operational frameworks. A robust suite of monitoring and service management tools enhances all service models, driving operational efficiency.

Caution

Orange Business, now focusing on platform-driven services, automation, cloud integrations and SD-networks, must continue to maintain clear, consistent communication with existing and new clients to explain how it is navigating the evolving market expectations in 2025.

SD-Networks Transformation Services (Consulting and Implementation)

Who Should Read This Section

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

Networking professionals

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

Digital transformation professionals

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

Cybersecurity professionals

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

Procurement professionals

Should read this report to explore the pricing models offered by transformation service providers, especially pay-as-you-consume or similar pricing schemes.

ISG Provider Lens™

Source: ISG RESEARCH

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

U.S. 2025

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

Dr. Kenn D Walters

SD-Networks Transformation Services (Consulting and Implementation)

Definition

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

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

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

Eligibility Criteria

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

Observations

Advisory-driven engagements are prevalent in the U.S. due to the complexity of SD-networking, which demands expertise in enterprise- and industry-specific domains. Strategic technology planning is essential to align with enterprises' evolving business objectives and deliver measurement metrics at this level. These engagements typically involve skilled advisory teams with extensive industry experience, contributing across roles such as presales, road mapping, and, in many cases, implementation support.

Enterprises have increasingly turned to traditional independent consulting firms and SIs to fulfil strategic and tactical planning needs. These entities deploy advisory personnel focused on providing unbiased recommendations, competing to deliver the most effective plans tailored to enterprise goals. By leveraging proprietary intellectual property and robust partner networks, they execute solutions that align well with the enterprise's needs.

As a response to independent consulting firms and SIs, major network service providers in the U.S. have incorporated consulting and advisory teams into their business units. These providers aim to deliver vendor-neutral solutions and specialized services akin to those offered by consulting firms. SIs leverage partner ecosystems to address diverse client needs as required.

All suppliers now employ advanced methodologies, certifications and structured implementation processes to ensure seamless transitions from strategic planning to operational deployment. These approaches prioritize risk mitigation and ensure solution alignment with business objectives.

From the 151 companies assessed for this study, 25 qualified for this quadrant, with 10 Leaders and one Rising Star.

accenture

Accenture leverages extensive expertise to deliver tailored solutions with deep industry knowledge that aligns with client needs and evolving industry trends. The company continuously expands its capabilities through organic growth and strategic acquisitions.

apcela

Apcela focuses its transformation advisory services effectively by integrating its Arcus Platform whenever possible. It offers managed services, cloud-centric solutions, enterprise hybrid WAN networks, SD-networking and security IaaS solutions.

COMCAST

Comcast Business offers expert advisory teams and advanced tools to support the design and deployment of SASE-compliant managed SD-WAN solutions. These services can be either fully managed or comanaged in collaboration with customers.

HCLTech

HCLTech enhances SD-WAN transitions with a dedicated consultancy practice that continuously evaluates performance, ensuring optimized network transformation. It helps enterprises transform their network environment to deliver simplicity, agility and efficiency.

kyndryl

Kyndryl provides consulting, design, implementation and managed services while continuously strengthening its advisory team. Its approach centers on comprehensive core-to-edge solutions.

MICROLAND
Making digital happen

Microland employs the Microland Intelligent Network Experience – Consult framework to build business cases, provide advisory services and evaluate SD-WAN technologies. Its consulting services focus on holistic next-generation technology architectures.

SD-Networks Transformation Services (Consulting and Implementation)

Orange Business provides end-to-end consulting and support for SD-WAN and SASE transformation projects, guiding clients from initial assessment through implementation and ongoing operations.

Tech Mahindra delivers advanced SD-networking models through advisory services backed by industry expertise, tools and processes. It integrates managed services, engineering support and advanced automation into its transformation services.

Verizon Business adopts a consultative approach to help enterprises transition to SD-networks. With a highly skilled team, the company invests in integration tools, platforms, orchestration and automation.

Wipro utilizes Insightix™, a digitized framework for network consulting and assessment, to develop transformation road maps that align with business objectives in both the short and long term as part of its transformation processes.

GTT (Rising Star) specializes in tailoring solutions to client needs aligned with its global offerings. It offers various integrated security options through its proprietary and partner-provided solutions. The Envision platform supports enterprises' advisory-to-operation journey, enhancing the overall experience.

Leader

"Orange Business leverages its extensive expertise to provide robust, framework-driven advisory services. It offers various methods, products and solutions for business and network transformation."

Dr. Kenn D Walters

Orange Business

Overview

Orange Business is headquartered in Paris, France. It has more than 30,000 employees across over 100 offices in 65 countries. In FY24, the company generated €7.8 billion in revenue, with IT & Integration Services as its largest segment. Orange Business' strategy focuses on three pillars: *Innovation, Trust* and *Integrated Expertise* across its 3Cs strategy — *connectivity, cloud and cybersecurity*. Its Evolution Platform ensures scalable, secure AI-driven solutions. A key differentiator lies in the integration of comprehensive services, supported by 3,800 network, 2,700 cloud and 2,500 cybersecurity experts, allowing the delivery of high-quality end-to-end infrastructure solutions.

Strengths

User-friendly platform: The Evolution platform provides customers quick access to appropriate technologies and services, supported by service levels that align with customer expectations for value. The Evolution Platform infrastructure functions like the cloud but grounded with end-to-end service and SLAs. This is supported with 48 SuperPOPs to ensure high-quality end-user experience.

Strategic positioning for growth: With a strong foundation in data services and an extensive network, Orange Business is well-positioned to expand into high-growth, complex B2B areas such as big data, IoT, cybersecurity, cloud computing and business applications.

Flexible operating models: Orange Business offers a range of operating models, from DIY to fully managed solutions, tailored to each customer's needs. These models are supported by digital enablers such as self-care portals, APIs and advanced monitoring tools, complemented by a strong partner ecosystem.

Transition and transformation services: Orange Business provides comprehensive consulting and support for ongoing or one-time SD-WAN/SASE transformation projects. The process begins with a detailed context assessment and extends through deployment and operations. The company conducts periodic reviews of network design and solutions, ensuring they evolve with changing business needs.

Caution

Following a recent strategic reorganization around four key pillars, Orange Business has smoothly adapted to its new focus areas. However, in 2025, it may face minor realignment challenges due to strong competition and concerns that it may be focusing on small key geographical areas.

Edge Technologies and Services (Including Private 5G)

Who Should Read This Section

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

Networking professionals

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

Digital transformation and operations professionals

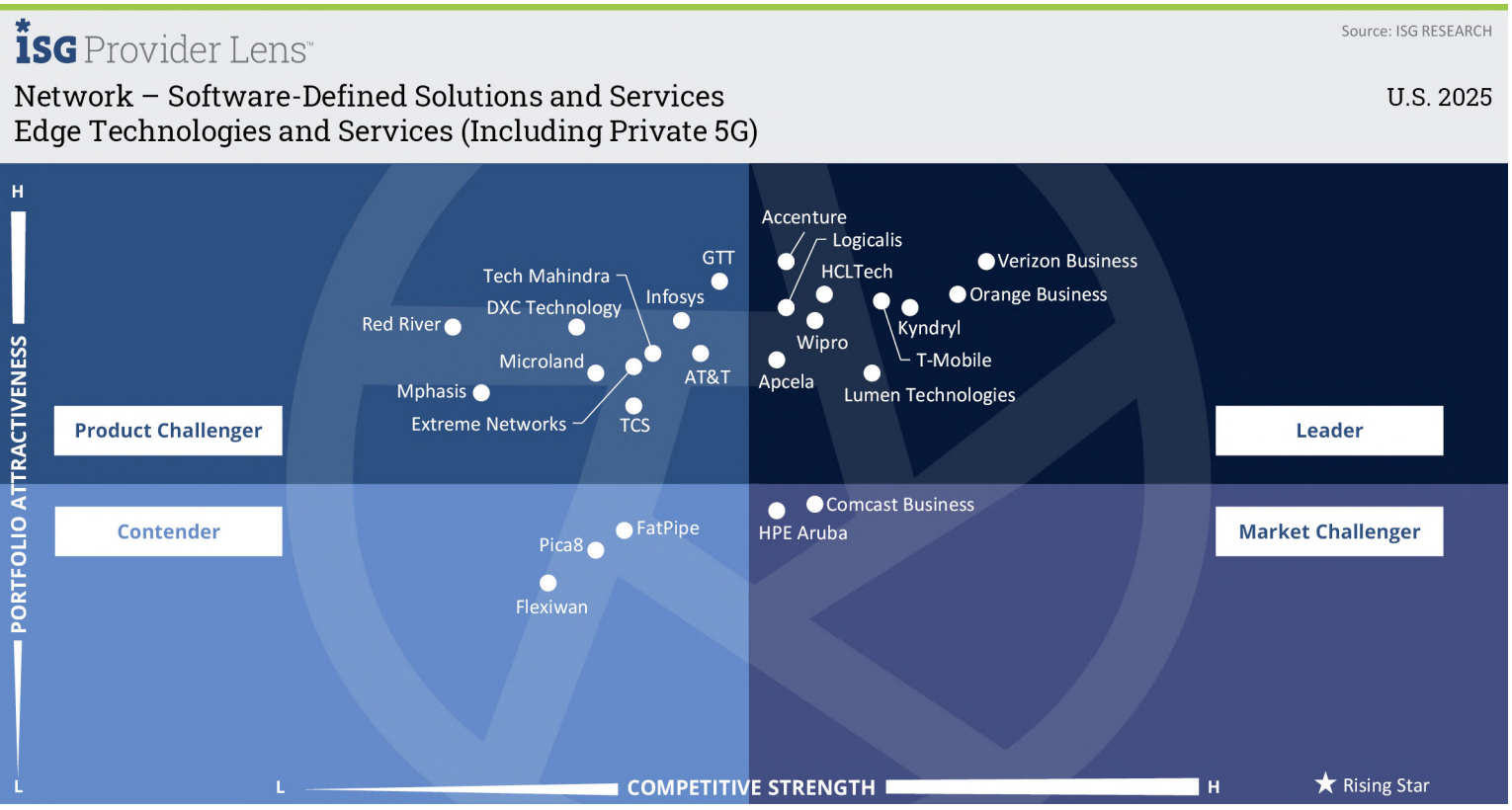
Should read this report to understand how providers align with their transformation journey and monitor ongoing network performance.

Cybersecurity professionals

Should read this report to gain insights into providers' security capabilities in delivering mobile network services.

Data analytics professionals

Should read this report to identify the high-level data that can be analyzed after being collected from edge devices, providing actionable insights.



This section analyzes providers delivering diverse **network edge solutions** for enterprise networks, including **SD-LAN, private 5G with SD management** and **next-generation edge-focused solutions** and services.

Dr. Kenn D Walters

Definition

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

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

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

Eligibility Criteria

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

Observations

The enterprise network edge, a critical interface between internal networks and external systems, is pivotal in ensuring seamless connectivity, optimized data flow and secure access for organizations. Edge technologies have evolved to offer solutions that enhance security, improve performance and enable efficient access to cloud services. This technological domain has experienced rapid growth, driven by innovations in edge computing, network edge, branch edge and remote edge solutions. Key contributors to this expansion include IoT, encompassing IIoT sensors, control and security devices, alongside advancements in SD-networking solutions such as SD-LAN, SD-WLAN and SD-network managed Wi-Fi and private 5G. These technologies address the complexities of modern IT environments and enable enterprises to achieve superior operational efficiency.

One of the primary advantages of adopting network edge technologies is improved network performance and reliability. By leveraging tools such as edge computing, SD-networking and management, along with network function virtualization (NFV) at the data center, enterprises can process data close to its source, reducing latency, enhancing application performance and enabling real-time analytics. As a result, edge technology has emerged as a strategic priority, intersecting with global trends such as Industry 4.0 advancements, real-time analytics, robotics, telematics with telemetry, energy consumption metrics and *green goals*. The widespread adoption of edge technology underscores its importance in enabling innovation, operational efficiency and competitive advantage in an increasingly connected world.

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

accenture

Accenture's Converged Edge Networking practice, along with its Cloud Network Operator, which specifically focuses on private network 5G deployments and branch automation, produces next-generation solutions with optimized operational delivery.

apcela

Apcela offers innovative solutions, such as the AppHUB, Alpha and Arcus platforms, along with Arcus services, to enhance security and mobility at the network edge. These solutions integrate automation to extend advanced security measures to the edge.

HCLTech

HCLTech provides comprehensive edge solutions by leveraging its expertise in 5G and wireless networks to drive optimization and transformation. These solutions include pervasive wireless mobility as a service and private 5G integration.

kyndryl

Kyndryl has a dedicated edge solutions team specializing in robust edge optimization and transformation. Its expertise in 5G and wireless networks supports a diverse range of advanced solutions.

LOGICALIS Architects of Change

Logicalis delivers consultation, implementation and managed services across various network connectivity options, including SDN and private 5G. The company utilizes advanced technology, orchestration and management tools to enhance network performance.

LUMEN

Lumen Technologies offers Edge Fabric platform to strengthen network resilience, extend cloud services, and ensure high availability and control. The platform integrates compute, cloud, storage, networking, security, and orchestration into a comprehensive stack.

orange Business

Orange Business provides the Evolution Platform, enabling extensive scalability at the network edge. This platform fosters seamless collaboration with technology vendors, accelerating customer access to partner innovations with enhanced security.

T-Mobile

T-Mobile delivers a private mobile network tailored for high-performance applications, including industrial AI automation and autonomous robotics. Its enterprise solutions incorporate edge computing and hyperconverged infrastructure for efficient processing.

verizon

Verizon Business offers a broad portfolio of network edge solutions, encompassing virtual network services (VNS), intelligent edge, private 5G and multi-access edge computing (MEC). Additional AI-driven orchestration, SD-network and multicloud integration are also offered.

wipro

Wipro combines proprietary products and services with an extensive partner ecosystem to deliver computing solutions for telecommunications and enterprise clients. Key offerings include Edge Cloud and the BoundaryLess Universal Edge (BLUE).

Leader

"Orange Business collaborates with top-tier partners to deliver next-generation solutions. It applies in-depth technical expertise to develop edge solutions that provide significant value to customers."

Dr. Kenn D Walters

Orange Business

Overview

Orange Business is headquartered in Paris, France. It has more than 30,000 employees across over 100 offices in 65 countries. In FY24, the company generated €7.8 billion in revenue, with IT & Integration Services as its largest segment. Orange Business delivers a comprehensive and powerful suite of solutions in the network edge segment. By leveraging its extensive partner network and integrating it with the Evolution platform, the company enhances its service offerings. Recognizing edge technologies as a holistic solution, the company continues to expand its edge portfolio by utilizing its vast experience in networking, cloud, 5G security, LAN and IoT solutions.

Strengths

Scalability at the network edge: Orange Business' Evolution Platform is designed to enable extensive scalability at the network edge. By enhancing network performance and security, the platform facilitates significant expansion of edge topology. This approach fosters unique collaborations with technology vendors, ensuring customers gain access to advanced and secure solutions rapidly.

SD-Branch and uCPE offerings: Orange Business provides SD-branch solutions from Cisco/Meraki and Aruba, along with universal Customer Premises Equipment (uCPE) solutions from Ekinops and Cisco, including ENCS and Catalyst options. These solutions include full implementation and managed service support, ensuring a seamless CX.

Leveraging Evolution Super Pops at the edge: Expanding on software-defined themes such as central management, automation and security, Orange Business has introduced Evolution SuperPops to facilitate LAN orchestration and hosting services, such as virtual Cisco DNA Center and Aruba ClearPass. With integrated internet and cloud connectivity, these SuperPops enable cloud networking connectivity between traditional customer LAN data centers (DCs) and cloud DCs, enhancing network efficiency and flexibility at the edge.

Caution

While Orange Business excels in integrating and deploying both proprietary and partner solutions, sustaining its competitive edge in the U.S. market requires continuous demonstration of its USPs. Orange Business must use more U.S. reference cases to reinforce its market position.

Secure Access Service Edge (SASE)

Who Should Read This Section

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

Networking professionals

Should read this report to understand SASE service providers' technical and integration capabilities and partnerships.

Digital transformation professionals

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

Cybersecurity professionals

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

Change management specialists

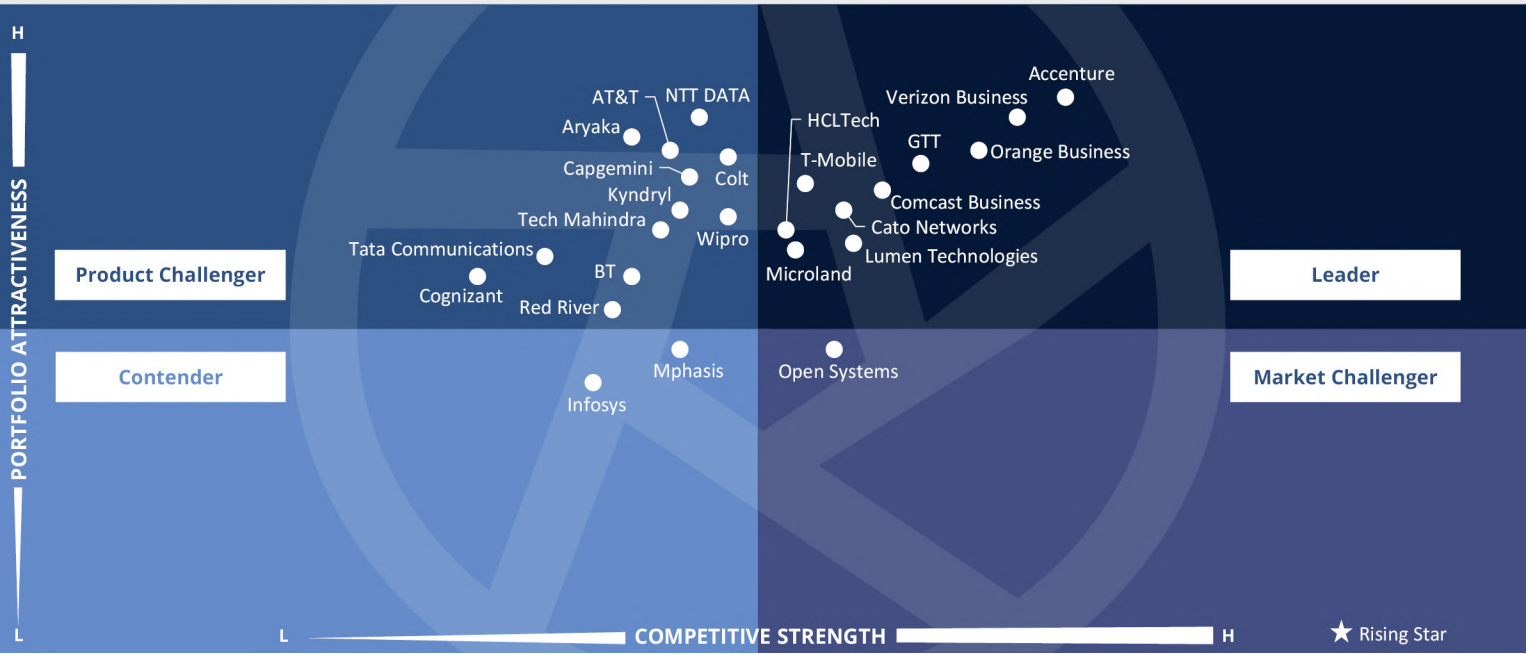
Should review this report to understand how SASE service providers align with their organizational change initiatives and assess their relative performance against industry standards.

ISG Provider Lens™

Source: ISG RESEARCH

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

U.S. 2025



This quadrant examines **SASE providers' solutional approach** to integrating **SD-networks and advanced security,** offering **comprehensive, end-to-end solutions** that span from **core** infrastructure to the **network and location edges.**

Dr. Kenn D Walters

Definition

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

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

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

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

Eligibility Criteria

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

Observations

The evolution of integrated secure enterprise networks has transitioned from fragmented solutions to fully integrated frameworks under the acronym SASE (Secure Access Service Edge). This innovative approach has gained consensus on its core components (detailed in the quadrant definition), enabling SASE to move beyond pilot projects to widespread commercial adoption. Leading providers now offer robust SASE solutions, positioning it as a cornerstone for secure enterprise network transformation.

In the U.S., SASE is among the fastest-growing segments in the enterprise transformation and networking sector. This growth is expected to be fueled by the rise of SASE innovators and established SIs partnering with prominent providers. Together, they deliver end-to-end, highly secure networking tailored to corporate needs, making SASE integral to modern enterprise strategies.

A closely related concept, Security Service Edge (SSE), is often also offered. SSE encompasses cloud-based security tools such as cloud access security broker (CASB), secure web gateway (SWG), FWaaS and ZTNA but does not offer an integrated SD-WAN. These components form a substantial portion — ranging from half to two-thirds — of a complete SASE architecture.

SSE is particularly appealing to early adopters of SD-networking in the U.S., as it integrates with existing SD-WAN deployments. This integration offers organizations potentially a slightly less comprehensive yet SASE-like solution, bridging the gap between traditional SD-networking and the full capabilities of SASE.

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

accenture

Accenture provides services through its focused Networks and 5G practice area, emphasizing security, consistency, scalability and adaptability. This approach creates a modern, software-driven, cloud-native network that enables SASE for businesses.

Cato Networks

Cato Networks delivers a full SASE and SSE platform that offers cloud-driven flexibility and scale. By integrating security functions into a cloud-native stack, Cato eliminates the need for multiple edge security devices in SASE or SSE.

COMCAST

Comcast Business offers SASE solutions backed by Fortinet and Equinix Fabric, along with a hybrid SASE option that includes Comcast Business SD-WAN (via Versa) and Unified Secure Access (via Palo Alto Prisma Access).

GTT

GTT delivers GTT Secure Connect, integrating SD-WAN and SSE into a SASE framework. With a full suite of networking and multilayered security solutions from leading partners, GTT ensures advanced protection.

HCLTech

HCLTech offers a cloud-native SASE security platform that is seamlessly integrated with the Fusion Platform, improving user engagement, optimizing operations and delivering cost-effective results.

LUMEN

Lumen Technologies unifies elements from top SD-WAN vendors with its network security capabilities into a cohesive SASE framework with global access. The SASE suite is available through its comprehensive online management and purchase system.

MICROLAND
Making digital happen

Microland's SASE solution is embedded in Microland ONE (One Network Experience) – SmartSec Branch, a comprehensive security framework built to safeguard modern networks, particularly as cloud adoption, remote work and distributed setups grow.

Orange Business incorporates a partner's security-centric networking technology into its Evolution Platform to strengthen security and networking integration while boosting efficiency. This approach ensures instant service updates and outstanding CX.

T-Mobile

T-Mobile's Business Group has formed an alliance with Versa and Deutsche Telekom to combine their expertise in SASE. Its U.S. operations will focus on growing its partner ecosystem and introducing new collaborations and solution offerings in 2025.

Verizon Business' SASE introduces a solution that integrates secure network access with security services into a seamless, cloud-based service architecture and efficient solution set.

Leader

"Orange Business delivers an extensive portfolio of next-generation SASE solutions, supported by its Orange Cyberdefense business unit and global security operations centers, ensuring advanced threat protection and network security."

Dr. Kenn D Walters

Orange Business

Overview

Orange Business is headquartered in Paris, France. It has more than 30,000 employees across over 100 offices in 65 countries. In FY24, the company generated €7.8 billion in revenue, with IT & Integration Services as its largest segment. Orange Business integrates AI-driven orchestration with its Next Gen Hub, offering flexible SD-WAN solutions, managed secure access and adaptable SASE security upgrades. Its approach is strengthened by the expertise of the Orange Cyberdefense unit and its globally distributed security operations centers, which provide continuous monitoring and threat mitigation by leveraging its extensive international backbone.

Strengths

Cloud-optimized network performance: The Orange Business Evolution Platform is a cloud-native network and security solution that provides a seamless, high-performance experience. Built on Orange Business' global infrastructure, this platform optimizes network security, flexibility and efficiency while delivering a scalable, cloud-like experience.

Advanced SD-WAN and SASE capabilities: Orange Business offers an automated, AI-driven network architecture that supports on-demand virtualized services. With centralized management, it ensures robust performance, improved security, support for diverse connection types and smooth integration with SASE frameworks.

Provision of managed secure access (MSA): Designed to secure users, applications and data from any location, MSA provides a consistent security framework across enterprise environments. Operated within Orange Cyberdefense SOCs, this service offers a cloud-based security infrastructure, reducing the need for physical hardware at data centers and remote sites while ensuring a seamless and secure UX.

Extensive partner ecosystem: Orange Business works with many SASE players and can resell or offer a fully managed offer on Zscaler, Palo Alto Networks, Netskope and Fortinet. The company provides a consistent, secure experience for both off-premises mobile users and branch offices.

Caution

Orange Business delivers a comprehensive suite of SASE and cyber defense services, which may make distinguishing between SD-WAN and SASE offerings complex. Clear differentiation, U.S. use cases and reference materials could enhance client understanding and adoption of its solutions.

Appendix

Methodology & Team

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

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

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

The study was divided into the following steps:

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

Lead Author

Dr. Kenn Walters

Global Principal Lead Analyst

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

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

Research Analyst

Shatakshi Singh

Research Analyst

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

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

Study Sponsor

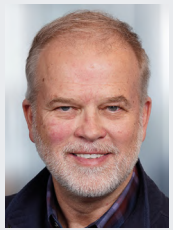
Heiko Henkes

Managing Director

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

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

IPL Product Owner



Jan Erik Aase

Partner and Global Head – ISG Provider Lens™

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

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

ISG Provider Lens™

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

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

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ISG

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

For more information, visit isg-one.com.

ISG Provider Lens™

JUNE, 2025

REPORT: NETWORK – SOFTWARE-DEFINED SOLUTIONS AND SERVICES