iSG Provider Lens™

Network – Software-Defined Solutions and Services

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

Table of Contents 🏠

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 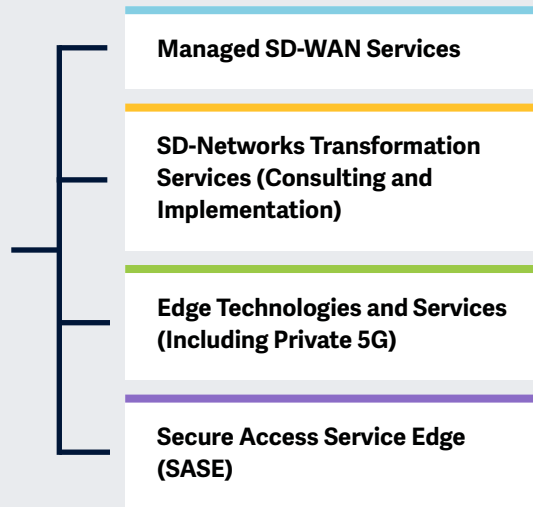(SASE), a comprehensive and secure network environment that integrates SD-WAN and offers businesses a fully integrated secure solution for their networking needs.

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.

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

Simplified Illustration Source: ISG 2025

Managed SD-WAN Services

SD-Networks Transformation Services (Consulting and Implementation)

Edge Technologies and Services (Including Private 5G)

Secure Access Service Edge (SASE)

Definition

The ISG Provider Lens™ study, Network – Software-Defined Solutions and Services 2025, offers the following to business and IT decision-makers:

- Transparency on the **strengths and weaknesses** of relevant providers and their offerings
- **Differentiated positioning** of providers in each quadrant based on their competitive strengths and portfolio attractiveness
- Focus on **different markets**, including APAC, Germany, the U.K. and the U.S.

Our study **serves as an important decision-making basis** for positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their current vendor relationships and potential engagements.

Managed SD-WAN Services

Definition

This quadrant focuses on managed enterprise SD-WAN solutions and service providers delivering these offerings to enterprises as fully managed or comanaged *as-a-service* solutions — regardless of the network hardware and software. SD-WAN solutions 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 SD-WAN network including AI and Automation in Network Operations (AIOps)

5. **Proven capability** in seamlessly implementing new services and networks in commercial deployments

6. **Comprehensive and stable road mapping abilities,** allowing updates as required

7. Reference customer or cultural alignment or site **volume in deployment**

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

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

Edge Technologies and Services (Including Private 5G)

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**

Secure Access Service Edge (SASE)

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), zero trust network access (ZTNA) and secure web gateways (SWGs).

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

Eligibility Criteria

1. Product **portfolio coverage,** focus areas, **completeness of solutions** and fully integrated broader solutions linking to data centers or other enterprise IT applications and systems

2. Membership or affiliation (including inputs) with **global SASE technical and trade groups**

3. Ability to enable clients to **reuse their existing network** and ICT solutions, if required, and not merely *rip and replace*

4. Ability to deliver **training and** provide **testing** for clients

5. **Industry-specific knowledge** and experience mapped to the client type

6. **Scope of partnerships and offerings** and management capability for the needed orchestration within a customer project

7. **Reference customers or solutions** in commercial deployment

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

As part of this ISG Provider Lens™ quadrant study, we are introducing the following four quadrants on Network – Software-Defined Solutions and Services 2025.

Quadrant	APAC*	Germany	U.S.	U.K
Managed SD-WAN Services	✔	✔	✔	✔
SD-Networks Transformation Services (Consulting and Implementation)	✔	✔	✔	✔
Edge Technologies and Services (including Private 5G)	✔	✔	✔	✔
Secure Access Service Edge (SASE)	✔	✔	✔	✔

*APAC includes India, ASEAN (Singapore, Malaysia, Indonesia, Thailand and the Philippines), Japan, South Korea, Australia and New Zealand

The research phase falls in the period between January and February 2025, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in June 2025.

Milestones	Beginning	End
Survey Launch	January 8, 2025	
Survey Phase	January 9, 2025	February 10, 2025
Sneak Previews	May 13, 2025	
Press Release & Publication	June, 2025	

Please refer to the link to view/download the ISG Provider Lens™ 2025 research agenda

Access to Online Portal

You can view/download the questionnaire from here using the credentials you have already created or refer to instructions provided in the invitation email to generate a new password. We look forward to your participation!

Research Production Disclaimer:

ISG collects data for the purposes of writing research and creating provider/vendor profiles. The profiles and supporting data are used by ISG advisors to make recommendations and inform their clients of the experience and qualifications of any applicable provider/vendor for outsourcing the work identified by clients. This data is collected as part of the ISG FutureSource™ process and the Candidate Provider Qualification (CPQ) process. ISG may choose to only utilize this collected data pertaining to certain countries or regions for the education and purposes of its advisors and not produce ISG Provider Lens™ reports. These decisions will be made based on the level and completeness of the information received directly from providers/vendors and the availability of experienced analysts for those countries or regions. Submitted information may also be used for individual research projects or for briefing notes that will be written by the lead analysts.

ISG Star of Excellence™ – Call for nominations

The Star of Excellence™ is an independent recognition of excellent service delivery based on the concept of "Voice of the Customer." The Star of Excellence™ is a program, designed by ISG, to collect client feedback about service providers' success in demonstrating the highest standards of client service excellence and customer centricity.

The global survey is all about services that are associated with IPL studies. In consequence, all ISG Analysts will be continuously provided with information on the customer experience of all relevant service providers. This information comes on top of existing first-hand advisor feedback that IPL leverages in the context of its practitioner-led consulting approach.

Providers are invited to nominate their clients to participate. Once the nomination has been submitted, ISG sends out a mail confirmation to both sides. It is self-evident that ISG anonymizes all customer data and does not share it with third parties.

It is our vision that the Star of Excellence™ will be recognized as the leading industry recognition for client service excellence and serve as the benchmark for measuring client sentiments.

To ensure your selected clients complete the feedback for your nominated engagement please use the Client nomination section on the Star of Excellence™ website.

We have set up an email where you can direct any questions or provide comments. This email will be checked daily, please allow up to 24 hours for a reply.

Here is the email address:
ISG.star@isg-one.com

ISG Star of Excellence

Methodology & Team

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

Study Sponsor:
Heiko Henkes

Lead Authors:
Kenn Walters and Yash Jethani

Editors:
Radhika V and Ananya Mukherjee

Research Analyst:
Shatakshi Singh

Data Analyst:
Sibasis Panigrahy

Quality & Consistency Advisors:
Margot Wall, Liam Chin and Jon Harrod

Project Manager:
Shona Merin Jacob

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

The research and analysis presented in this report includes research from the ISG Provider Lens program, ongoing ISG Research programs, interviews with ISG advisors, briefings with 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 January 2025, 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.

Contacts For This Study

Study Sponsor

Kenn Walters

Overall Lead and Lead Analyst, Germany and U.S.

Yash Jethani

Lead Analyst, U.K and APAC

Shatakshi Singh

Research Analyst

Sibasis Panigrahy

Data Analyst

Shona Merin Jacob

Global Project Manager

ISG Provider Lens Advisors Involvement Program

ISG Provider Lens offers market assessments incorporating practitioner insights, reflecting regional focus and independent research. ISG ensures advisor involvement in each study to cover the appropriate market details aligned to the respective service lines/technology trends, service provider presence and enterprise context.

In each region, ISG has expert thought leaders and respected advisors who know the provider portfolios and offerings as well as enterprise requirements and market trends. On average, three advisors participate as part of each study's quality and consistency review team (QCRT). The QCRT ensures each study reflects ISG advisors' experience in the field, which complements the primary and secondary research the analysts conduct. ISG advisors participate in each study as part of the QCRT group and contribute at different levels depending on their availability and expertise.

The QCRT advisors:

- Help define and validate quadrants and questionnaires.

- Advise on service provider inclusion, participate in briefing calls.

- Give their perspectives on service provider ratings and review report drafts.

ISG Advisors to this study

Margot
Wall

Principal Consultant

Liam
Chin

Principal Consultant

Jon
Harrod

Partner

Invited Companies

If your company is listed on this page or you feel your company should be listed, please contact ISG to ensure we have the correct contact person(s) to actively participate in this research.

Accenture*	Axiata Group*	Celcom Malaysia	Dragonfly Technologies Pty Ltd
Acronym solutions	Bechtle	Centrify*	DXC Technology*
AD Network Solutions	BECOM	Cisco	DXN limited
Advatek	Bharti Airtel*	Citrix*	Epsilontel
AIS	Black Box	Claranet*	Ericsson
Allied Telesis Holdings K.K.	Blaze Networks	Cognizant*	Evolving Networks*
Apcela*	Boldyn Networks	Colt*	Expereo*
APX Net, Inc	Breeze Networks	Comcast Business*	Exponential-e*
Aqovia	BT*	Computacenter*	Extreme Networks*
Arista*	Cambium Networks	Controlware	FatPipe*
Aryaka	CANCOM*	Crown Castle*	flexiWAN*
AT&T*	Capgemini*	Damovo	Forcepoint
Atos	Cato Networks*	Data#3*	Fortinet*
Aussie Broadband*	CC Solutions	Datacom Group Ltd.	FPT Vietnam
Axians	CDW*	Deutsche Telekom*	Fujitsu

Invited Companies

If your company is listed on this page or you feel your company should be listed, please contact ISG to ensure we have the correct contact person(s) to actively participate in this research.

Globalgig*	Intervision	Maxis	Open Systems*
Globe Telecom	Intuitive Systems and Networks (ISN)	MetTel*	Orange Business Services*
GTT*	Intuitorit	Microland*	Palo Alto Networks*
Happiest Minds	Juniper Networks	Mphasis*	Peplink
HCLTech*	Kerv	nacXwan	Pica8*
HPE Aruba*	Korea Telecom	Natilik	PLDT
HPE*	Kyndryl*	Neos Networks	Prodapt
hSo	L2X Tech	Netconsulting	Protos Networks*
Huawei	Lancom	Netskope	PT XL
Hubify Limited	Logicalis*	Nexion Networks*	Rakuten Mobile
IBM	LTTS	Nokia Networks*	Redcentric*
Inde	Lumen*	Nomios	Reliance Jio Business*
Indosat	M1 (Keppel Ltd.)*	NTT DATA*	RIEDEL Networks
Infoline Tec Group Berhad	Macnica	Nuvias	Riverbed
Infosys*	Macquarie Telecom*	Onecom Limited (UK)	SAS Global Communications

If your company is listed on this page or you feel your company should be listed, please contact ISG to ensure we have the correct contact person(s) to actively participate in this research.

* Rated in previous iteration

Sencinet	Tech Mahindra*	Vietnamobile Vietnam
Singtel/NCS/Optus*	Telefónica	Viettel Vietnam
SK Telecom	Telekom Malaysia*	VMO2B*
Smartfren Telecom	Telkom Indonesia	VMware*
Softbank	Telstra*	VNPT Vietnam
Softcat	Terago	Vodafone*
Sonic Wall*	Time dotCom	Vonex
Spark New Zealand	T-Mobile*	Wavenet
StarHub*	TNF	Windstream*
Stream Networks*	TPG Telecom	Wipro*
Superloop Limited (Australia)	TPX	World Wide Technologies
Syringa networks	True corporation	Zensar*
Talari Networks*	UST	Zscaler*
Tata Communications*	Verizon*	
TCS*	Versa	

About Our Company & Research

ISG Provider Lens

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

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

ISG Research

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

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

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

ISG

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

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

For more information, visit isg-one.com.

iSG Provider Lens™

JANUARY, 2025

BROCHURE: NETWORK – SOFTWARE-DEFINED SOLUTIONS AND SERVICES