

# Network — Software Defined Solutions and Services

## Managed SD-WAN

A research report comparing provider strengths,  
challenges and competitive differentiators

Executive Summary 03

Introduction

Definition	11
Scope of Report	12
Provider Classifications	12

Appendix

Methodology & Team	22
Author & Editor Biographies	23
About Our Company & Research	24

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Managed SD-WAN 14 - 20

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

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**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.



**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


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



 Provider Positioning

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




 Provider Positioning

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






 Provider Positioning

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



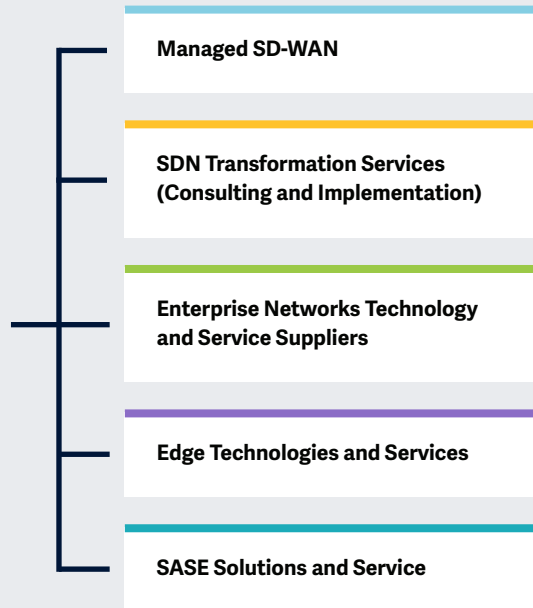
 Provider Positioning

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



# Analysis of Enterprise Networks Solutions and Services 2023.

Simplified Illustration Source: ISG 2023



## 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.





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# Managed SD-WAN

### Who Should Read This Section

This report is relevant to enterprises across all industries in the UK for evaluating providers that offer managed network services (primarily enterprise SD-WAN or hybrid MPLS /IP WAN).

The quadrant report highlights the network service and solution proficiency of selected providers, enabling enterprises to select the right partner for network transformation.

The pandemic has been one of the macro forces that shaped the needs of modern organisations, driving the necessity to adopt digital technologies, such as the cloud and mobility services, as well as technologies such as AI and ML. Together with network innovations such as 5G, SD-WAN and Wi-Fi 6, the gamut of solutions offered by the technology developers and system integrators has driven the market to make the network more consumable. Consistently, network as a service (NaaS) has evolved from the typical bundling of services around LAN, WAN and SDN, together with IT components and circuits, to a more holistic set of services, including

multicloud strategies and software-defined everything (SDx). SDx has eventually emerged as the form factor for network-oriented innovations. As a result, policies and relevant personas can be applied to manage the network and measure its performance. Thus, the network can function fundamentally in a new way to achieve the desired business outcome, and it can be metered on a consumption basis and scaled up and down flexibly.



#### IT and network management leaders

should read this report to understand the providers' landscape and their technical and integration capabilities.



#### Digital transformation professionals

should read this report to understand how managed SD-WAN service providers fit their enterprises' 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 consulting and other SD-WAN service providers' delivery.



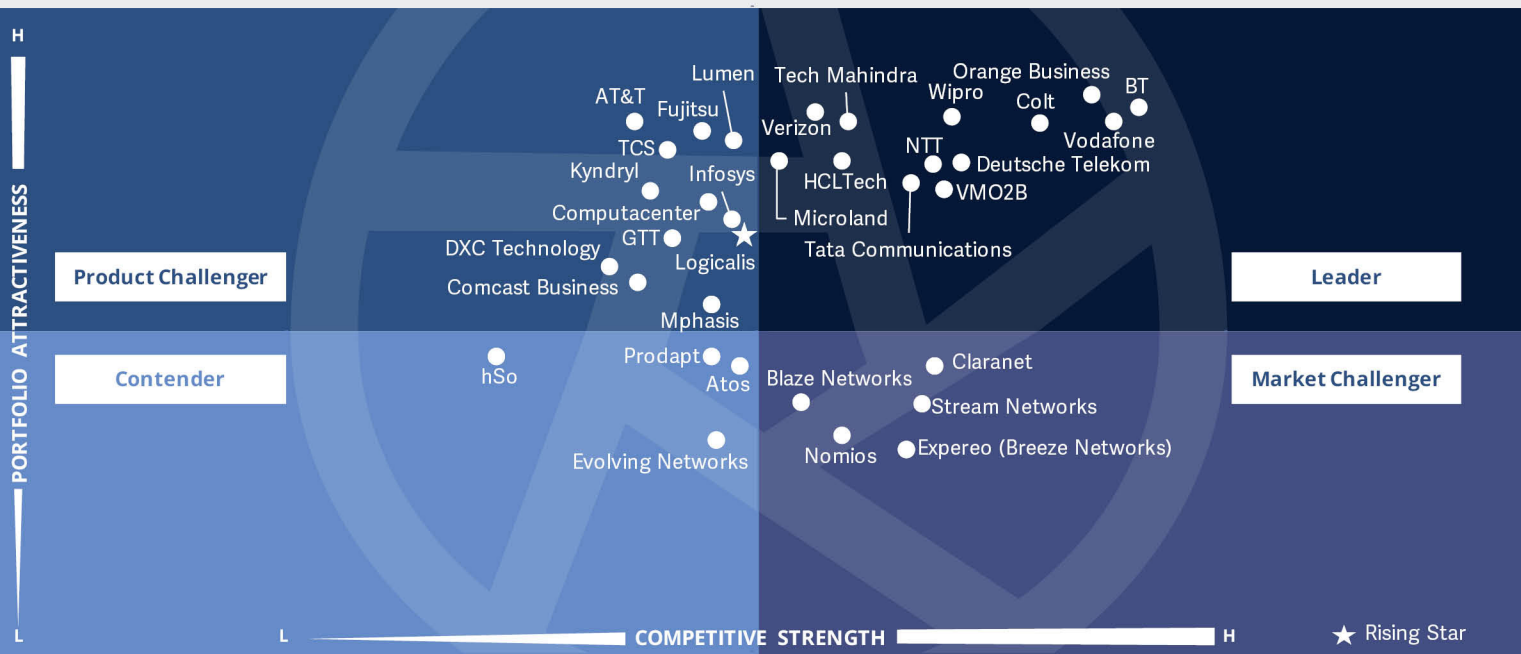
**Procurement professionals** should read this report to learn more about managed SD-WAN service suppliers' terms around SLAs and KPIs, including service and quality levels and pay-as-you-consume options.



**ISG** Provider Lens™  
 Network - Software Defined Solutions and Services  
 Managed SD-WAN

Source: ISG RESEARCH

U.K. 2023



This quadrant assesses the providers of **enterprise SD-WAN** and modern or next-generation networks that deliver managed solutions and associated services to enterprise clients to enable innovative and next-generation networking.

Avimanyu Basu



## Managed SD-WAN

### Definition

This quadrant examines the providers of enterprise WAN (primarily enterprise SD-WAN or hybrid multiprotocol label switching MPLS/IP WAN) that deliver managed solutions and services. These include additional associated services, such as identity and access management (IAM), provided as wrap-around services directed towards streamlining enterprises' network operations. These may include new installations, replacement or upgrade installations, or hybrid cloud pathway installations accounted as networks.

SD-WAN offers the benefits of software-defined technology over traditional hardware-based networking. It is an overlay architecture with a networking foundation that is easily manageable compared to legacy WANs, essentially moving the control layer to the cloud and centralising and simplifying network management. This overlay design abstracts software from hardware, enabling network virtualisation and making the network more flexible. An SD-WAN architecture reduces recurring network costs, offers network-wide control and visibility, and simplifies the

technology with zero-touch deployment and centralised management. The key aspect of an SD-WAN architecture is that it can communicate with all network endpoints without the need for external mechanisms or additional protocols. Suppliers have been increasingly active as managed service providers, offering complete managed SD-WAN solutions to enterprises (including hybrid MPLS/IP or MPLS/SDN solutions) and white-label products to telecom providers or integrators, as part of their broader strategic implementations.

### Eligibility Criteria

1. **Scope of product/service managed WAN portfolio**
2. **Ability to deliver and manage** all hardware and software aspects
3. **Ability to rearchitect** (as required) the existing MPLS-based WANs into hybrid-WAN systems
4. **Management capability** for the needed orchestration and control of the overall architecture
5. **Flexibility** and ease in introducing new services and deployments
6. **Stability** and roadmap planning
7. **Reference** customer/site volume in deployment
8. **Competitiveness** of offerings and types of commercial terms



## Managed SD-WAN

### Observations

In 2022 there was an accelerated move to digital at scale from an enterprise perspective. Companies focused on moving to a cloud-driven network undertook ambitious movements to execute certain phases of cloud transformation, driving the adoption of software-defined everything (SDx) across the spectrum of network technologies. The transformation in the software-defined and cloud-first transformation space has evolved due to the M&A amongst market participants and the expansion of worksites. For instance, the presence of new plants for manufacturing organisations or new offices for banks or retail players expands the required infrastructure footprint. During M&A activities, budgets are often rerouted to align with the merged entity's growth strategy. These are inclined towards having a cloud-first, cost-saving approach to move to a low latency, high throughput model. The quadrant reflects last year's IPL analysis, with those leaders remaining in the top-right segment and the Rising Star advancing into the Leaders' quadrant as expected. A new Rising

Star has been identified for 2023 due to the company's reinforced portfolio and increasing influence in the market.

From the 74 companies assessed for this study, 34 have qualified for this quadrant, with 13 being Leaders and one Rising Star

#### BT

**BT's** key value proposition has been to securely deliver SD-WAN services across the U.K. at speed and scale. The company partners with leading SD-WAN vendors to provide the most effective technology based on client requirements.

#### colt

**Colt** has successfully converted several IP-VPN customers to SD-WAN. The Colt SD-WAN stack covers all network connectivity, including compatibility with 3G/4G/5G and seamless connectivity with MPLS or the internet, providing a multiaccess experience to customers.



**Deutsche Telekom** is proficient in offering end-to-end SD-WAN managed services to customers, covering modular overlay services based on global, top-line vendors and integrated overlay and underlay services with one SLA based on Cisco SD-WAN and Cisco edge devices.

#### HCLTech

**HCLTech** is a trusted network service integrator that partners with different vendors and provides vendor-agnostic solutions. This helps enterprises customise their WAN environment to their infrastructure, workload and branch distribution.



**Microland's** vendor-agnostic strategy in the network services spectrum is reinforced by its ability to offer services with integrated security. The company has capabilities across several products based on appliances, white box, software, cloud and on-premises offerings.



**NTT** identifies and mitigates client network issues and manages multivendor network infrastructure, including SD-WAN, LAN, IP telephony, application acceleration and security devices, with a layer of predictive analytics, which scans log and event data generated by the network.



## Managed SD-WAN



**Orange Business**' flagship solution, Flexible SD-WAN, is a full-spectrum solution that instills automated, intelligent network features with on-demand virtualised services centrally orchestrated for optimal performance and control.



**Tata Communications**' proactive network monitoring is powered by its proprietary TCX platform analyses and correlates the underlay and overlay data. This correlation and discovery mechanism automatically raises tickets during a breach of the predefined threshold.



**TechM** has adopted a strategy of being the chosen provider for telcos, where they are the front end whilst TechM builds and manages the products. The company has also progressed to the exploratory stages of building satellite PoCs.



**Verizon's** key value propositions revolve around unique novelty offerings such as SD-WAN integrated with 5G, SD-WAN 2.0 intelligent routing and VNF capabilities, and integration of SD-WAN with multi-access edge computing (MEC) capabilities.

### Virgin Media O2 Business

**Virgin Media O2 Business** provides SD-WAN powered by leading platforms and presents a sizeable U.K. market share. The company reinforces the offerings with higher integration and process levels between its SD-WAN solutions and secure access service edge (SASE) services.

### Vodafone

**Vodafone** has increased its focus on cloud connectivity and invested in several innovative cloud solutions. The company connected several cities to various cloud connectivity service providers.



**Wipro** has begun offering its SD multicloud networking services to some of its large customers. These services are being developed in tandem with industry cloud service integrations.



**Logicalis** (Rising Star) crafted its SD-WAN, powered by Cisco to meet the business requirements of various enterprises, delivering high performance for critical applications without compromising security.



# HCLTech



“HCLTech facilitates auto-remediation of network issues, reducing issue resolution time and improving application performance.”

Avimanyu Basu

## Overview

HCLTech is a multinational IT service and consulting company based in Noida, India, with a revenue of \$12.59 billion (2022). It has a presence in 60 countries, including countries in the U.K., where it supports many enterprise clients with network services, solutions and transformation. The company has a proprietary SD-WAN framework synergising out-of-the-box SD-WAN solutions with a set of edge and network on-demand services. Some salient features include AIOps-driven intelligent orchestration bundled as a pay-as-you-go service model.

## Strengths

### Shifting to a software-based network functions with proprietary universal customer premises equipment (uCPE):

HCLTech has developed its uCPE, which is open hardware, platform and software. The open hardware provides the flexibility of selecting any hardware and subsequently for platform and software, which the company provides. It also includes the presence of a hypervisor and options orchestrator. The solution provides options for the microservices and the software, thus, supporting network elements such as routing, firewall and wireless LAN controller from any vendor. This enables an agile environment and supports the egress of private 5G, which can lead to the depletion of the wired network.

## Extensive network-as-a-service (NaaS)

**offering:** HCLTech has partnered with Cisco Capital and HPE Green Lake, specifically HPE’s proposition around NaaS. The company has received validated frameworks around NaaS deployed in customer environments as use cases. HCLTech is also working with Verizon around NaaS to create the bill of materials (BOM) for all its customers’ technologies. The company enables customers to transform their assets into a NaaS model, which they can offer to their internal departments with uCPE on a private cloud. Thus, the assets are on customer books, and HCLTech maintains and operates them on the customer’s behalf.

## Caution

The managed services space in the U.K. is witnessing an increasing presence of several small-scale and niche service providers. HCLTech will need to innovate continuously and engage with local partners to retain its leadership position in the U.K.





# 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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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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