ISG Provider Lens™

Network — Software Defined Solutions and Services

Enterprise Networks Technology and Service Suppliers

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

HCLTech

QUADRANT REPORT | JUNE 2023 | U.K.

Table of Contents

Report Author: Avimanyu Basu

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

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

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

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

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

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

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

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

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

Integration of AIOps and ChatOps-enabled functionalities: Whilst there has been significant work on the AIOps front in networks, and several pilots have taken place, adoption at scale is still minimal. Service providers and system integrators have expressed their interest in working with enterprises to scale these technologies. However, ISG has found instances where service providers have provided enterprises with automation- and AIOps-driven services that are anchored by the Zero Trust security framework and guided by service intelligence that improves network performance through real-time analysis. Microland, for example, has developed the Intelligeni platform, which has in-built AIOps and ChatOps capabilities that give it a self-healing network architecture. It also has features, such as AI-based anomaly detection, knowledge graphs-based dependency mapping, observability and performance dashboards.

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

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

Page 1 of 5

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

Page 2 of 5

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

Page 3 of 5

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

Page 4 of 5

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

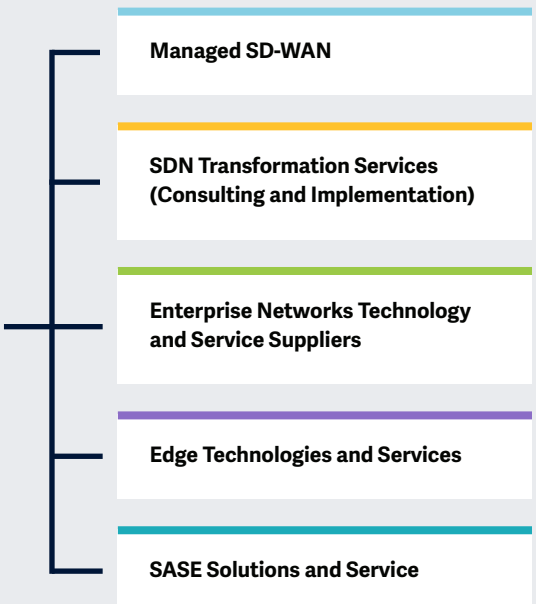
Provider Positioning

Page 5 of 5

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

Analysis of
Enterprise Networks Solutions and Services 2023.

Simplified Illustration Source: ISG 2023



Definition

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

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

Scope of the Report

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

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

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

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

Provider Classifications

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

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

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

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

Provider Classifications: Quadrant Key

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

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

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.

Enterprise Networks Technology and Service Suppliers

Who Should Read This Section

This report is relevant to enterprises across all industries in the UK for evaluating suppliers of SD-WAN equipment and services .

In this quadrant report, ISG lays out the current market positioning of enterprise network technology and service suppliers in the UK and how they address the key challenges faced by enterprises in the region.

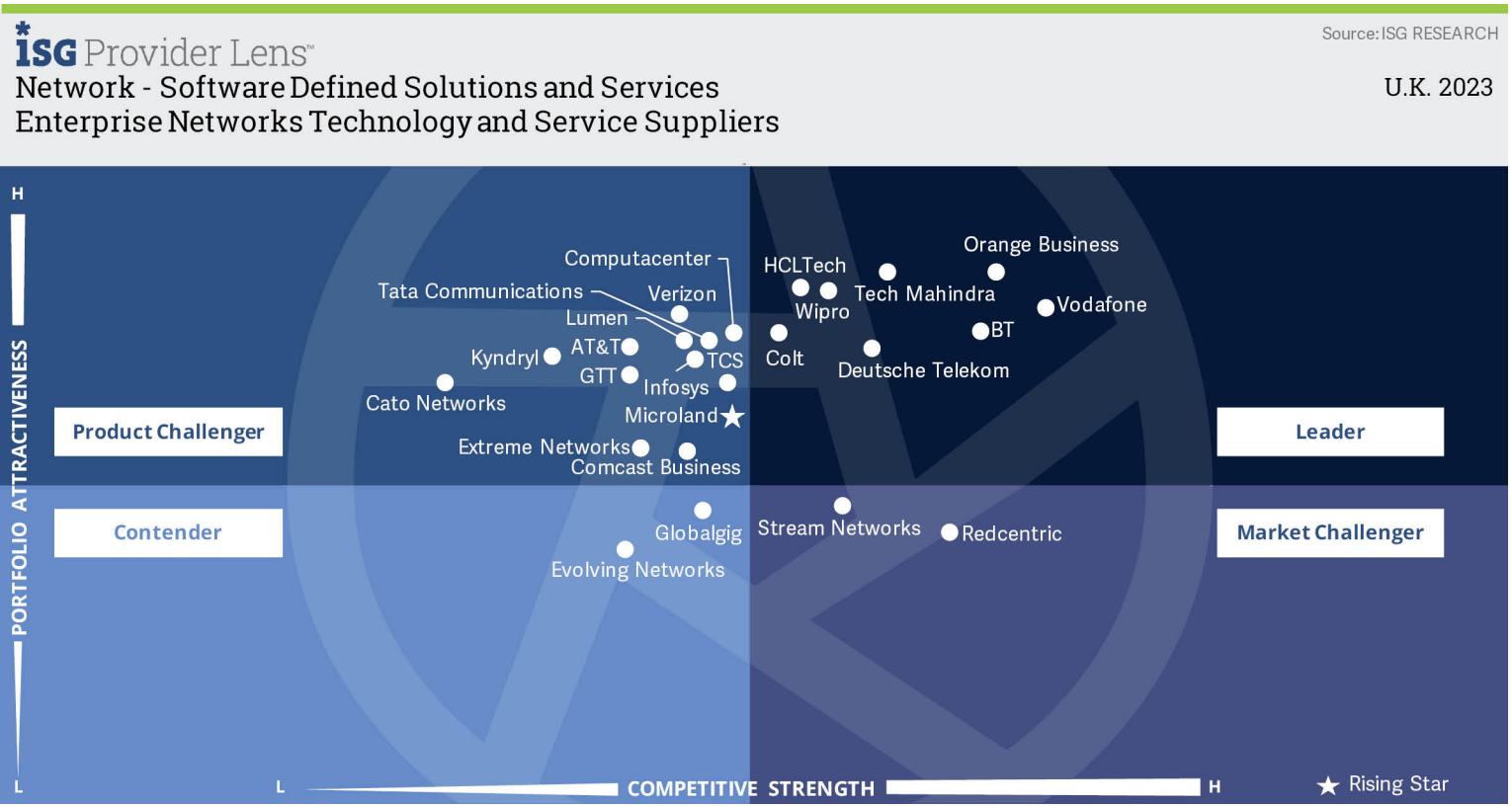
Some of the customers are inclined towards the pay-as-you-go model, such as a cloud-like consumption of the network. They tend to look at the overlay and underlay separately from a commercial model, and, thus the overlay is considered a common fabric across their global footprint. However, the underlay comes from various providers enabling enterprises to leverage the best technology. Customers tend to look at a common fabric and engage service providers and system integrators to provide the services . Hence, they want a common provider to manage the underlay. Thus, managed services engagements are being integrated with the overlay and underlay transformation elements. It provides the network with the best available bandwidth at optimal cost. Thus, managed services are offered as a part of the overlay (typically termed Bring Your Own Network) where TCL manages third-party networks or access, which are included in the portfolio as part of the offering. Service providers have been involved in several contracts that give them the authority to manage the third-party interface holistically. The service providers have effectively identified these dynamics and the company has planned its roadmap to change its portfolio and reposition itself in the market.

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 services 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 as well as pay-as-you-consume options.



This quadrant analyses providers of **SD-networking core-to-edge technology and services** purchased for **the enterprise's own operations (DIY)**, including **management systems and end-device control**, from the central core to distributed edge.

Avimanyu Basu

Definition

This quadrant analyses providers of software-defined networking from core to edge technology and services, purchased by either service providers for specific projects or enterprises for their operations or equipment delivery. This includes SD-WAN implementations or partial implementations, which do not include managed services. It includes specific OSS/BSS solutions, SD-LAN, 4G/5G mobility-targeted services or solutions, applications, management systems and methods, including software-defined networks' end-device control and management. These can be integrated into an enterprise's SD-WAN strategy from the primary enterprise location to branches or remote office locations.

SD-WAN is virtual and allows enterprises to bundle multiple WAN technologies and equip themselves with the required bandwidth. It determines the transmission path for data packets and the medium to be used; if a connection has excess load, an alternate path is automatically taken. The virtual connections consist of multiple paths that are used simultaneously, along with core network functionality. One of the key aspects of the architecture is that it can communicate with all network endpoints, allowing ease in branch and remote setup and management.

Suppliers have been increasingly active in selling SD-WAN solutions to enterprises for their DIY (non-managed) implementations and are partnering with licensed telcos or service providers in this space. In addition, many suppliers focus on specific discrete parts of the overall network (for example, OSS/BSS) and supply just these components or similar discrete, partial solutions.

Eligibility Criteria

1. Product **portfolio coverage**, focus areas, completeness of modular delivery and integration with broader solutions
2. **Ability to deliver** equipment and service to customers, including requisite training
3. Ability to deliver **value-added services** within a modern enterprise environment using software-defined methods
4. Understanding of the **overall market**, technology environment and evolutions and **contributions** to the same
5. **Scope of partnerships and offerings** and management capability of a customer project
6. Openness of offerings to **avoid vendor lock-in**
7. Reference customers or **solutions** post POC or pilot **in commercial deployment**
8. Competitiveness of offerings and types of **commercial terms,** such as shared risk models

Observations

As enterprise business goes fully digital and voice gradually becomes less important, service providers are structuring roadmaps resonating with this trend. To support new-age use cases such as IoT, cloud augmentation is critical and is intertwined with effective edge computing. Cloud connectivity is growing and gradually becoming strategically important to enterprise networks. As enterprises move workloads to the cloud, especially in multicloud environments, service providers are structuring their offerings to help customers connect to and establish connections between clouds. This has reinforced the focus on the fixed connectivity portfolios of service providers. As enterprises move away from dependence on data centres, public cloud infrastructure is gaining significant traction, with enterprises leaning towards SaaS applications. Consequently, the WAN architecture has become considerably cloud-centric, but a thin line of differentiation still exists between cloud-centric networks and SD-WAN.

The leaders in this quadrant resonate with the inclusions last year, excepting a few exclusions from the grid itself as the market participants were not visible enough in the competitive landscape. An inclusion in the leadership reflects the company's ramp-up in the 360-degree network services portfolio.

From the 74 companies assessed for this study, 25 have qualified for this quadrant with eight being Leaders and one Rising Star

BT

BT's strategy in NFV/uCPE is directed towards helping customers scale in virtualisation, offering them choice and expanding on the use cases. It has also added capabilities in terms of supported hardware platforms for NFV and uCPE.

colt

Colt has rolled out a 5G-focused solution based on Blue Wireless using Cradle Point CPEs (dedicated CPEs for providing 5G access) for its SD-WAN customers, enabling 5G network wherever available.

Deutsche Telekom has proven technologies and has been a reliable partner with in the pandemic and post-pandemic periods. This further reflects that the company prioritises CX and ensures seamless communication across a network throughout the phases of transformation.

HCLTech

HCLTech is one of the first system integrators in the enterprise networks segment to conceptualise self-healing networks. With Nucleus, the company has created an engine for automatic detection and automatic notification of faults and device/network failures.

orange Business Services

Its telco DNA has enabled **Orange Business** to realise the significance of core transformation and contribute to the fundamental transformation of legacy systems.

Tech Mahindra has been one of the frontrunners in NaaS implementation, providing LAN as a service, modernising customer infrastructure on SD-Access and integrating the data centre components and offering them as a service.

Vodafone

Vodafone has been transforming continuously to remain relevant in the networking space and to meet evolving customer requirements. Its ever-evolving network technology and managed services portfolio reinforced with cloud capabilities, a sharpened focus on UX, and an expansive partner ecosystem has been the hallmark of Vodafone's strategy.

Wipro has been at the forefront of innovation associated with intent-based networking, benefitting enterprises with a ready-to-deploy offering for the autonomous network of the future.

Microland's (Rising Star) NAP enables clients to implement business activities and enhance scalability effortlessly by proactively managing the network architecture and improving UX.

Leader

"HCLTech provides several network services for enterprises driven by in-house frameworks and platforms."

Avimanyu Basu

HCLTech

Overview

HCLTech is a multinational IT service and consulting company based in Noida, India. The company provides a wide range of services and solutions across the enterprise network ecosystem. It delivers its value proposition through a set of proprietary platforms and frameworks that drive automation and provide transparency for effective network management. HCLTech has experienced significant traction in SDN from the data centre front, and it has accordingly designed the Sensus framework, which spans every stage of data centre network transformation. Furthermore, the consultative wrap-around on offerings drives resolution of enterprise painpoints in a multitude of ways.

Strengths

Dedicated program on human capital development driven by product management and COE groups: HCLTech has established the Network Academy, which focuses on skill development to empower resources across cutting-edge technologies, keeping them relevant to the dynamically changing market. The program partners with OEMs such as Cisco, VMware and Fortinet, intertwining with HCL's internal skill development programs and select academic institutions.

Plethora of productised offerings enabling holistic services: Offerings such as NetBot (network automation framework), Census (SDN framework covering end-to-end data centre, network transformation) and Transport Independent Site (TIS SD-WAN framework) have already been adopted widely. Its recently launched TIS 2.0 architecture entails a more comprehensive modular structure. The Nucleus platform drives campus network transformation and SD access. HCL's Nlighten is an assessment service specifically crafted to use as a single transaction to deliver a detailed snapshot of the existing network infrastructure. This is a vital step for companies planning business transformation and digitization to improve their current network infrastructure and understand their network readiness. It has been reinforced with different modules to fortify its consulting aspect with dedicated architectures, delivering SD-WAN consulting, Private 5G consulting and IoT consulting. Lastly, the company's IT/OT integration framework integrates the OT environment with the corporate IT environment that extends to the data centre through the cloud and provides real-time visibility and control and drives automation.

Caution

Most of HCLTech's clients are from the multinational segment. The company is yet to develop strategies to tap into the SMB market. Thus, it may be missing out on opportunities from this segment because the company focuses largely on multinationals 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.

Lead Author:
Avimanyu Basu

Editor:
Poulomi Nag

Data Analyst:
Hema Gunapati

Quality & Consistency Advisors:
Pierre Puyraveau, Yadu Singh, Jon Harrod, Phil Hugus and John Lytle

Project Manager:
Ankur Taneja

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 March 2023, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

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

The study was divided into the following steps:

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

Lead Author

Avimanyu Basu
Distinguished Lead Analyst

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

IPL Product Owner

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

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

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

ISG Provider Lens™

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

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

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

For more information, visit isg-one.com.

ISG Provider Lens™

JUNE, 2023

REPORT: NETWORK — SOFTWARE DEFINED SOLUTIONS AND SERVICES