ISG Provider Lens™

Network – Software Defined Solutions and Services

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

Virgin media O2 Business

QUADRANT REPORT | JUNE 2024 | U.K.

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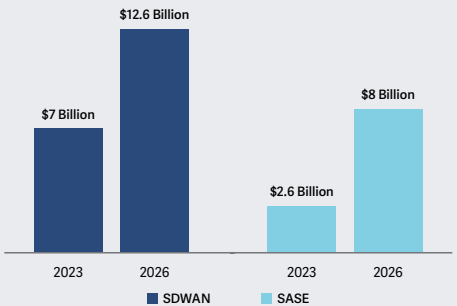
SD networks continue to align technologically in a hybrid WAN, multi-vendor and multi-cloud environment and support broad organisational transformation

Digitalisation has witnessed a significant surge in the last 15 years with increased adoption of digital technology and the growth of data, devices, cloud computing, linked endpoints and storage. Meanwhile, network innovation spending and network capacity have increased to a certain extent. Spending on upgrading and network capacity is being surpassed by digitalisation efforts brought about by AI, generative AI (GenAI) and automation. Further investments in network modernisation will be necessary to close the gap in a sustainable way, which can primarily be supported via software-defined networks. In simple terms, software-defined networking (SDN) is a well-known architecture that decouples the network control and forwarding functions, enabling the direct programming of network control and the abstraction of the underlying infrastructure for applications and network services via software. SDN is an architectural model that can align network infrastructure more effectively with the requirements of application workloads. This is accomplished through automated provisioning, programmatic network management, application-oriented and network-wide visibility, and seamless integration with cloud orchestration platforms, resulting in faster operations.

Within the B2B enterprise ecosystem, communications service providers (CSPs), network service vendors and systems integrators (SIs) leverage SDN to help optimise the delivery and orchestration of virtualised services on an on-demand basis, improve service agility and accelerate service activation. All these are integral to how networks are intelligently routed and securely connected at the branch with VPNs.

Managed and co-managed SD network deployments comprise the majority of UK implementations.

Relative Growth of Global SD-WAN and SASE Market, Q1 2023 - Q4 2026



Source: ISG Software-defined networks research

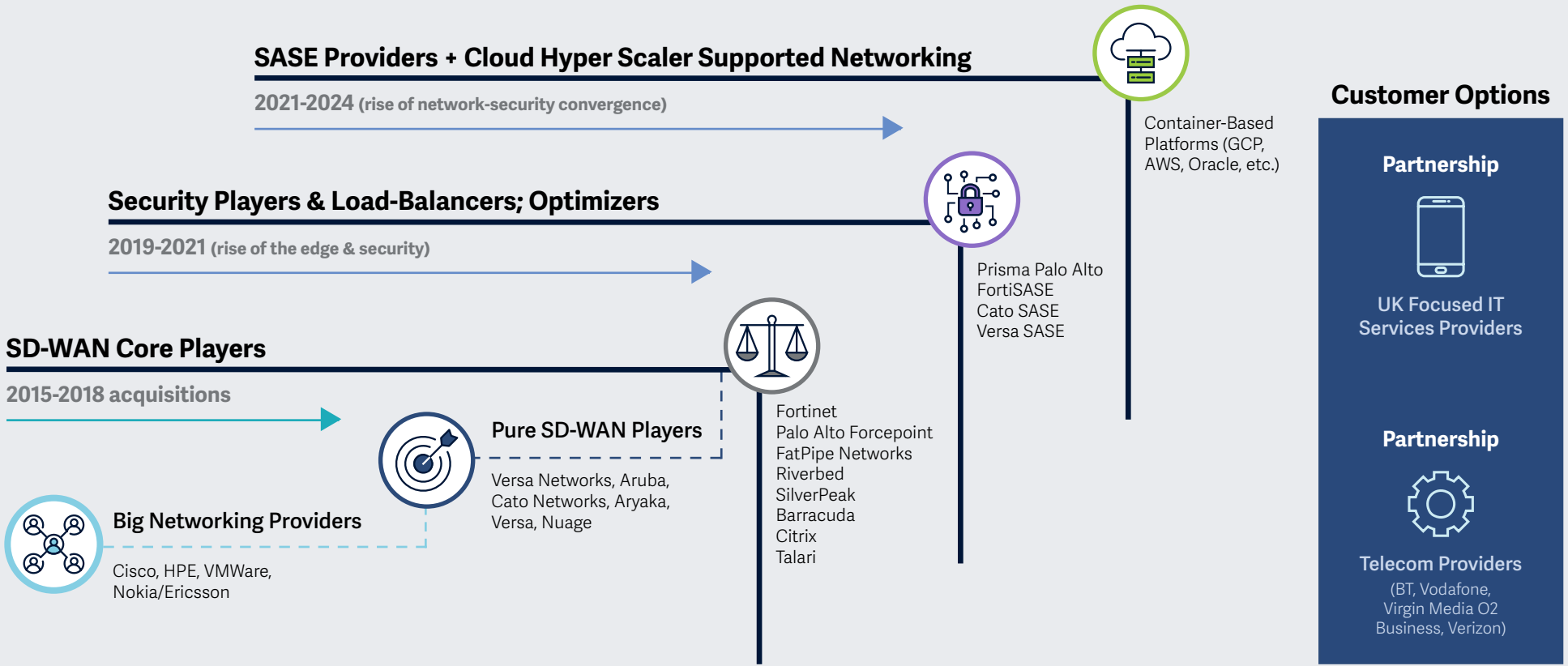
The realm of networks and software-defined solutions and services encompasses a wide range of technological subjects, industry and organisational areas, and business process methods. It is closely linked to the

transformation related to digitalisation, advanced security and cloud or multicloud adoption trends observed across enterprises worldwide. With SDN, web scaling for hyperscalers, private or hybrid cloud deployments, network customisations with segmented vLANs and multipath networking across WANs and LANs is also possible. Joint ventures, partnerships and mergers are key to navigating the complexities and ever-changing customer requirements in the SDN space. This study by ISG Provider Lens™ examines various network services and solutions related to SDN, specifically in the UK. These offerings include managed software-defined wide area network (SD-WAN) services, SDN transformation services, edge technologies, including associated SD-LAN and private 5G mobility technologies and services, and secure access service edge (SASE).

British businesses have faced challenges stemming from Brexit, supply chain disruptions, productivity slowdown, the increased significance of local and global environmental, social and governance (ESG) regulations and the long-term impact of the COVID-19 pandemic, such as high inflation, persistently high interest rates, and shortage of labour and skills driving the need for remote/hybrid work. The rising energy and transportation costs, largely due to the current geopolitical situation, have also considerably impacted the UK organisations' operations and cost structures. As a result, the firms in the UK. are now actively seeking innovative solutions to improve overall enterprise operational efficiency and architectural dexterity – especially in how they securely connect their global sites/plants, workers, partners and suppliers.

A few notable drivers of the current market growth in the UK, as seen in many other countries, are the offerings from system integrators together with their partner ecosystems, in competition with the SD-WAN offerings by traditional network service providers that include broadband players, CSPs as well as wholesale network providers. Enterprises operating in Western Europe spend approximately a quarter of their private networking budget on SDWAN, followed by MPLS/IP VPN (22 percent), Ethernet VPN (14 percent), Ethernet private lines (12 percent) and private wireless (12 percent), as per ISG's Networking Survey from 2023. At the same time, within the UK, enterprises are increasing their share of WAN connections that are public internet-based and also leverage private fibre networks of major public cloud providers. Furthermore, SMEs across various industries are accelerating their adoption of SD-WAN, but only a few providers focus on this market. The increasing share of wireless connections at the expense of fibre is also a trend witnessed in the UK. British enterprises are increasingly focused on incorporating highly secure and advanced technologies into their corporate networks, including big data, edge computing, SASE, mobility (such as private 5G networks supported by Ofcom regulations), IoT and hybrid cloud platforms, with a greater emphasis on AI/ML and open source SDN solutions. The UK firms are also more risk-taking in technological adoption than their European counterparts.

Across the UK, enterprises are implementing different strategies to reduce costs while enhancing agility, flexibility, competitiveness, security, remote working capabilities and business continuity practices, ultimately leading to an improved customer and user



experience. Major challenges in achieving these goals lie in using technology, integrating hybrid networks, budget concerns, skills shortage and transforming established processes and management practices, including potentially moving away from the managed and operated in-house (DIY) model to the supplier-managed or as-a-service (aaS) model.

Existing routers, switches, or virtualised or universal customer premises equipment (vCPE or uCPE) can be kept and repurposed in SD-WAN deployments, which function as an overlay. This can save money and prevent the need for a complete rip-and-replace scenario. Compared to many legacy enterprise networks, SD-WAN can manage a variety of connection types, segment and secure traffic flowing via the WAN, and report on operation outcomes in a modern and straightforward manner. Improving network performance with security, enabling zero-touch provisioning at remote sites that ease network scaling, and reducing time to identify anomalies are some drivers for deploying observability and automation platforms. When SD-WAN is used as a managed or co-managed service, dashboards or single pane of glass reports that are clear and easy to read can be produced. These reports can also be highly automated, matching the providers' agreed-upon criteria to the enterprise's overall business roadmap needs. Beyond the agreed SLAs, businesses are also evolving towards managed SD-WAN with zero disruptions and guaranteed outcomes.

Further, many enterprises are increasingly adopting SD-WAN as part of a comprehensive SASE solution, often procuring it as a fully managed SASE service from a managed services provider. SASE represents the point at which enterprise networking and security fully converge and integrate SASE components for a holistic and automated security posture which adheres to privacy and compliance needs UK enterprises benefit from experienced industry advisers who deeply understand the region, technology, enterprise scale, business objectives and industry-specific implications. A wide range of mature, competent and experienced regional advisory and provider companies offer such services that enable network extension, improvement in bandwidth and enhancement in security posture with performance monitoring. The diagram below depicts the evolving nature of SD-WAN, SASE and security vendors in the UK market with a focus on *who owns the customer*.Several key factors are driving rapid changes in enterprise networks in the UK. These factors can be summarised as follows.

- **Choosing managed or co-managed services:** By offering fully managed or co-managed services, SDN-enabled solutions lower overall costs and deployment risks. These services also allow businesses to quickly and effectively respond to customer concerns and automatically offer new services as needed, thus improving the customer experience and offloading strain and complexity for internal users, thus enhancing the user experience. The enterprises operating in Western Europe remain ahead of the US in terms of completely choosing managed services from third parties as per ISG's Networking Survey 2023. A sizeable chunk of the enterprise network market in the UK is still moving away from DIY solutions to co-management or a fully managed state.

- **Improving network security:** Enterprises in the UK continue to highly prioritise network security, expecting and demanding extensive, sophisticated security measures from the network's core to the edge. This expectation is met by SD networks, which serve as the basis for complete SASE installations and are especially useful for the secure provisioning of cloud-based and hybrid networks. Micro-segmentation, advanced threat detection and response, DLP and convergence with secured edge are some ways enterprises demand more from SASE transformations.

- **Increasing flexibility and streamlining management:** Enhancing network resource integration, automation, security, orchestration and administration are top priorities for businesses in the UK. Using SDN with centralised orchestration and management systems and more

straightforward dashboard reporting are examples of this. As per ISG's Networking Survey 2023, enterprises with operations in Western Europe prefer a technology leader that is easy to do business with and one that offers flexible and scalable offerings.

- **Reducing the cloud and multicloud migration risks:** 73 percent of enterprises having operations in Western Europe preferred having cloud managed networking services as opposed to in-house management as per ISG's survey. British businesses are continuing to rapidly move their network and IT operations to the cloud or multicloud environment. SD networks have a well-established track record of assisting in minimising risks and complexity when moving to single or multicloud environments.
- **Power of the SME SD-WAN market:** The robust SME market in the UK is quickly adopting SD-WAN technology. These SMEs primarily rely on cloud-based solutions for communication and collaboration, and they frequently have distributed workforces and hybrid work structures. Through provider partner ecosystems, low-cost SD-WAN solutions are often utilised to connect to cloud and security providers. However, not all the leading SD-WAN providers in the UK serve this market; many continue to concentrate on the large, multinational enterprise segment.
- **New technology frameworks reduce risks** When it comes to new technologies, many British businesses take more chances than their counterparts in the US or APAC. In today's fast-paced environment, investing much time in testing and scenario-proving solutions to achieve complete traditional comfort levels may influence a company's competitive positioning. The use of SD networks in cutting-edge technology areas, such as enterprise digitalisation, intent-based networks, AI- and ML-driven solutions, intelligent edge and edge computing, SD-LAN connectivity and management, and SASE, is now widely documented to reduce implementation risks, achieve business outcomes and mitigate inflationary pressures. However, not many providers use generative AI (genAI) for network topology design, VNF development, simulation of network functions in the cloud, automated network design and simulated attack scenarios. For network environments where data is scarce, providers can further augment synthetic data sets for various network access usage scenarios for efficient planning and management.
- **Transitioning towards SASE plus:** The UK's telecom service providers, network service providers, SIs and their partner ecosystems provide a vast array of SD-WAN and other SD network solutions, including comprehensive end-to-end SD-WAN or SD network solutions. They use SASE solutions throughout all enterprise touchpoints, customised for various enterprise verticals and industries. In the UK, a few businesses have deployed cutting-edge SD network technologies, such as SD-LAN or SD-Wireless LAN, which can be combined with LTE or 5G private solutions for mobility and remote locations. Cloud-native SASE platforms for scalability and agility, secure multicloud connectivity, and partnership with managed security service providers can all enhance security posture, simplify management provide continuous identity verification, proactively mitigate threats, offer data loss prevention capabilities along with data residency options' and improve UX. and improve UX.
- **Convergence of technologies at the edge remains crucial:** Although SDN enables the network to control traffic to allow appropriate latency amidst lower congestion, network function virtualisation (NFV) in enterprises brings hardware independence in transport, providing the necessary scale, security, isolation and load balancing in private 5G networks. 5G at the edge will need to create, monitor, scale, customise, delete and maintain virtual functions with an enhanced control and user plane separation

(CUPS) model, a stateless architecture and a container-based deployment. Network slicing, NFV and multi-access edge computing (MEC) demand deterministic networking, federated learning and zero trust network access from core to edge. These technologies remain critical in deploying next-gen use cases such as digital twins, augmented reality (AR) and virtual reality (VR), as well as vehicle-to-everything applications.

This study examines the evolving market demands in the UK in 2024 and offers a comprehensive overview. It also provides valuable guidance to aid clients in evaluating and assessing the offerings and performance of providers.

SDN delivers advanced and business-critical services, facilitates migrations and reduces the risks associated with migration and deployment of multicloud and SASE solutions. SD-WAN must be considered a vital step in any such transition.

Provider Positioning

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

Provider Positioning

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	Managed SD-WAN Services	SDN Transformation Services (Consulting and Implementation)	Edge Technologies and Services (including Private 5G)	Secure Access Service Edge (SASE)
Computacenter	Rising Star ★	Leader	Not In	Product Challenger
Deutsche Telekom	Not In	Not In	Leader	Leader
DXC Technology	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Evolving Networks	Not In	Contender	Not In	Not In
Expereo	Market Challenger	Market Challenger	Not In	Market Challenger
Exponential-e	Market Challenger	Not In	Not In	Not In
Extreme Networks	Not In	Not In	Product Challenger	Not In
Globalgig	Not In	Not In	Not In	Contender
GTT	Product Challenger	Product Challenger	Product Challenger	Product Challenger
HCLTech	Leader	Leader	Leader	Leader

Provider Positioning

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	Managed SD-WAN Services	SDN Transformation Services (Consulting and Implementation)	Edge Technologies and Services (including Private 5G)	Secure Access Service Edge (SASE)
Infosys	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Kyndryl	Product Challenger	Product Challenger	Leader	Market Challenger
Logicalis	Product Challenger	Rising Star ★	Product Challenger	Not In
Microland	Leader	Leader	Rising Star ★	Product Challenger
Mphasis	Contender	Contender	Contender	Not In
NTT DATA	Product Challenger	Product Challenger	Not In	Product Challenger
Orange Business	Leader	Leader	Leader	Leader
Protos Networks	Contender	Not In	Not In	Not In
Redcentric	Not In	Contender	Not In	Not In
Sonic Wall	Not In	Not In	Product Challenger	Not In

Provider Positioning

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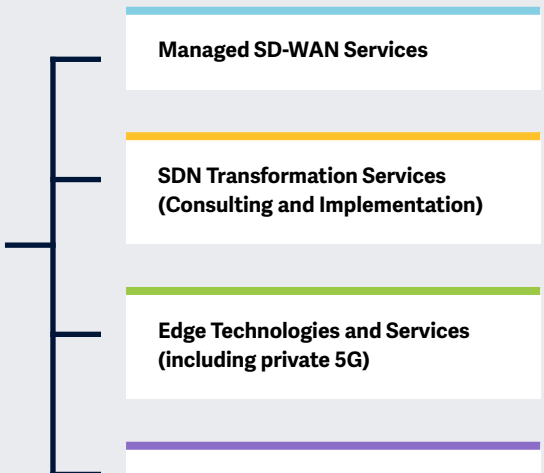
	Managed SD-WAN Services	SDN Transformation Services (Consulting and Implementation)	Edge Technologies and Services (including Private 5G)	Secure Access Service Edge (SASE)
Stream Networks	Contender	Not In	Not In	Not In
Tata Communications	Product Challenger	Not In	Not In	Product Challenger
TCS	Product Challenger	Product Challenger	Product Challenger	Rising Star ★
Tech Mahindra	Leader	Leader	Leader	Leader
Verizon Business	Leader	Product Challenger	Product Challenger	Product Challenger
Virgin Media O2 Business	Leader	Product Challenger	Market Challenger	Leader
Vodafone	Leader	Leader	Leader	Leader
Wipro	Leader	Leader	Leader	Leader

Analysis of **SD-networks, edge and SASE solutions and services 2024** study.



Simplified Illustration Source: ISG 2024

Definition

This ISG Provider Lens™ study, Network – Software Defined Solutions and Services 2024, analyses multiple network offerings related to enterprise networks and software-defined networking. These include managed software-defined wide area network (SD-WAN) services offered to enterprises. These fully managed services leverage the latest technologies and methodologies that are structured within a modern contractual framework. In addition, this IPL study looks at consulting and advisory, supply and implementation support in the SD-WAN area and the providers focused on such offerings. The study also looks at edge technologies and services, such as IoT, universal or virtual customer premises equipment (uCPE or vCPE) and software-defined local area network (SD-LAN), including private mobile network delivery via 4G or 5G technologies and the service offerings related to these segments. The study examines secure access service edge (SASE), which includes SD-WAN within its domain. SASE is an overarching, secure and fully integrated network environment for businesses.
This IPL study may be used in conjunction with the planned Managed Network Services IPL study due for release in Q4, focused on non-SD networks managed delivery.

ISG sets out to deliver a comprehensive research program with a clear and definitive evaluation criterion, covering service providers' and equipment suppliers' developments and deliverables 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 organisations evaluate and assess the offerings and performance of providers.

Scope of the Report

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

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

- Transparency on the strengths and weaknesses of relevant providers/software vendors
- A differentiated positioning of providers by segments (quadrants)
- Focus on the regional market

Our study serves as the basis for important decision-making by covering providers' positioning, key relationships and go-to-market considerations. ISG advisers 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.

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

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

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

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

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

Managed SD-WAN Services

Who Should Read This Section

This quadrant is relevant to enterprises across all industries in the UK for evaluating providers offering managed network services [primarily enterprise SD-WAN or hybrid multiprotocol label switching (MPLS)/IP WAN].

The quadrant aims to spotlight the expertise in enterprise network services and solution proficiency among relevant providers, empowering enterprises to select the right partner for network transformation. Regardless of how network gear and software are combined, these services will be made available to businesses as a service that is fully run by the service provider.

UK enterprises deploying multivendor SD-WAN are consistently facing challenges in terms of high operational costs, varying security standards and skills gaps across different providers. The service providers in the UK focus on offering a consolidated vendor approach to ease managed SD-WAN challenges. Enterprises are also increasingly seeking integrated security as part of the SD-WAN services.

This trend shift towards a security-focused framework is driven by enterprise needs for advanced security measures such as Zero Trust and fabric-enabled security solutions.

UK enterprises are also placing significant emphasis on implementing AI-driven networking services to improve end-user experience within their networks. Thus, service providers are expected to showcase solutions that are equipped with advanced technologies such as AI and ML, where enterprises benefit from network optimisation, agility, improved security, network resiliency and operational efficiency.

Networking professionals should read this report to understand the detailed provider landscape, integration capabilities and partnerships, aiding in effectively managed SD-WAN service consumption.

Operations professionals should read this report to understand how managed SD-WAN service providers align with their business goals across planning, quality control and supply chain.

Cybersecurity professionals should read this report to understand how providers use technologies to tackle security concerns associated with consulting and other SD-WAN services delivery.

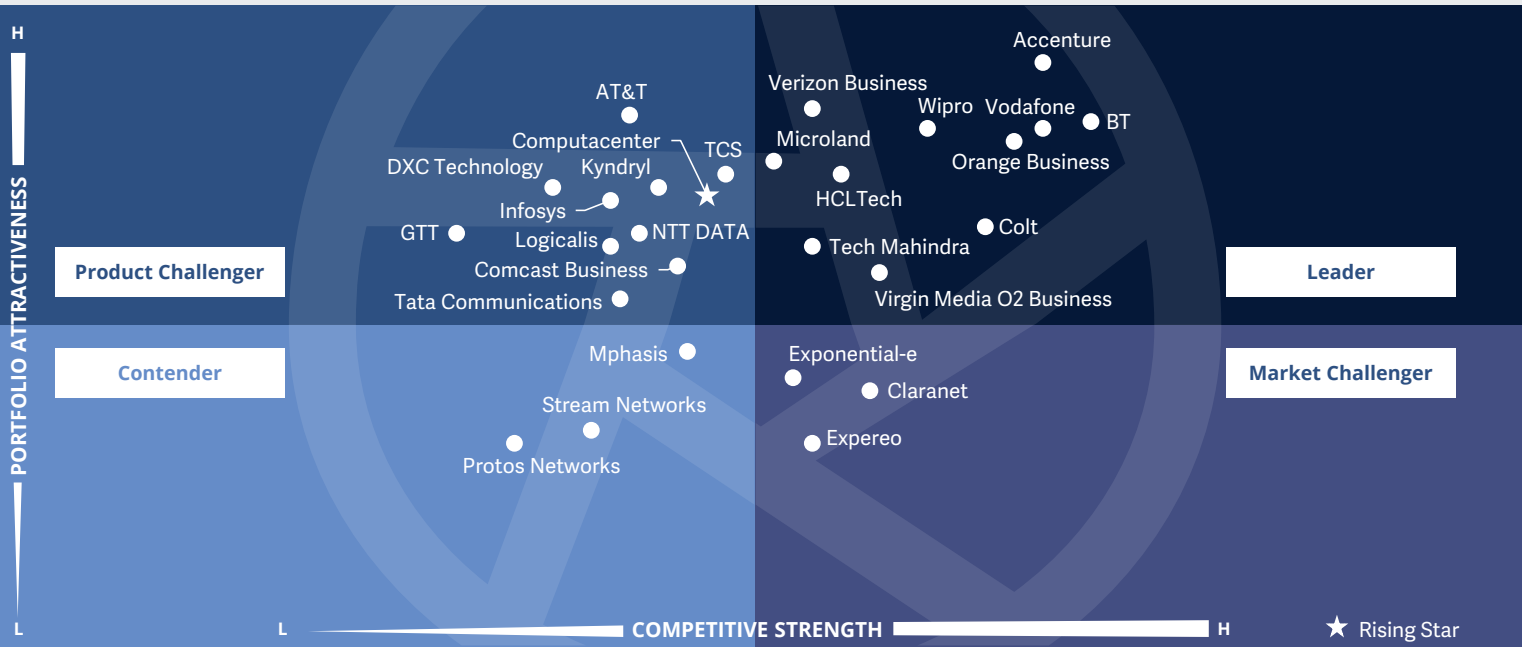
Procurement professionals should read this report to get acclimatised with the managed SD-WAN service providers' terms, covering SLAs and KPIs, including service and quality levels and pay-as-you-consume options.

ISG Provider Lens™

Source: ISG RESEARCH

Network – Software Defined Solutions and Services
Managed SD-WAN Services

U.K. 2024



This quadrant assesses providers offering **managed or co-managed SD-WAN services and solutions** to UK-based enterprises, aiming to **streamline the delivery** of innovative, advanced, secure networking at **low-risk levels**.

Yash Jethani

Definition

This quadrant examines the providers of enterprise WAN (primarily enterprise SD-WAN or hybrid MPLS/IP WAN) that deliver managed solutions and services. These include additional associated services such as fixed or mobile infrastructure and cloud-based software services directed towards streamlining enterprises' network operations. These may include new installations, replacement or upgrade installations, or hybrid cloud pathway installations accounted as networks. Regardless of the blend of network hardware and software, these services will be offered to enterprises as a service, entirely managed by the service provider.

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 telco 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 effectively replace** (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
5. **Proven capability** in seamlessly implementing new services and networks in commercial deployments
6. **Comprehensive and stable roadmap**, allowing updates as required
7. Reference customer/site **volume in deployment**
8. **Competitiveness** of offerings and types of commercial terms

Observations

Enterprise networking continues to expand as organisations look to optimise connectivity for their expanded cloud and remote operations. The space looks attractive from an investment standpoint as enterprises adopt large-scale SD-WAN solutions for rapid branch provisioning with distributed edge locations. Hence, the need for managed SD-WAN remains high, with many firms embracing fully managed or co-managed SD-WAN as a part of their cloud migration and security strategies. The DIY SD-WAN solution remains a choice for small enterprises or specific industry verticals.

There are numerous case studies of managed or co-managed SD-WAN transitions and operations from various providers across different industry sectors, detailing the risks and benefits of switching to a comprehensive SD-WAN and the hazards of continuing with a legacy WAN. Generally, the UK market is ahead of the broader European region in adopting SD-WAN, either as a standalone solution or often coupled with cloud managed network offerings or networking solutions to access public or private clouds. UK enterprises are also outsourcing network and security needs to third-party service providers to improve WAN security posture, optimise traffic, support remote workers and increase resilience.

The UK market has seen a notable rise in integrating hybrid security solutions into enterprise networks. While the quality of service and support SLAs is important, enterprises expect vendors and providers to improve their security offerings. These solutions often start with SD-WAN offerings and advance to include nuanced security functions such as security service edge (SSE), but a SASE implementation builds onto the SD-WAN, acting as a vital foundational component.

From the 38 companies assessed for this study, 28 qualified for this quadrant, with 10 being Leaders and one Rising Star.

accenture

Accenture offers end-to-end SD-WAN or SDN transformation and operational services with a platform-centric sustainable approach.

BT

BT combines network buildout and maintenance solutions with automation, cloud interconnects, its Global Fabric™ offering and a solid partner-agnostic ecosystem through flexible managed network services.

colt

Colt couples its global network and expertise in multivendor SD-WAN integration to provide a superior customer experience with security, customisation and flexibility.

HCLTech

HCLTech's winning playbook with account-led strategic penetration continues to do well in the UK market, backed by robust automation, cloud-based consumption models and strong partnerships.

MICROLAND
Making digital happen

Microland focuses on *Making Digital Happen*, with strengths across IoT, automation, network, security, cloud and data centre (DC) practices and partner networks.

orange Business Services

Orange Business offers an innovative platform and operational models for managed, co-managed and customised delivery to fit its clients' unique business requirements, enhancing CX.

TECH mahindra

Tech Mahindra offers platform-centric, automated and optimised service management for global clients using a consumption-based approach.

Verizon Business

Verizon Business has prioritised automation, AI and ML, innovation and multicloud with its network-as-a-service (NaaS) solutions. Under its managed network services (MNS) portfolio, application-aware routing and network optimisation help enterprises stay business-focused.

Virgin Media O2 Business offers unique service agreements focusing on sustainability areas for changing customer requirements, paving the way for public sector enterprises and large private organisations to innovate within regulatory guardrails in the SD-WAN space.

Vodafone

Vodafone targets large enterprises but has SME and small office/home office (SOHO) clients. More partner-backed solutions have increased its managed SD-WAN and SASE service capabilities, catering to diverse industries in the UK.

Wipro offers best-of-breed SD-WAN solutions backed by its experience across different architectures, technologies and cloud and network partnerships, forming a base for the right functional and futuristic structures.

Computacenter

Computacenter (Rising Star) offers managed SD-WAN solutions that are customer-centric and sustainable, combining its expertise in managed and professional services.

Leader

"With a unique approach to respecting changing customer requirements, Virgin Media O2 Business offers differentiation by bringing the best of its parent entities and blending partner roadmaps and innovation into the equation."

Yash Jethani

Virgin Media O2 Business

Overview

Virgin Media O2 Business was created through a 50:50 joint venture between Telefónica O2 and Liberty Global. It has planned to invest around GBP 2 billion in networks and services. The company has more than 1,500 cybersecurity professionals with nine labs and innovation centres. Its 336 points of presence (POPs) cover most UK businesses for SD-WAN expansion. The company provides SD-WAN solutions, utilising its underlay capabilities to seamlessly merge various network access services with cybersecurity services. Virgin Media O2 Business provides security features built into the existing portfolio in the connectivity (fixed and mobile) space.

Strengths

Focus on AI and innovation: Via Telefónica Tech, part of Telefónica Group, Virgin Media O2 Business collaborates for cybersecurity, cloud, AI, IoT, data analytics and blockchain solutions. The group also invests in cybersecurity start-ups through Wayra, Telefónica's Open Innovation Hub, and Telefónica Tech Ventures.

Sustainability: As Virgin Media O2 Business has committed to spending GBP 10 billion within 2022–2027, it continues to expand its access portfolio with full fibre and 5G in a sustainable way. All major purchase awards are contractually committed to defined sustainability requirements and aligned carbon reduction goals by 2040. Carbon reduction, circularity in design and connecting the unconnected are prime areas in which the company is partnering and developing unique solutions.

Concentration on SMB and public sector: Virgin Media O2 Business has a wide choice of multiple SD-WANs, IP and Ethernet VPN. The company combines its local presence and knowledge fronted by its account and service teams to offer a unique proposition to public sector enterprises, county councils and SMBs with encrypted traffic, firewalls and a central platform for SD-WAN. With its success agreement overseen by a C-suite-led success board, the firm promises to push the costs down in the first months of an engagement and provides an allowance in case the business requirements change.

Caution

Virgin Media O2 Business needs to market its converged multicloud, multivendor secured networking capabilities quickly to cater to the converged needs of SMBs, public sector organizations and large enterprises. Building an ROI calculator that aligns well with the firm's partners and its own ESG strategy could bolster its GTM in the SD-WAN space.

SDN Transformation Services (Consulting and Implementation)

SDN Transformation Services (Consulting and Implementation)

Who Should Read This Section

This quadrant is relevant to enterprises across all industries in the UK for evaluating providers of SDN transformation services that involve consulting and implementation.

The quadrant highlights providers' network services and solution proficiency to handle network transformation from advisory and consulting to implementation.

The growing demand for a single pane of glass management solutions among UK enterprises to monitor their entire network infrastructure is fuelled by the expanding adoption of Industry 4.0 solutions across IoT, OT and IT environments. Organisations are now expecting service providers to have an SDN portfolio that offers unified visibility and consistent security policies, which is crucial for smart buildings, infrastructure and factories. By leveraging SDN coupled with Industry 4.0 solutions and embedded security, enterprises benefit from enhanced control, security and performance, thereby optimising operations.

Network-as-a-service (NaaS) is based on SDN and improves network scalability and manageability. The increased adoption trend of NaaS highlights SDN's potential, aiding in cloud and virtualisation-driven transformations and reducing deployment time and hardware costs. Enterprises expect service providers to provide networking and cybersecurity solutions in a manner akin to cloud services through as-a-service models such as NaaS, CPaaS and IaaS. This model offers various benefits to enterprises, such as enhanced security, cost savings and improved performance.

Networking professionals should read this report to understand how to effectively consume network transformation services and leverage the service providers' partnership ecosystem.

Digital transformation professionals should read this report to compare and understand how network transformation service providers align with their enterprise transformation journey.

Cybersecurity professionals should read this report to understand how providers use technologies to tackle security concerns associated with consulting and other SD-WAN transformation services.

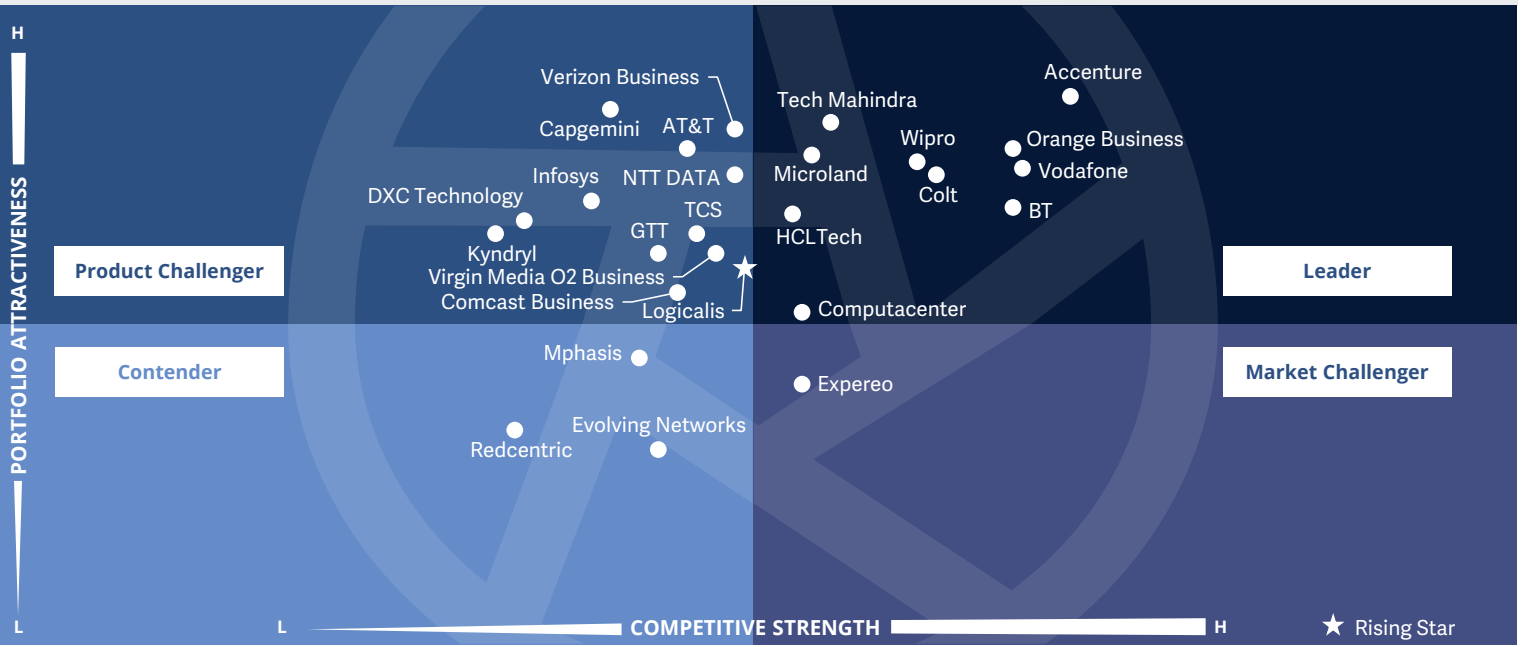
Procurement professionals should read this report to learn about the payment schemes offered by transformation service providers, especially around pay-as-you-consume or similar payment arrangements.

ISG Provider Lens™

Source: ISG RESEARCH

Network – Software Defined Solutions and Services
SDN Transformation Services (Consulting and Implementation)

U.K. 2024



This quadrant assesses providers offering **consulting and implementation services, specifically in SDN**. These companies can **deliver functional solutions** and services, from **initial advice to complete rollout assistance**.

Yash Jethani

SDN Transformation Services (Consulting and Implementation)

Definition

This quadrant analyses providers of advisory or consulting and other services (for example, planning) associated with delivering software-defined networking (SDN) and SD-WAN to enterprises, from initial adviser consulting to service delivery and rollout, including testing.

Modern businesses require more agility, flexibility, automation and security across delivery areas and business domains, including private, public, hybrid and multicloud networking; mobile application usage in the workplace; IoT; Industry 4.0; infrastructure as a service (XaaS); and intent-based AI and ML networking solutions requiring a flexible network environment that can accommodate changes quickly with minimum human intervention. SDN provides many of these benefits compared to traditional hardware-based networking and is closely related to network function virtualisation (NFV), cloudification strategies and digital transformation undertakings. However, it presents challenges in handling both legacy and transformed environments, highlighting the lack of skilled programmers or NetOps personnel in certain enterprise settings.

Many enterprises require independent advice or trusted consulting before making major organisational changes and prefer advisers who are not associated with the final network delivery.

Suppliers in this area are increasingly active as advisers or consultants for implementation to enterprises. They may also act as brokers and project managers to ensure combined coalition deliveries as planned. Consulting companies, prominent vendors and managed network service providers are also actively involved in offering SD-WAN packages in this area, independently or as a part of consortium deals.

Eligibility Criteria

1. **Scope** of product/service portfolio
2. **Ability** to provide consultation, from the strategising phase to technology deployment, and support in integration and implementation
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 post-pilot or **commercial deployment**
6. **Competitiveness** of offering and types of commercial terms

Observations

Engagements pertaining to enterprise network transformation often use advisory-led approaches in the UK. This is because SDN is a complex topic that requires business and industry-specific expertise. It is also necessary to plan for future technical improvements to meet business expectations. Before releasing formal requests for information (RFIs) or calls for bids for a procurement, companies often turn to traditional management or technology consulting firms for unbiased advice. Alternatively, companies can approach suppliers directly to request such assistance. These advisory groups usually comprise highly experienced professionals in specific domains. However, as vendors supply these provider teams in an attempt to profit from the partner ecosystem and provider services, such teams are often vendor-specific. As a result, there is also a growing trend of involving product-agnostic traditional consulting companies or system integrators (SIs) at the strategic and tactical planning stage.

In the UK, the presence of consultants and SIs has led to the establishment of internal consulting and advisory teams by key network service providers. These groups attempt to imitate external consulting and SI firms' vendor-neutral methodology. These suppliers typically stay involved with the chosen solution from its first advising phase through its operational phase.

Many providers within this quadrant utilise advanced methods to ensure seamless transitions from business roadmap to efficiently implemented operations.

From the 38 companies assessed for this study, 26 qualified for this quadrant, with 10 being Leaders and one a Rising Star.

accenture

Accenture provides a highly scalable, flexible and modern approach to a full range of SDN solutions that are fused with AIOps, cloud-native APIs and GenAI capabilities.

BT

BT is a leading and flexible player in the SDN space with its Global Fabric™ proposition. It offers comprehensive managed services across LAN, WAN, data centre and cloud with end-to-end managed services, encompassing governance, risk and compliance, zero trust and cyber threat management.

colt

Colt's network transformation and professional services infuse a nimble architecture and enable customers to add or remove services anytime, providing them with a high degree of modularity.

Computacenter

Computacenter views the cloud as the new data centre and the internet as the new WAN. This approach offers customers a consolidated technology vision to customers, *changing their world* with a unified sourcing strategy and end-to-end professional and managed services support.

HCLTech

HCLTech offers end-to-end assessment and consulting services coupled with the implementation of network, cloud and security aspects of projects, drawing on its expertise in LAN, WAN, data centre, IT/OT, Wi-Fi, network automation and management.

MICROLAND
Making digital happen

Microland leverages the Intelligent Network Experience framework for business case development, advice and technology comparisons related to SD-WAN. The firm offers guidance and consultancy services for comprehensive next-generation technology architectural goals.

SDN Transformation Services (Consulting and Implementation)

Orange Business can offer its clients complete end-to-end consultancy and assistance for SD-WAN or SASE transition projects. This continues through to the running phase, beginning with a context evaluation using a simple SD-WAN profiler tool.

Tech Mahindra provides advanced security and observability with SD-WAN, SD-LAN and SD-WLAN transformations in the UK market. Apart from telecom providers, it serves clients in the insurance, pharmaceuticals, public, retail and other sectors.

Vodafone

Vodafone is a key player in the UK SME market for network transformation, offering specialised solutions with the help of knowledgeable consultants and cutting-edge educational portals.

Wipro utilises Insightix™, its digital framework for consulting and evaluating existing network estate, to offer short- and long-term transformation roadmaps in line with client objectives.

Logicalis (Rising Star) leverages cutting-edge technology and solutions with sophisticated orchestration and management tools to provide advisory, implementation and managed services for all forms of network connectivity (including SDN and private 5G).

Edge Technologies and Services (including Private 5G)

Who Should Read This Section

This quadrant is relevant to enterprises across all industries in the UK that are evaluating providers offering technologies and services for the critical network edge space. The offerings include hardware, software, management and reporting tools, applications and other services associated with the network edge.

In this quadrant, ISG lays out the current market positioning of edge technology and service providers in the UK.

Enterprises operating in remote or hybrid environments require analysing data closer to the point of generation, allowing for faster and larger processing volumes and more actionable outcomes in real time. UK enterprises are prioritising providers' capabilities in edge computing solutions that seamlessly integrate with existing cloud infrastructure. This approach can help bridge the gap between edge and cloud, ensuring smooth data synchronisation, workload migration and hybrid orchestration with robust security measures.

ISG observes edge-as-a-service (EaaS) as a pivotal trend in the realm of edge computing, poised to reshape the digital landscape in 2024. The collaboration between edge and cloud, coupled with heightened security at scale, drives these transformative advancements. Enterprises in the UK seek providers offering robust edge computing services, enabling them to leverage enhanced performance and efficiency without requiring extensive infrastructure investments. With EaaS, organisations of all sizes can adopt and scale edge solutions more efficiently in an SD-orchestrated state, with private 5G, multi-access edge computing (MEC), containerisation, IoT, virtualised or universal customer premises equipment (vCPE or uCPE), SD-WLANs and SD-LANs.

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

Cybersecurity professionals should read this report to understand providers' security capabilities in mobile network service delivery, offering better visibility into their security approach.

Digital transformation professionals should read this report to understand how mobile network transformation service providers align with their enterprise transformation journey and effectively leverage their partnership ecosystem.

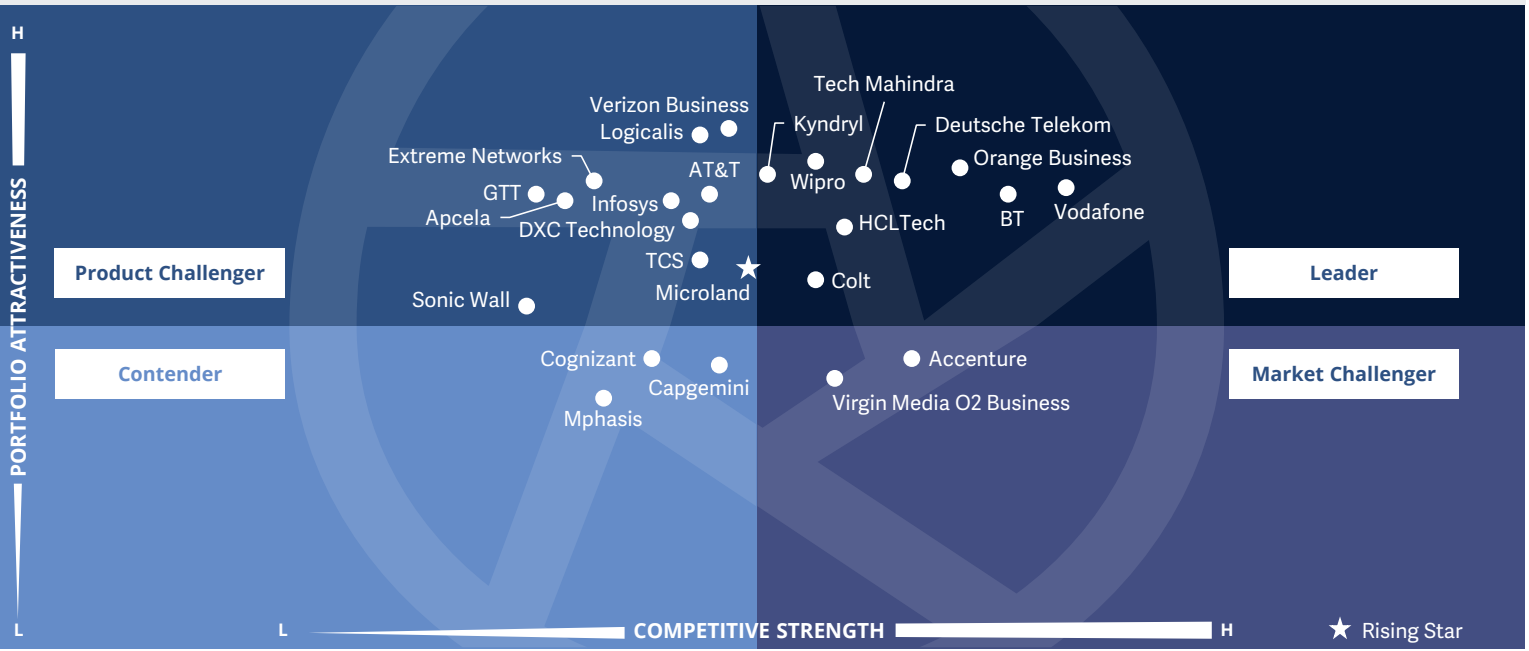
Procurement professionals should read this report to learn about the pricing models offered by edge service providers, especially around pay-as-you-consume and outcome-based or hybrid pricing engagements.

ISG Provider Lens™

Source: ISG RESEARCH

Network – Software Defined Solutions and Services
Edge Technologies and Services (including Private 5G)

U.K. 2024



This quadrant assesses providers of all-inclusive network edge solutions, including **private 5G** with **SD orchestration, SD-LAN** and other services and goods customised to meet the demands of businesses on the **network edge**.

Yash Jethani

Edge Technologies and Services (including private 5G)

Definition

This quadrant analyses vendors that deliver technologies across hardware and software, the management or reporting tools, and applications and services associated with edge network technology, including private software-driven 5G solutions, to enterprises.

Edge technologies, services and computing are current trends in IoT and IIoT, where connections are often made through private 5G networks via an SD orchestration for speed and flexibility. These are becoming increasingly important among many enterprises.

With the localised processing of data, security and privacy can be improved as any breach can be managed locally and not passed on to the WAN or cloud, thus returning to the central enterprise to defend. In IoT edge computing and networking, data from various connected devices in the IoT ecosystem is typically collected in a local device, analysed on the network, and then transferred to the central data centre or cloud.

As the number of connected devices has increased exponentially, the volume of data generated is multifold. This, in turn, places high importance on efficient and software-driven edge capability networks with SD-driven connectivity capabilities.

Edge components can be managed in the same manner as core and SD-WAN components. Software-defined capabilities comprise branch and edge functionalities, along with all customer premises equipment (uCPE or vCPE) and associated software-defined mobile networks (SDMNs) and SD-LANs that include wireless (SD-WLAN) and mobile (SD-WMLAN) networks, private 5G networks, and IoT sensors and devices or control/security devices.

Eligibility Criteria

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

Observations

Edge computing has been growing steadily and quickly in the UK. This growth can be partially attributed to flexible campus network expansion and mobility, as well as the increasing acceptance of the hybrid working style. Enterprise network edge technologies are a broad category of products and services intended to improve security, maximise efficiency and facilitate effective access to cloud-based applications. The development of edge technologies, such as network edge, branch edge and remote edge, has significantly increased.

Similar to other industrialised countries, edge computing is becoming a complicated and quickly expanding economic sector in the UK due to the introduction of new technology and process models such as multi-cloud SDN, smart cities, secure connected infrastructure, open source edge solutions and personalised CX. As such, the region has turned into a hub for business innovation. These models and technologies include SD-LAN, SD-WLAN or SD-MWLAN with strong security features and IoT, comprising IIoT and IoT sensors, control and security devices. In addition to some drawbacks, increased network dependability and performance are among the main advantages of implementing network edge technologies in enterprise networks. Businesses can allocate processing power far closer to the network edge by utilising technologies such as network function virtualisation (NFV), edge computing and SDN.

The usage of edge computing is growing YoY due to the robust UK industry vertical area, which includes global trends such as R&D, Industry 4.0, robotic devices, telemetry and metaverse.

From the 38 companies assessed for this study, 25 qualified for this quadrant, with nine being Leaders and one a Rising Star.

BT

BT lends innovation via partner ecosystems and cloud hyperscalers for enterprise edge transformation. This helps connect data at rest and in motion for enterprises with the Global Fabric platform in a data-sovereign environment.

colt

Colt's uCPE platform integrates compute, storage, networking and security into a scalable solution with a potential boost from its Edge Fabric® platform. The firm's dual-channel strategy and strong partnerships ensure end-to-end edge service delivery.

T

Deutsche Telekom enables autonomous robots and other high-performance applications by its private mobile networks. It provides enterprise customers with edge computing and hyper-converged infrastructure for processing and storing.

HCLTech

HCLTech provides unified service delivery with robust network observability across LAN/WLAN and Industry 4.0 with 5G and Wi-Fi integration. Its verticalised approach for Wi-Fi deployments coupled with AIOps is unique in the market.

kyndryl

Kyndryl offers a strong range of solutions, including an edge solutions team dedicated to edge computer vision and IT/OT integration with design, build, transform and serve elements. The team comprises highly skilled 5G and wireless network professionals.

orange Business Services

Orange Business' Evolution Platform extends functionalities at the network edge while prioritising security and performance. Leveraging its expertise in networking, cloud, analytics and security, the company offers integrated solutions with orchestration tools and data insights.

TECH mahindra

Tech Mahindra specialises in vendor-neutral, secured Industry 4.0 solutions, encompassing planning, design and deployment phases, along with vertical-specific application integration services across the edge and cloud.

Vodafone

Vodafone UK markets itself as a one-stop shop for the edge, IoT and private 5G, offering adviser-led and self-service solutions for deployment flexibility and a combined portfolio (VB Operator Connect, SD-LAN and VeloCloud).

Wipro has a strong engineering heritage and offers a wide range of edge and 5G solutions in a multicloud environment, emphasising automation, AI and security. Its BoundaryLess Universal Edge offerings cover telco and non-telco workloads, spanning SD-LAN, SD-WAN and SD-DC landscapes.

MICROLAND®
Making digital happen

Microland (Rising Star) offers a unique platform-led, consumption-centric IT/OT integrated security approach and automation frameworks in the UK market via its Indian delivery centres.

Secure Access Service Edge (SASE)

Who Should Read This Section

This quadrant is relevant to UK enterprises across all industries for evaluating enterprise SASE providers.

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

The rise of hybrid work models has significantly transformed enterprise dynamics. This shift also poses various challenges for IT leaders, such as navigating complex infrastructures, integrating systems and addressing skills gaps within teams. UK enterprises are prioritising advanced security models to ensure secure access to cloud-based applications amidst the evolving cyber threat landscape. In response to these demands, zero trust architecture (ZTA) has become an integral aspect of SASE, providing an additional layer of security by meticulously verifying every user and device accessing the network. Enterprises are focusing on infusing cloud access security broker (CASB), secure web gateway (SWG), firewall-as-a-service (FWaaS), sandboxing, cloud identity and access management, security orchestration, automation and response (SOAR), security information and event management (SIEM) and data loss prevention (DLP) within SASE frameworks for a robust foundation securing data and mitigating risks. This further strengthens security postures by centralising access controls while ensuring compliance.

UK enterprises are also seeking providers to deliver robust security frameworks equipped with threat detection and prevention capabilities, data security and value realisation. They are keen to expedite the integration of threat intelligence, behaviour analytics and real-time threat response capabilities within the SASE offerings to enhance the overall enterprise network security posture.

Cybersecurity professionals should read this report to understand the current security capabilities offered by consulting and other SASE service delivery providers.

Networking professionals should read this report to gain insight into the technical capabilities, integration potential and partnerships of SASE providers.

Procurement professionals should read this report to get acclimatised with SASE providers, especially around new pay-as-you-consume options instead of traditional models.

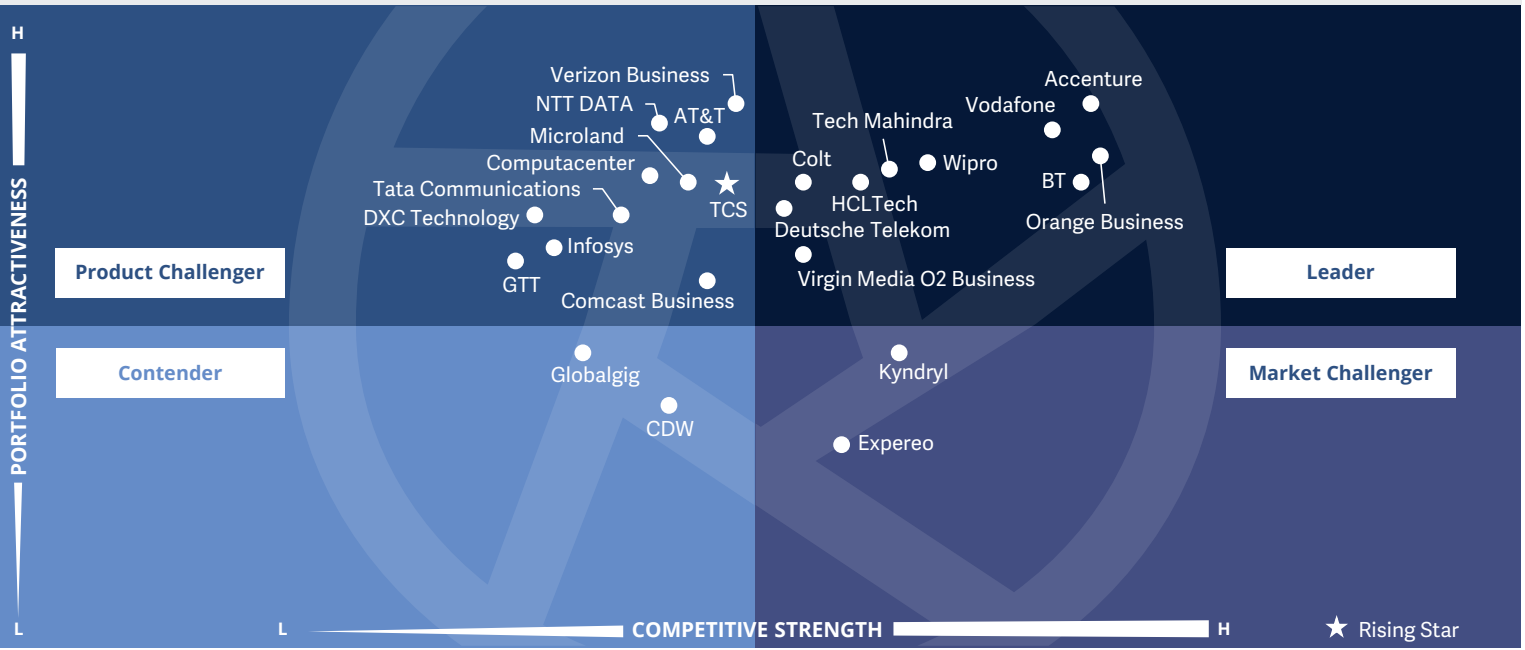
Digital transformation professionals should read this report to compare and understand how providers of SASE services support enterprise digital transformation.

ISG Provider Lens™

Source: ISG RESEARCH

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

U.K. 2024



This quadrant evaluates providers offering SASE solutions and services that operate and serve as **comprehensive, integrated networks** and **advanced security solutions**, ensuring a secure network from the **network edge to the core**.

Yash Jethani

Definition

This quadrant analyses SASE solutions that are offered to enterprises as overarching integrated networks and security solutions from the enterprise core to the edge. These include solutions moving into pilots and those already deployed commercially.

Enterprises are increasingly focusing on migrating their ICT and network operations to the cloud while enhancing security in all touchpoint areas. Software-defined networks have proven to efficiently assist with this by reducing complexity and facilitating risk-reduced migration to single or multicloud environments for enterprises. Network-integrated security has been evolving continuously, with the inclusion of components such as proactive detection and response solutions, zero-trust networking, and identity-based security and authentication. This is often referred to as SSE when added to an existing network. Many providers supply a combination of identity-based authentication, SASE and network security to create a holistic, secure-by-design approach for the network of the future. The major components of SASE include SD-WAN, cloud access security broker (CASB), next-generation firewall (NGFW) and firewall-as-a-service (FWaaS), zero-trust network access (ZTNA), and secure web gateways (SWG). These encompass secure and integrated access from the data centre (which may include network function virtualisation [NFV]) to the branch or edge, including SD-LAN or its wireless or mobile variant.

Suppliers in this area have been increasingly active as advisers or consultants for implementation, providing complete pilots and solutions to enterprises. Prominent vendors and managed network service providers are also actively involved in offering SASE.

Eligibility Criteria

1. **Product portfolio coverage, focus areas, completeness of solutions**, fully integrated broader solutions linking to data centres or other enterprise IT applications and systems
2. Membership or affiliation (including inputs) with **global SASE technical and trade groups**
3. Ability to enable clients to **reuse the existing network** and ICT solutions instead of *rip and replace*
4. **Ability to deliver training and provide testing** for clients
5. **Industry-specific knowledge** and experience mapped to the client type
6. **Scope of partnerships and offerings** and management capability for the needed orchestration within a customer project
7. **Reference customers or solutions** in commercial deployment
8. **Competitiveness of offerings** and types of commercial terms

Observations

In 2023, the UK's SASE market experienced a significant surge driven by a shift towards remote and hybrid work. The proliferation of unique devices in different places increased the adoption of cloud-based security solutions. Further growth is anticipated in the coming years, likely accelerated by the demand for cybersecurity and digital transformation projects.

Furthermore, providers are organising their offerings to satisfy the changing connectivity requirements of businesses in their pursuit of safe access to applications from anywhere. This approach has made it even more important to integrate features into a single-pane design and enforce uniform security regulations at all network edges. The market emphasises a comprehensive strategy that integrates the SASE into larger policies to ensure a unified security posture and uses sophisticated security technologies such as data loss prevention (DLP), remote browser isolation (RBI), security information event management (SIEM) and extended detection and response (XDR).

A sizable portion of systems integrators (SIs), service providers and telcos involved in security projects believe there is a growing trend of convergence between network and security to strengthen the entire network and security posture. In keeping with Zero Trust Architecture (ZTA), service providers are improving security services even further. In this scenario, collaboration with hyperscalers, security OEMs, and networking leaders is essential for enabling convergence, working together and providing the market with well-integrated SASE. ISG anticipates that alliances with security suppliers will continue to grow in the coming years.

From the 38 companies assessed for this study, 25 qualified for this quadrant, with 10 being Leaders and one a Rising Star.

accenture

Accenture has made several partnerships and acquisitions in the UK to strengthen its enterprise network security capabilities and offer a full suite of SASE solutions underpinned by Cloud-First Networks practice.

BT

BT has a wide array of SASE solutions backed by managed service offerings. It also supports a hybrid vendor and single vendor ecosystem. The provider's extensive partnerships and integration expertise complement its customer-first approach.

colt

Colt relies on Versa Networks to provide robust SD-WAN solutions incorporating universal customer premises equipment (uCPE) and virtual network functions (VNFs). It also offers SD-WAN remote access functionalities, benefiting from Versa's SASE-enabled hybrid solution.

Deutsche Telekom leverages its technical expertise to build and manage end-to-end SD solutions in a modular approach covering SD-WAN/WLAN, security, cloud connect, underlay and coverage for multiple customer segments.

HCLTech

HCLTech's expertise in SASE solutions is bolstered through strategic partnerships with leading industry players, including Palo Alto Networks and Cisco. These partnerships enable HCLTech to provide tailored SASE solutions to meet secure and modern connectivity needs.

orange Business Services

Orange Business' platform-based approach towards network and security services creates a unique value proposition in the market, coupled with its expertise in professional services, partner technologies, super points of presence (POPs) and automation.

Tech Mahindra offers network-managed services, network operations centres (NOCs) and shared services for network security, consulting, planning, design, system integration and customisation. Its SASE expansion plan caters to cloud environments such as Azure, AWS and Google Cloud.

Virgin Media O2 Business enhances advanced security functionalities such as AI operations, automation, security orchestration, automation and response (SOAR) and distributed denial-of-service (DDoS) protection for customers. Strategic collaboration with Telefónica Tech aims to bolster cloud and security services.

Vodafone

Vodafone's SASE solution is equipped with various advanced security functionalities, such as ZTNA, SWG, CASB and FWaaS, to provide secure and seamless access to applications and services from any device or location.

Wipro focuses on 360-degree ecosystem investments and over 10 strategic partnerships to deliver a wide range of network and security services. Its #WANfreedom offers a suite of managed services aimed at transforming enterprise WANs.

TCS (Rising Star) focuses on investing in its own platforms, such as the TCS Cognix™ Platform, TCS IBEX Labs & 5G experience centre and TCS Connected Users Platform, for accelerating enterprise digital transformation.

Leader

"Virgin Media O2 Business is well-recognised for its comprehensive services among the enterprises and public sector in the UK market by leveraging Telefónica Tech's range of services and integrated technological solutions in security."

Yash Jethani

Virgin Media O2 Business

Overview

Virgin Media O2 Business was created through a 50:50 joint venture between Telefónica O2 and Liberty Global. It has planned to invest around GBP 2 billion further in networks and services. It has more than 1,500 cybersecurity professionals with nine labs and innovation centres. Its 336 points of presence (POPs) cover most UK businesses. The company provides SASE solutions, utilising its capabilities to seamlessly merge various network solutions such as SD-WAN, multi-protocol label switching (MPLS) and dedicated internet access (DIA) with cybersecurity services. Virgin Media O2 Business provides security features built into the existing portfolio in the connectivity (fixed and mobile) space.

Strengths

Telefónica Tech integration: Virgin Media O2 Business integrated its Telefónica Tech with an emphasis on enhancing cloud networking and security solutions, including cloud IaaS and PaaS alongside private cloud hosting and managed detection and response security services. This also enables Virgin Media O2 Business to deliver comprehensive SASE solutions, coupling the security and networking capabilities into a single service.

Enhanced enterprise connectivity: Virgin Media O2 Business, through its partnership with Zscaler, offers a full suite of SASE frameworks to enhance security, connectivity and flexibility for enterprises while ensuring secure cloud access for users anywhere. It also delivers managed Zscaler Internet Access (ZIA) and Zscaler Private Access (ZPA), integrated with SD-WAN and DIA networks. Its security portfolio and roadmap are orientated towards Zero Trust and ZTNA, allowing a SASE to be a standalone proposition for acquisition targets.

Vendor or technology-agnostic approach: Virgin Media O2 Business partners with leading technology vendors and connectivity providers in the UK to offer advanced network and security solutions, regardless of customer location or size. By leveraging the vendor's platform, product and capabilities, Virgin Media O2 Business designs, deploys and manages services that combine multiple vendor offerings, including Versa FlexVNF, Cisco Meraki, Viptela, Umbrella, Palo Alto Strata and Prisma Access.

Caution

Virgin Media O2 Business is well-positioned to serve UK-based clients with its SASE solutions supporting the Zero Trust framework. However, the company needs to expand its footprint outside the country to accommodate new client wins.

Star of Excellence

A program, designed by ISG, to collect client feedback about providers' success in demonstrating the highest standards of client service excellence and customer centricity.

Source: ISG Star of Excellence™ research program, Insights till June 2024

In the ISG Star of Excellence™ research on enterprise customer experience (CX), clients have given feedback about their experience with service providers for their **Network – Software Defined Solutions and Services**.

Based on the direct feedback of enterprise clients, below are the key highlights:

Client Business Role

▲ **Most satisfied**
Sales/Marketing

▼ **Least satisfied**
Finance

Region

▲ **Most satisfied**
Australia/New Zealand

▼ **Least satisfied**
Central/South America

Industry

▲ **Most satisfied**
Retail

▼ **Least satisfied**
Chemicals

Industry Average CX Score

▲ Highest CX: 88.2
▼ Lowest CX: 51.2

CX Score: 100 most satisfied, 0 least satisfied
Total responses (N) = 269

Most Important CX Pillar

Execution and Delivery

Service Delivery Models	Avg % of Work Done
Onsite	53.1%
Nearshore	21.5%
Offshore	25.4%

Appendix

The ISG Provider Lens 2024 – Network – Software Defined Solutions and Services study analyses 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.

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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 June 2024, 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

Yash Jethani
Lead Analyst

Over 13 years of professional experience primarily in TMT vertical by contributing to thought leadership, market & competitive research, consulting, business development, due diligence as well as account management cutting across corporate marketing, risk, strategy and sales functions.

Prior to ISG, Yash worked with KPMG in India supporting their national TMT practice in advisory, thought leadership as well as strategic pursuits. While at IDC, he was responsible for delivering custom as well as syndicated research for Telco & IoT Asia Pacific clients.

He has also had stints with CGI and TCS in supporting their corporate and account marketing initiatives with a focus on next-gen IT delivery within Telco/Comms verticals. He currently contributes to ISG's Provider Lens global research studies as a lead analyst.

Yash holds a PGDM in Telecom & IT supported by an engineering degree in computers. He is also a TM Forum certified business development manager.

Research Analyst

Deepika B
Research Analyst

Deepika is a Senior Research Analyst at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on Cybersecurity - Services and solutions, Telecommunication, Media and Entertainment Services and Networking – Software defined Solutions and Services. She works closely with the Lead author from diverse regions in the research process. She also authors enterprise context and global summary reports. She has over 4 years of experience in the technology research industry and has carried out various client-facing ad-hoc projects across industries such as Automotive, BFSI, and Retail & Consumer Goods.

Prior to this role, she was also accountable for maintaining a constant eye on the technology market and providing insightful quantitative and strategic analysis to clients through market sector reports.

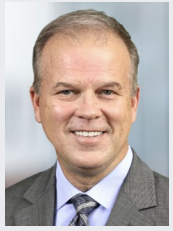
Study Sponsor

Heiko Henkes

Lead Analyst

Heiko Henkes serves as Director and Principal Analyst at ISG, overseeing the Global ISG Provider Lens™ (IPL) Program for all IT Outsourcing (ITO) studies alongside his pivotal role in the global IPL division as a strategic program manager and thought leader for IPL lead analysts. Henkes heads Star of Excellence, ISG's global customer experience initiative, steering program design and its integration with IPL and ISG's sourcing practice. His expertise lies in guiding companies through IT-based business model transformations, leveraging his deep understanding of continuous transformation, IT competencies, sustainable business strategies and change management in a cloud-AI-driven business landscape. Henkes is known for his contributions as a keynote speaker on digital innovation, sharing insights on using technology for business growth and transformation.

IPL Product Owner



Jan Erik Aase

Partner and Global Head – ISG Provider Lens™

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

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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.

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