

Network – Software Defined Solutions and Services

A research report comparing provider strengths,
challenges and competitive differentiators

Customized report courtesy of:



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SD networks continue to support a broad base of enterprises aiming for global expansion

In the last couple of decades, the traffic on MPLS and dedicated leased lines has increased significantly and correspondingly have IoT endpoints, which need to connect remote locations. Quick business decisions with resilient on-demand connectivity have become the need of the hour. As enterprises seek growth under the combined effects of two strong headwinds, namely, decarbonisation and AI, cost-effective and rapid network provisioning needs to be tailored to bring about sustainable and intelligent digital transformation. Tight labor markets, persistent inflation and geopolitical tensions put a continuous pressure on enterprise earnings. In APAC, which remains a crucial region for the global economy, the demand for flexible, cost-effective secured, sustainable and intelligent solutions is expected to remain

robust, particularly in high-growth, emerging markets such as India and the broader ASEAN, followed closely by mature markets such as Australia, Singapore and New Zealand. In the area of networking, the focus on “software-defined x” needs to encompass existing network equipment, hyperscalers, SaaS and security vendors as well as communications service provider (CSP) networks.

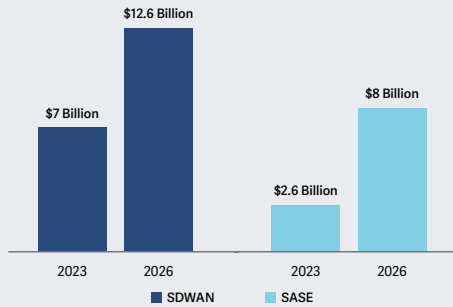
ISG expects the digital transformation trend to accelerate further as organizations continue to migrate workloads to public and private cloud and access more cloud-based solutions across APAC.

Enterprises in APAC continue to accrue significant costs by maintaining or adding MPLS links and have been compelled to embrace co-managed, DIY or fully managed software-defined wide area network (SD-WAN) as a part of their cloud migration and security strategies. However, in the initial part of 2020 and 2021, enterprises struggled to negotiate carrier contracts with telecom providers (they still form the bulk of MPLS, leased line and IP/VPN connects for enterprises in the region)

Co-managed
SD network
deployments
comprise
most APAC
implementations.



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



Source: ISG Software-defined networks research

for SD-WAN-related constructs. As SD-WAN quickly emerged as a go-to technology for a remote workforce, leveraging cloud-connected applications, service providers and telecom providers started to develop differentiated go-to-market (GTM) strategies by offering cost-competitive offerings with plug-and-play setups. In an ideal world, optical and transport networks need to be automated with full SDN orchestration and end-to-end service chaining, playing by the laws of physics. But, this ISG

Provider Lens™ study examines various network services and solutions related to software-defined networking (SDN), specifically in APAC. These offerings include managed SD-WAN, as well as transformation services, edge technologies (including associated SD-LAN and private 5G mobility technologies and services, as well as secure access service edge [SASE]).

In the past, many enterprises in APAC have increased the capacity of their existing VPN deployments rather than replacing the traditional ones with transformative alternatives such as SD-WAN/SD-Edge for supporting network capacity expansion or security. Deployment of cloud-based security controls has emerged as a leading enabler of secure hybrid work across the region and across industry verticals, validating the role of the cloud in rapidly deploying new and innovative security capabilities at scale. Similar to many other regions worldwide, businesses in Asia have faced challenges stemming from local and global environment-related regulations and environmental and social governance (ESG) guidelines, the ongoing aftereffects of the

pandemic (including remote or hybrid working) and rising energy and transport costs due (in large part) to the ongoing crisis situation in the Far East, Russia and the Middle East. Therefore, they are now actively seeking innovative solutions to improve overall enterprise operational efficiency.

A few notable drivers of current market growth in APAC are the offerings from SIs together with their partner ecosystems and the competition from all traditional network service providers with their SD-WAN offerings. Also, SMEs across industries are accelerating their adoption of SD-WAN. Enterprises in mature APAC countries (Australia, New Zealand and Singapore) are also highly focussed on incorporating secure and advanced technologies into their corporate networks, including big data, edge computing, enhanced security, SASE, mobility (such as private 5G networks), IoT, hybrid cloud and platforms, with much emphasis on ML and AI.

Throughout APAC, companies are implementing various strategies primarily to reduce costs, while concurrently enhancing agility, flexibility, competitiveness, security, remote working capabilities and business

continuity practices. According to the ISG Provider Services Sales Enablement Portal, enterprises across manufacturing, banking and financial services, retail, healthcare, transport and logistics and resources industries and the public sector continue to leverage network transformation as they seek diversification, resiliency and security across their supply chains. The US, the UK, Australia, Singapore, Brazil, Japan, France, Germany, ASEAN countries as well as South Korea are the top countries where these enterprises are headquartered.

As enterprises leverage network transformation and cloud managed as-a-service models, it ultimately leads to an improved CX and UX. However, one major challenge in achieving these goals is in the use of technology and the transformation of established processes and management practices, including moving away from the self-managed and operated in-house (DIY) model to the supplier-managed or as-a-service model.

Most large enterprises in APAC have a good business-IT coupling and a sound focus on sourcing and cloud functions. However,



SASE Providers + Cloud Hyper Scaler Supported Networking

2021-2024 (rise of network-security convergence)



Container-Based Platforms (GCP, AWS, Oracle, etc.)

Security Players & Load-Balancers; Optimizers

2019-2021 (rise of the edge & security)



Prisma Palo Alto
FortiSASE
Cato SASE
Versa SASE



Fortinet
Palo Alto Forcepoint
FatPipe Networks
Riverbed
SilverPeak
Barracuda
Citrix
Talari

SD-WAN Core Players

2015-2018 acquisitions



Pure SD-WAN Players

Versa Networks, Aruba,
Cato Networks, Aryaka,
Versa, Nuage



Big Networking Providers

Cisco, HPE, VMWare,
Nokia/Ericsson

Customer Options

Partnership



APAC focused IT
Services Providers

Partnership



Telecom Providers
(Singtel, TATA Comms.,
Telstra)



currently, most of them are on their journey towards leveraging automation, intent-based networking and managed services for all their sites. This is where the DIY approach versus managed services debate ensues as they continue to focus on reducing complexity and costs with greater control. In particular, if SD-WAN is consumed as a managed or co-managed service, monitoring and reporting can be highly automated and mapped to SLAs and key performance indicators (KPIs) while producing dashboards or single pane of glass views that are easy to understand.

As 5G penetrates further in APAC, expecting to reach more than 250 million by 2025 across ANZ, ASEAN and India, several operators such as M1 (Keppel Ltd.), AIS, Singtel, Bharti Airtel, Telkomsel, True, PLDT, Telstra, Optus, TPG/VHA, Telecom Malaysia and will swiftly join hands with local edge vendors, encompassing data centres, fibre deployments, FWA equipment and wholesale providers to provide nuanced use cases. Further, as the virtualisation of customer premise equipment progresses, software-defined branch and edge functionalities will encompass mobile and fixed

components of the network under various region-specific regulations.

Further, large enterprises in APAC are increasingly adopting SD-WAN as a part of a comprehensive managed services SASE solution, often procuring it as a fully managed SASE service from a managed IT services provider rather than an incumbent telecom provider or an equipment vendor or even a cloud service provider. However, as APAC is quite disparate in its buying behaviour, there are countries such as the Philippines and Indonesia that rely more on network equipment providers and telecom service providers and Singapore and Malaysia that rely more on cloud service providers. SASE represents the point at which enterprise networking and security fully converge. The below diagram summarises the scope of the regional study with a focus on *who owns the customer*:

APAC has a wide range of SD-WAN and other SD network solutions offered by CSPs, network service providers, SIs and their partner ecosystems. There are several key factors driving rapid changes in enterprise networks. These factors can be summarised as follows.

Pivoting to a fully managed or co-managed services regime:

SDN-enabled solutions can be provided as fully managed or co-managed services, reducing overall costs and implementation risks. These services also enable enterprises to respond quickly and effectively to customer inquiries and automatically provide new services as needed, thus enhancing CX and offloading stress and complexities for internal users, thus improving UX. APAC remains slightly behind the US and UK in terms of fully adopting managed services. A significant portion of the APAC enterprise network market is still transitioning from DIY solutions to co-management with a provider or a fully managed state. However, the expectations of cost reduction, cutting edge technologies and flexibility are higher among APAC customers compared to their global counterparts as per ISG's 2023 Networking Survey.

Increasing network security: Asia-based firms and corporations continue to be concerned about network security, and they anticipate and demand complete, sophisticated security measures from their networks' core to their

periphery. It is to be noted that 73 percent of global enterprises with regional operations in APAC, surveyed in the ISG Networking Survey 2023, mentioned network security would be their top priority for network infrastructure until end of 2024. This expectation is met by SD networks that serve as the basis for complete SASE installations and are especially useful for the secure provisioning of cloud-based and hybrid networks.

Streamlining operations and boosting

adaptability: Enhancing network resource integration, automation, security, orchestration and management are top priorities for businesses in APAC. Using SDN with centralised orchestration and management systems and dashboard reporting that is more straightforward are such examples.

Reducing the risk of cloud and multicloud

migration: Businesses in the region are rapidly moving their network and IT activities to cloud or multicloud environments. SD networks have a well-established track record of assisting with risk and complexity mitigation of single or multicloud environments. Multicloud networks in a multi-WAN and a multivendor networking



environment provide flexibility as well as opportunities for self-learning to enterprises.

Strength of the SD-WAN SME market:

SD-WAN technology is being rapidly adopted by the sizable SME market in APAC. These SMEs primarily rely on cloud-based solutions for communication and collaboration, and they frequently have distributed workforces and hybrid work structures. Often, through provider partner ecosystems, low-cost SD-WAN solutions are utilised to connect to cloud and security providers. However, not all the main SD-WAN providers in APAC serve this market area; many continue to concentrate on the large and multinational enterprise segment.

Level of risk in transitioning to new

technology: Many APAC corporations are more inclined towards implementing new technologies than comparable businesses in the US or UK. Regarding reducing implementation risks in cutting-edge technology domains such as enterprise digitalisation, intent-based networks, AI and ML-driven solutions, closed-loop automation, north-bound network integration with cloud-native microservices architecture,

intelligent edge and multi-access edge computing (MEC), SD-LAN connectivity and management, the use of SD networks is now well documented by providers. 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 - within the heterogenous regulatory setup in the region.

This study examines the evolving market demands in APAC 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 lowers the risks of deploying and migrating multicloud and SASE solutions while concurrently delivering on complex and essential business requirements. Any such change needs to take SD-WAN into consideration at a crucial stage.




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
Aryaka	Not In	Not In	Not In	Product Challenger
AT&T	Product Challenger	Not In	Product Challenger	Not In
Aussie Broadband	Contender	Not In	Product Challenger	Not In
Axiata Group	Contender	Not In	Contender	Not In
Bharti Airtel	Contender	Not In	Not In	Contender
BT	Leader	Not In	Not In	Leader
Capgemini	Not In	Product Challenger	Not In	Not In
Cato Networks	Not In	Not In	Product Challenger	Product Challenger
Colt	Not In	Product Challenger	Not In	Not In
Data#3	Market Challenger	Contender	Contender	Not In



 Provider Positioning


	Managed SD-WAN Services	SDN Transformation Services (Consulting and Implementation)	Edge Technologies and Services (including Private 5G)	Secure Access Service Edge (SASE)
DXC Technology	Product Challenger	Product Challenger	Product Challenger	Not In
Fortinet	Not In	Not In	Not In	Market Challenger
GTT	Not In	Product Challenger	Not In	Product Challenger
HCLTech	Product Challenger	Leader	Leader	Product Challenger
HPE Aruba	Not In	Not In	Rising Star ★	Not In
Infosys	Product Challenger	Product Challenger	Product Challenger	Not In
Kyndryl	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Logicalis	Product Challenger	Product Challenger	Product Challenger	Contender
Lumen Technologies	Not In	Product Challenger	Product Challenger	Not In
M1 (Keppel Ltd.)	Not In	Contender	Not In	Not In



 Provider Positioning

	Managed SD-WAN Services	SDN Transformation Services (Consulting and Implementation)	Edge Technologies and Services (including Private 5G)	Secure Access Service Edge (SASE)
Macquarie Telecom	Contender	Not In	Not In	Not In
Microland	Product Challenger	Rising Star ★	Product Challenger	Not In
Mphasis	Not In	Not In	Not In	Contender
Nexion Networks	Not In	Contender	Not In	Not In
Nokia Networks	Not In	Not In	Market Challenger	Not In
NTT DATA	Rising Star ★	Product Challenger	Leader	Rising Star ★
Orange Business	Leader	Leader	Leader	Leader
Palo Alto Networks	Not In	Not In	Not In	Market Challenger
Reliance Jio Business	Contender	Not In	Not In	Not In
Singtel/NCS/Optus	Leader	Leader	Leader	Leader



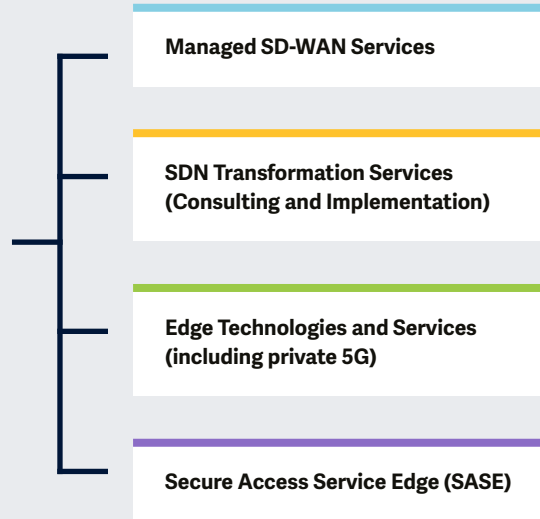
 Provider Positioning

	Managed SD-WAN Services	SDN Transformation Services (Consulting and Implementation)	Edge Technologies and Services (including Private 5G)	Secure Access Service Edge (SASE)
StarHub	Contender	Not In	Not In	Not In
Tata Communications	Leader	Not In	Not In	Leader
TCS	Leader	Leader	Product Challenger	Product Challenger
Tech Mahindra	Leader	Leader	Leader	Product Challenger
Telekom Malaysia	Contender	Contender	Contender	Contender
Telstra	Leader	Leader	Leader	Leader
Verizon Business	Leader	Leader	Leader	Leader
Vodafone	Product Challenger	Contender	Contender	Product Challenger
Wipro	Leader	Leader	Leader	Leader
Zscaler	Not In	Not In	Not In	Market Challenger



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 along with implementation support, in the SD-WAN area, and the providers focussed on such offerings. 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 private mobile network delivery via 4G/5G technologies and the service offerings related to these segments. In addition, 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 may be used in conjunction with the planned Managed Network Services IPL due for release in Q4, focussed on non SD-networks managed delivery.

ISG sets out to deliver a comprehensive research programme 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 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 advisors and enterprise clients also use information from these reports to evaluate their existing vendor relationships and potential engagements.

Provider Classifications

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

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between \$20 million and \$999 million with central headquarters in the respective country, usually privately owned.

- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above \$1 billion, with activities worldwide and globally distributed decision-making structures.

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

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





Provider Classifications: Quadrant Key

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

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

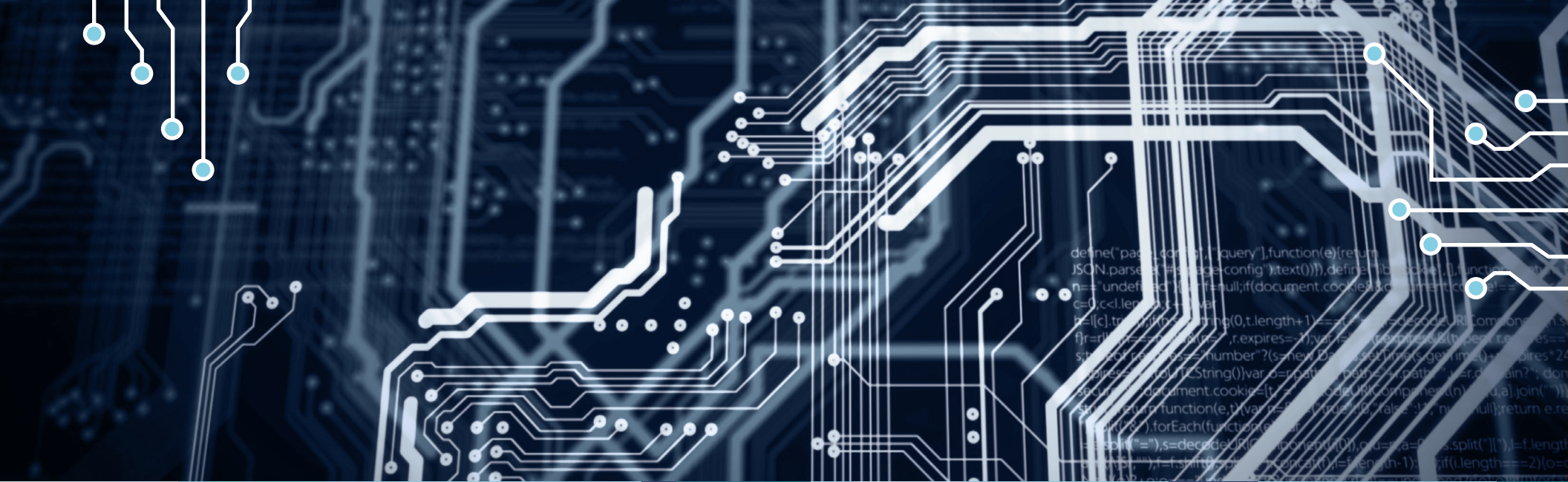
Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength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

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

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

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





Managed SD-WAN Services

Managed SD-WAN Services

Who Should Read This Section

This report is relevant to enterprises across industries in APAC for evaluating providers offering managed network services — primarily enterprise SD-WAN or hybrid multiprotocol label switching (MPLS)/IP WAN.

The quadrant highlights the expertise of APAC providers in enterprise network services and solution proficiency of appropriate providers in APAC, empowering enterprises to select the right partner for network transformation.

The need for end-to-end managed services from a single provider continues to find increasing relevance in this region. This trend shift is due to the need for simplicity, integrated security, performance assurances, vendor consolidation, scalability and comprehensive management. To facilitate these, a service provider rolls out a range of SD-WAN services, enabling enterprises to focus on their core network and security objectives while also leveraging a trusted partner's capabilities to manage their network infrastructure effectively.

The bundling of security features with SD-WAN offerings is a trend that will continue to gain traction in the next few years. Service providers offer enterprises a more holistic and streamlined approach to managing their network infrastructure and safeguarding against cyber threats. Since SD-WAN is strongly associated with security elements, MSPs are expected to support seamless SD-WAN deployments by collaborating with strategic partners and clients.



Networking and connectivity professionals should read this report to understand the provider landscape, integration capabilities and partnerships that will aid in selecting valid managed SD-WAN services.



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 functions.



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

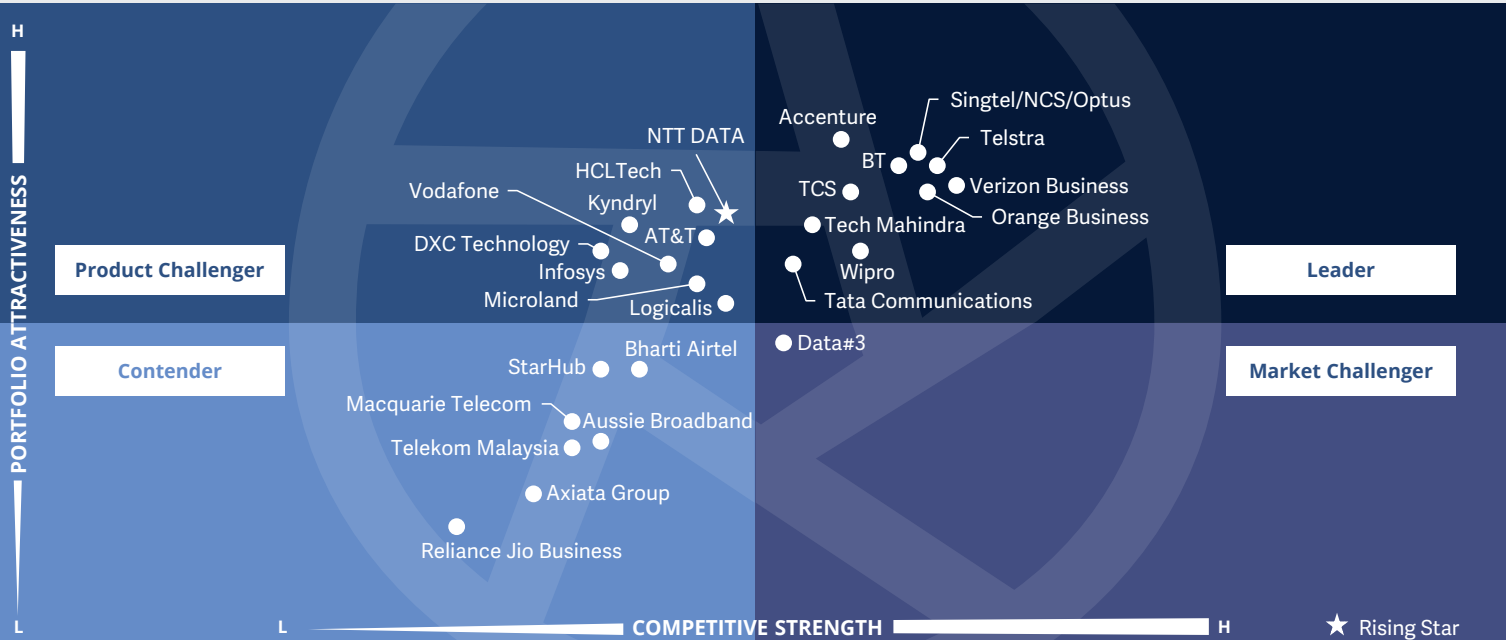


Procurement professionals should read this report to learn about payment schemes offered by transformation service providers, especially around pay-as-you-consume or similar payment models.



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

APAC 2024



This quadrant assesses providers that offer APAC businesses **managed or co-managed SD-WAN services and solutions** with the goal of streamlining the provision of cutting-edge, secure and **innovative networking at low risks.**

Yash Jethani



Managed SD-WAN Services

Definition

This quadrant examines the providers of enterprise WAN (primarily enterprise SDWAN 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 toward 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 centralizing and simplifying network management.

This overlay design abstracts software from hardware, enabling network virtualization 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 centralized 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 SDWAN network
5. **Proven capability** in seamlessly implementing new services and networks in commercial deployments
6. **Comprehensive and stable road map**, allowing updates as required
7. Reference customer/site volume **in deployment**
8. **Competitiveness** of offerings and types of commercial term



Managed SD-WAN Services

Observations

In APAC, broadband access is not inevitable, and the speeds vary dramatically. Enterprises prefer to migrate to SD-WAN not because of cost considerations but because of the structural shifts post-pandemic. Today, many success stories exist for managed or co-managed SD-WAN transition and operation across industry verticals and enterprise sizes, delivered from disparate provider types. The case studies received by ISG demonstrate a clear value-add in terms of cost (for APAC in general) and reduction in complexity (for ASEAN enterprises in particular), faster provisioning of sites, flexibility to use different networks with application-based performance (more so for India-based enterprises) and flexibility to change bandwidth with orchestration and automation (for ANZ enterprises). In line with these findings, systems integration and managed services projects for network segmentation, application monitoring/observability and dynamic path optimisation remained in higher demand in Singapore,

Australia and India, whereas cost optimisation remained the predominant theme for the broader ASEAN region.

The APAC market has also witnessed a significant increase in the integration of complex security solutions into enterprise networks. These solutions often include SD-WAN and advanced security functions such as SSE. While these solutions are often like full SASE solutions in many ways, they may lack some of the fully integrated cross-functionalities offered by the latter.

In markets such as the Philippines, Thailand, Indonesia and Vietnam, dependence on CSPs is high because of the market's constructs. However, others, such as Singapore and Malaysia, rely on cloud service providers for their managed services. India and Singapore rely more on SIs and managed service providers. Hence, the diversity of the ecosystem and the ensuing systems integration opportunities are immense in APAC with respect to edge, cloud, automation and AI.

From the 41 companies assessed for this study, 27 qualified for this quadrant, with 10 being Leaders and one a Rising Star.

accenture

Accenture focusses on growth markets with its well-proven Cloud First Networks + 5G offering coupled with deep expertise in network consulting and a vendor-agnostic and partner-centric approach to SD-WAN transformation projects in APAC.

BT

BT positions itself as a vendor-neutral, customer-centric, solution-driven managed SD-WAN player with a high focus on security in APAC.

Business

Orange Business provides an innovative platform and operational models for managed, co-managed and customised delivery in keeping with the unique business settings of its clients. Its 3A (awareness, automation and acceleration) approach in the fastest-growing region gives it a competitive edge.

Singtel/NCS/Optus

Singtel/NCS/Optus offers advanced cloud-driven network service offerings that combine Global Internet and Cloud Connect capabilities in multicloud, hybrid networking and SaaS environments.



Managed SD-WAN Services



TCS has over 50 partners for managing enterprise networks and goes to the market with a platform-centric, multicloud approach that combines zero trust security and automation.

Tata Communications

Tata Communications, a part of the \$123 billion TATA Group, provides secure network transformational products, services and solutions with flexible overlays as well as cloud-based consumption models with fully managed network and security stacks.



Tech Mahindra offers platform-centric, automated and optimised service management for clients using a consumption-based approach. It relies on low-cost SD-WAN options for the region.



Telstra, a tier-I global network provider, provides robust managed SD-WAN solutions via its Telstra Purple division.

Verizon Business

Verizon Business is a Tier 1 global network operator and has been at the forefront of customer acquisition, sales, and planning and development, with a heavy focus on automation via its NaaS offerings.



Wipro, with its expertise in various cloud and network partnerships, architectures, GTM focus, technologies and vendor-agnostic SD-WAN solutions, provides best-of-breed solutions that lay the groundwork for architecturally-aligned structures.

NTT DATA

NTT DATA, (a Rising Star), has been focussing on rapid expansion in the region on the back of SPEKTRA™ platform based deployments.





“Orange Business provides a highly differentiated managed SD-WAN solution to APAC enterprises by taking a platform-centric approach that includes traditional as well as next-generation technology support.”

Yash Jethani

Orange Business

Overview

Orange Business is headquartered in Paris, France. It has more than 29,000 employees across over 100 offices in 65 countries. In FY22 the company generated €7.9 billion in revenue, with IT Services as its largest segment. It has over 75 super PoPs (aims to reach 100 by 2025), relies on its global backbone and has a direct presence in over 100 countries. It has over 3,000 security experts and 5,000 SDx experts to optimize enterprise IT. With a strong advisory-led approach, a lineup of SD-WAN solutions, and a robust partner ecosystem, it is expanding Evolution Platform deployments, from consultation to running, with digital services and co-innovation.

Strengths

Orange Business’ 3A journey: With APAC being the fastest growing market for Orange Business, the company focusses on UX. It combines critical elements — Awareness on UX with productivity and capabilities; Automation with a machine-first approach that includes AI, analytics and infrastructure as code (IaC); and Acceleration with AIOps, using correlated data pools that bring together metrics, logs, traces and AI and ML models. To this end, it leverages partners across LAN, WAN, satellite, cloud and SSE, as well as knowledge management via dashboards.

Platform centricity: The Evolution Platform is built with network security and performance in mind. Most services hosted on the platform rely heavily on the network and

the platform’s high degree of experience in virtualisation, service chaining and ability to execute tasks correctly, as well as its capacity to manage and monitor effectively. The platform facilitates the management of multivendor implementations into a cohesive solution set for SD-WAN, SSE and SASE.

Differentiated go-to-market strategy: With over 35 percent dependency on the banking and financial services industry, Orange Business provides fully managed to co-managed to customised co-managed services to its clients in this industry. It also offers an option to leverage its *branch-in-a-box* solution, which combines LAN, WAN and security for low-scale implementations with tools for service monitoring.

Caution

As AI penetrates deeper into its clientele both in the public sector and among enterprises, Orange Business needs to partner with more companies (outside of France) specialising in AI and ML across predictive and generative areas, covering anomaly detection, AI-based log file interpretation and other use cases. Similarly, it needs to target more clients headquartered in the region.





SDN Transformation Services (Consulting and Implementation)

SDN Transformation Services (Consulting and Implementation)

Who Should Read This Section

This report is relevant to enterprises across industries in APAC for evaluating providers offering consulting and implementation services for SDN transformation.

The quadrant highlights APAC providers' network services and solution proficiencies to handle network transformation, right from advisory and consulting to implementation.

As the SDN landscape becomes increasingly complex, enterprises are looking for a consultancy-led approach and shifting to outsourced model for these services. The shortage of skilled professionals, particularly in roles like software and API development, has led to a surge in demand for managed services. Enterprises opt for managed services to access the expertise of service providers in managing various aspects of SDN. Consulting firms and MSPs are active in this space to offer expertise and guidance in designing, implementing and managing SDN solutions tailored to enterprise needs.

The as-a-service model growth locally continues. This model across networking and security architecture indicates a broader industry shift towards cloud-based solutions, subscription-based pricing and outsourced management. Additionally, the demand for hyperautomation within SDN transformation services has surged. Enterprises in APAC are keen on leveraging the advanced automation and orchestration capabilities of providers to drive efficiency, reduce manual intervention and enhance overall network agility. They expect the service providers to offer automation-led transformation and managed services as a part of their SDN transformation portfolio.



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



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



Digital transformation professionals should read this report to understand how network service providers align with their enterprise transformation journey and can be compared with each other.

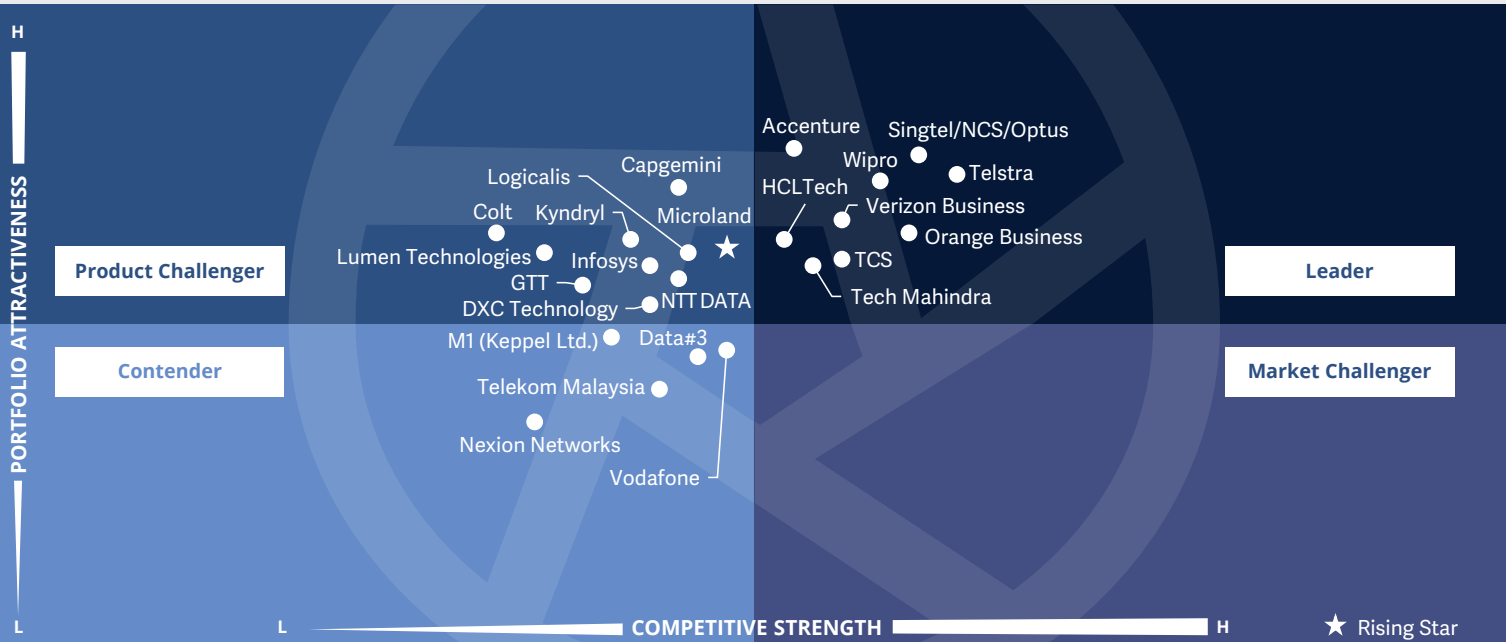


Procurement professionals should read this report to learn about payment schemes offered by transformation service suppliers, especially around pay-as-you-consume or similar payment models.



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

APAC 2024



This quadrant analyses providers of advisory, consulting, implementation as well as **maintenance services in the SDN and SD-WAN space.**

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 and SD-WAN to enterprises, from initial advisor 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. Software-defined networking provides many of these benefits compared with 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 advisors who are not associated with the final network delivery.

Suppliers in this area are increasingly active as advisors 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 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



SDN Transformation Services (Consulting and Implementation)

Observations

Engagements in the context of enterprise network transformation in APAC usually involve value-led, advisory-led approaches. This is because the field of SD networking is highly complex and requires enterprise and industry-specific expertise. Additionally, future-state technology planning is necessary to meet business needs. Before any formal requests for information (RFIs) or request for proposals (RFPs) contests for procurement, enterprises often seek advice from traditional management or technology consulting companies through independent advisory projects. As an alternative, companies can ask providers for such assistance. These advisory teams usually comprise professionals with experience and expertise in specific industries or domains. However, these provider teams are often vendor-specific, who wish to leverage certain providers' offerings and/or partner ecosystems. As a result, there is also a growing trend of involving traditional consulting companies or CSPs or SIs at the strategic and tactical planning stage as they are more product agnostic.

In APAC, the involvement of consultants and SIs has prompted major network service providers to establish consulting and advisory teams within their business units. These teams try to replicate the vendor-neutral approach of external consulting and SI firms. In most cases, these providers remain involved from the initial advisory phase to the operational phase of the selected solution.

Within this quadrant, many of the providers utilise advanced methods to ensure seamless transitions from a business road map to efficiently implemented operations.

From the 41 companies assessed for this study, 24 qualified for this quadrant, with nine being Leaders and one a Rising Star.

accenture

Accenture has developed deep domain expertise to enable it to offer tailored solutions to its clients across industries. Supported by acquisitions and partners, it spearheads the SDN services market in APAC.

HCLTech

HCLTech remains focussed on account- and region-led strategy for APAC to foster the growth of its network, security and consulting expertise with proprietary solutions as well as innovative offerings co-developed by liaising with startups and its extensive partner network.

Business

Orange Business can provide its clients with full end-to-end consultation and consequent support for any SD-WAN/SASE transformation project. This process is followed through to the running phase, where it uses a basic SD-WAN profiler to evaluate the context.

Singtel/NCS/Optus

Singtel/NCS/Optus offers unique network consultancy and implementation opportunities in APAC with Liquid-X, which provides a flexible, scalable, secure and visible network under the Singtel CUBΣ™ digital portal with NaaS capabilities.

TCS

TCS aims to be the partner of choice for industries such as banking and financial services, power and utilities and industrial conglomerates in APAC, offering cognitive and GenAI-enabled solutions.

TECH mahindra

Tech Mahindra provides advanced security and observability with SD-WAN, SD-LAN and SD-WLAN transformations in APAC. Apart from offering its services to Airtel and DTAC in the region, it supports clients from industries such as transport, financial services and retail.

T

Telstra which cuts across networks, data, security, IoT, cloud, software development and workplace services, can help enterprises navigate their outdated networks that are unable to handle the demands of modern technologies such as SD-WAN and AI and aid in their digital transformation journey.



SDN Transformation Services (Consulting and Implementation)

Verizon Business

Verizon Business uses a consultative approach to help APAC businesses make the switch to SD networks. The company is dedicated to investing in automation, orchestration, platforms and integration tools with its strong partner ecosystem.



Wipro leverages its Insightix™ consulting and evaluation platform across campus, data centre and telecom networks to offer a short- and long-term transformation exercise with superior outcome-based project implementation.

MICROLAND®

Making digital happen

Microland (Rising Star) uses the Microland Intelligent Network Experience - Consult framework to create business cases, offer advisory and undertake comparisons for SD-WAN technologies. It also provides consulting/advisory services for organisations seeking support on holistic next-generation technology architectures.





“Through Flexible SD-WAN, Orange Business offers an automated, intelligent network solution with virtualised on-demand services for end-to-end performance and control. It includes technical, business and integration advice on CX, workplace, cloud and data.”

Yash Jethani

Orange Business

Overview

Orange Business is headquartered in Paris, France. It has more than 29,000 employees across over 100 offices in 65 countries. In FY22 the company generated €7.9 billion in revenue, with IT & Integration Services as its largest segment. It has over 75 super PoPs (aims to reach 100 by 2025), relies on its global backbone and has a direct presence in more than 100 countries. It has over 3,000 security experts and 5,000 SDx experts to OPTIMIZE enterprise IT. With a strong advisory-led approach and lineup of SD-WAN solutions and a robust partner ecosystem, it is expanding Evolution Platform deployments, right from the consultative phase to implementing digital services with a co-innovation approach.

Strengths

Prolific partner integrations: Orange Business has various integration tools for auto-remediation, collaboration and proactive UX — IT and Net Ops from ThousandEyes, Solarwinds and AppDynamics; DevOps and SRE from Datadog and Prometheus; data centre infrastructure ops from VMware, Cisco and Splunk; and SSE from Fortinet and Palo Alto. It undertakes testing new technologies with clients and partners using its global OpenLab platforms.

Complete transformation support:

It supports clients from planning to execution through crucial digital services, audits, training, integration and co-innovation opportunities, as well as by defining setup and auditing of data strategies and policies. To further support transformation, its

delivery approach emphasises a global vision with local support, involving varied technology partners.

Transition and transformation: Each client SD-WAN/SASE transformation project includes timely and/or continuous end-to-end advisory and assistance. Under a global project management philosophy, *Synergy*, this support continues to the running phase, beginning with a context evaluation using a simple SD-WAN profiler tool. It can also offer regular, ongoing inspections of a network architecture and solutions for its clients. The company often customises programmes and road maps through co-innovation workshops and strategic meetings.

Caution

For its fastest-growing business in APAC, Orange Business needs to focus on risk and local compliance along with data migrations in cross-border settings as it promotes its SD-LAN, SD-WAN, cloud and data centre networking projects. It needs to continue to have profitability as a key objective.





Edge Technologies and Services (including Private 5G)

Who Should Read This Section

This report is relevant to enterprises across industries in APAC for evaluating providers offering technologies and services for the critical network edge space. These include hardware, software, management and reporting tools, and applications and other services associated with network edge.

In this quadrant report, ISG highlights the current market positioning of edge technology service providers in APAC.

AIOps are increasingly pervasive, especially in campus networking, where IT teams face various challenges, including bad coverage, interference and congestion coupled with trouble tickets due to application or WAN-level issues. These challenges can hinder enterprise network performance and UX. To meet these challenges, providers offer services around network observability to provide end-to-end visibility and help mitigate issues including Wi-Fi congestion, interference and downtime.

Increasing usage of AI/ML, automation and analytics is particularly useful in scenarios where real-time analysis and decision-making are crucial, such as industrial automation, and IoT applications are driving demand for edge services demand. Enterprises in APAC are actively seeking service providers to expedite the deployment of edge solutions, thereby enhancing responsiveness and efficiency while handling data-intensive tasks close to the source.



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



Digital transformation and operations professionals should read this report to understand how mobile network transformation service providers align with their transformation journey and monitor ongoing network performance.



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

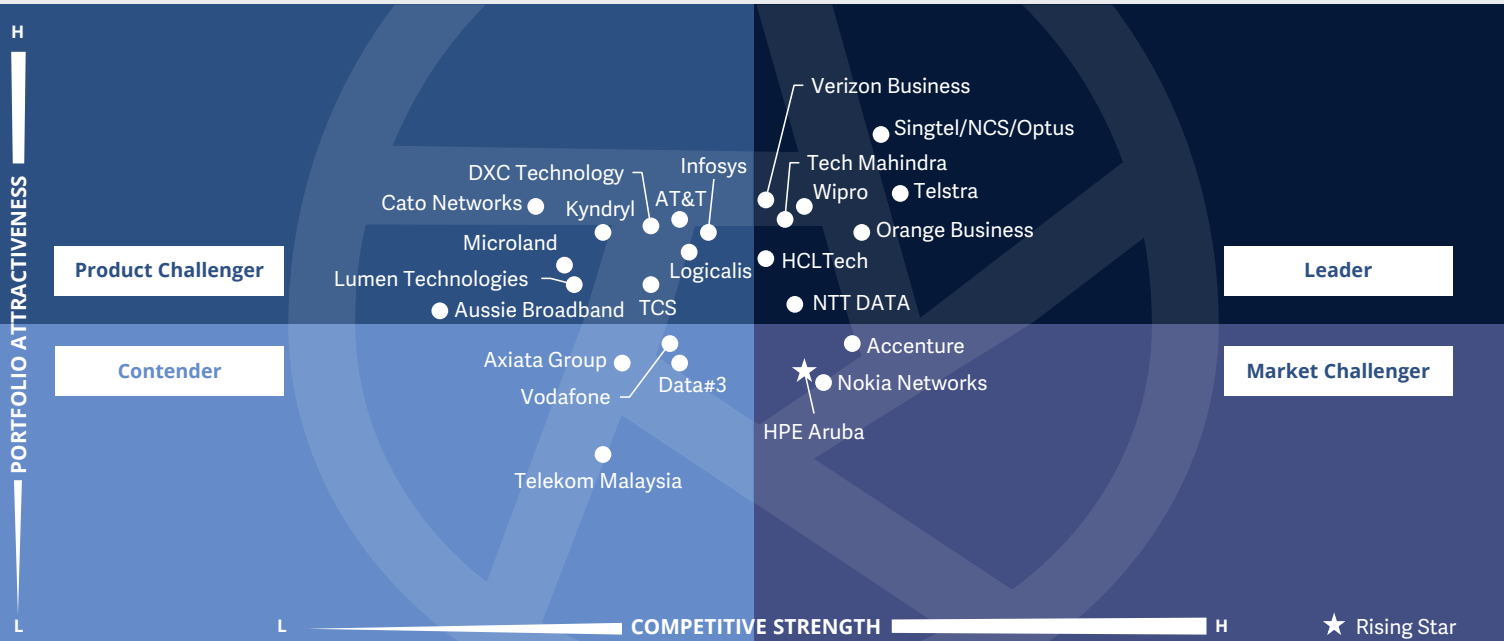


Data analytics professionals should read this report to identify the high-level data that can be analysed after being collected from edge devices to gain actionable insights for improving efficiency, performance or decision-making.



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

APAC 2024



This quadrant assesses providers offering all-inclusive **network edge solutions**, including **private 5G with SD orchestration** and **SD-LAN** addressing enterprise network edge requirements.

Yash Jethani



Edge Technologies and Services (including Private 5G)

Definition

This quadrant analyses vendors that deliver technologies across hardware and software, 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 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 and, thus, back 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



Edge Technologies and Services (including Private 5G)

Observations

Edge computing has been steadily and quickly expanding throughout Asia. This growth can be partially attributed to flexible campus network expansion, ubiquitous cloud access, mobility as well as the growing 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. Network edge, branch edge and remote edge technologies have all seen tremendous growth in recent years.

New technologies and process models are making edge computing in APAC — both developed and developing — a complicated and rapidly expanding economic subject. SDWAN, content delivery networks, internet exchanges, data center, macro cells, set top boxes/CPE, IoT gateways and IIoT sensors as well as drones can all be edges connected via multicloud, SD-LAN, SD-WLAN or SD-MWLAN technologies. Businesses can not only allocate processing power close to the network edge by utilising technologies such as network

function virtualisation (NFV), edge computing and SDN but also monitor edges that lack cloud connectivity and co-develop power-conscious applications within the open-source edge communities. There is also a shift in how enterprises price cloud-based WLAN resources via outcome-based pricing on users, coverage and throughput KPIs instead of devices. Further, many professional services such as configuration, monitoring and troubleshooting are included in the recurring monthly fee.

The use of edge computing is growing YoY due to robust growth in industry verticals in APAC across manufacturing, industrial 4.0, robotic devices, telemetry and the metaverse.

From the 41 companies assessed for this study, 25 qualified for this quadrant, with eight being Leaders and one a Rising Star.

HCLTech

HCLTech offers Industry 4.0 with 5G and Wi-Fi integration, unified service delivery and strong network observability across LAN/WLAN. Its verticalised strategy combined with AIOps for Wi-Fi deployments makes it stand out from its competitors.

NTT DATA

NTT DATA specialises in edge with private 5G and a devices ecosystem with multiple partnerships. It also supports Industry 4.0 solutions and collaborates with niche companies in the satellite, AI and cloud space. Its Edge-as-a-Service offering is differentiated and can support clients in multiple industries.

orange Business

Orange Business leverages its extensive knowledge of networking, cloud computing, security, LAN and industrial IoT (IIoT) to create edge solutions with inherent end-to-end visibility and platform flexibility.

Singtel/NSC/Optus

Singtel/NSC/Optus has formed a Global Telco AI Alliance with SK Telecom, Deutsche Telekom and e& to leverage AI on its 5G network. Its access-agnostic edge solutions and collaborations are helping it to become a digital communications player.

TECH mahindra

Tech Mahindra, with its wireless-first strategy, helps organisations streamline their legacy communications and infrastructure, while its edge cloud offerings, with telecom-specific solutions, set it apart.



Telstra is Australia's largest telecommunications provider, with a growing presence in APAC. Its Telstra Purple division accelerates new services via a consulting-led approach, with a focus on IoT and edge.

Verizon Business

Verizon Business provides network edge solutions, including virtual network services, intelligent Edge, and private 5G/mobile edge computing (MEC) across a multicloud environment. Further, it provides SD-WLAN, AI, orchestration and SD-LAN/SD-WAN integration in complex edge environments across industries.



Edge Technologies and Services (including Private 5G)



Wipro, with its long history in engineering, provides a wide range of edge and 5G solutions in a multicloud setting, including automation, AI and security. With BoundaryLess Universal Edge products, it bridges SD-LAN, SD-WAN and software-defined data centre (SDDC) architectures for both telecom and non-telecom workloads.

HPE Aruba

HPE Aruba (Rising Star) is strengthening its ties in the networking and telecom sectors, with more than 300 telecom clients in 160 countries. Together with Juniper, it will address the emergence of AI inferencing at the edge in APAC.





“Orange Business’ comprehensive range of edge solutions encompasses IoT, uCPE, IIoT and the Evolution platform for multicloud environments. It has a road map to include Wi-Fi 7 and private 5G solutions in most markets in APAC.”

Yash Jethani

Orange Business

Overview

Orange Business is headquartered in Paris, France. It has more than 29,000 employees across over 100 offices in 65 countries. In FY22 the company generated €7.9 billion in revenue, with IT & integration Services as its largest segment. It has over 75 super PoPs (aims to reach 100 by 2025), relies on its global backbone and has a direct presence in more than 100 countries. It is expanding the Evolution Platform deployments offering digital services and co-innovation opportunities. With an inherent strength in IoT, industrial automation and connected infrastructure, it offers superior IT/OT integration and a plethora of managed services.

Strengths

Flexible IoT and SD-branch capabilities:

Orange Business has a broad range of customisable IIoT and IoT solutions, including many industry-specific offerings. It offers SD-Branch options from Cisco/ Meraki and Aruba and Universal Customer Premises Equipment (uCPE) from Ekinops and Cisco. It is also enabling sizeable IT/OT capabilities alongside that of integration of LAN and security. Through its Orange Developer portal, it offers IoT and platform-oriented APIs such as Evolution Platform IaaS, Internet on the Move and Live Identity to clients to drive efficiency.

Efficient platform for network performance and security: Through its fit-for-purpose Evolution Platform, it provides clients with customised software-defined technology

services hosted in a cloud. It supports these with high levels of expertise for proper service chaining and execution, and has the ability to control and monitor the entire path, end-to-end.

Flux Vision mobile analytics: Based on technical data from the Orange mobile network, its Flux Vision mobile data analytics solution uses branch and edge analytics to determine mobile usage patterns, audience statistic indications and mobility patterns and undertakes segmentation of information.

Strong presence in APAC: The majority of the company’s global clients have operations in APAC, and it supports them with over 3,500 personnel. Its regional headquarters are in Singapore.

Caution

As 5G gains traction in APAC, Orange Business needs to hone its edge computing initiatives in the region by looking beyond Equinix as a partner for its bare-metal-as-a-service offering and open up APIs that are edge-application-oriented and tailored for SMBs.





Secure Access Service Edge (SASE)

Secure Access Service Edge (SASE)

Who Should Read This Section

This report is relevant to enterprises across industries in APAC for evaluating providers offering enterprise SASE services.

The quadrant highlights the current market positioning of SASE service providers in APAC and how they address the key challenges of enterprises.

The concept of SASE is gaining traction in the networking and cybersecurity landscape. With the proliferation of cloud connectivity, distributed applications and the rise of various security risks, traditional networking and security models are often inadequate to address these challenges effectively. SASE offers a holistic approach by converging networking and security functionalities into a unified cloud-native service. By integrating SSE features such as SWG, CASB, DLP and FWaaS, it provides enterprises with a versatile and scalable cybersecurity approach.

Enterprises expect service providers to enrich their current network and security offerings portfolio by including cloud-based SASE solutions to complement their existing network infrastructure. Providers reinforce this robust SASE framework by delivering secure cloud resource connectivity in alignment with zero trust principles.

As enterprises look to modernise their branch architecture, they need next-generation SASE solutions and services. Future branch setups demand solutions that enable flexible networks with zero trust security and automated IT processes. Enterprises in APAC prefer MSPs to deploy robust SASE solutions within their network infrastructure, routing all traffic through a global IP backbone.



Cybersecurity professionals should read this report to understand the security capabilities of providers offering consulting and the delivery of other SASE services.



Digital transformation professionals should read this report to understand how providers of SASE services align with their digital transformation journey and how they can be compared to one another.



Networking professionals should read this report to understand SASE service providers for their technical and integration capabilities and partnerships.

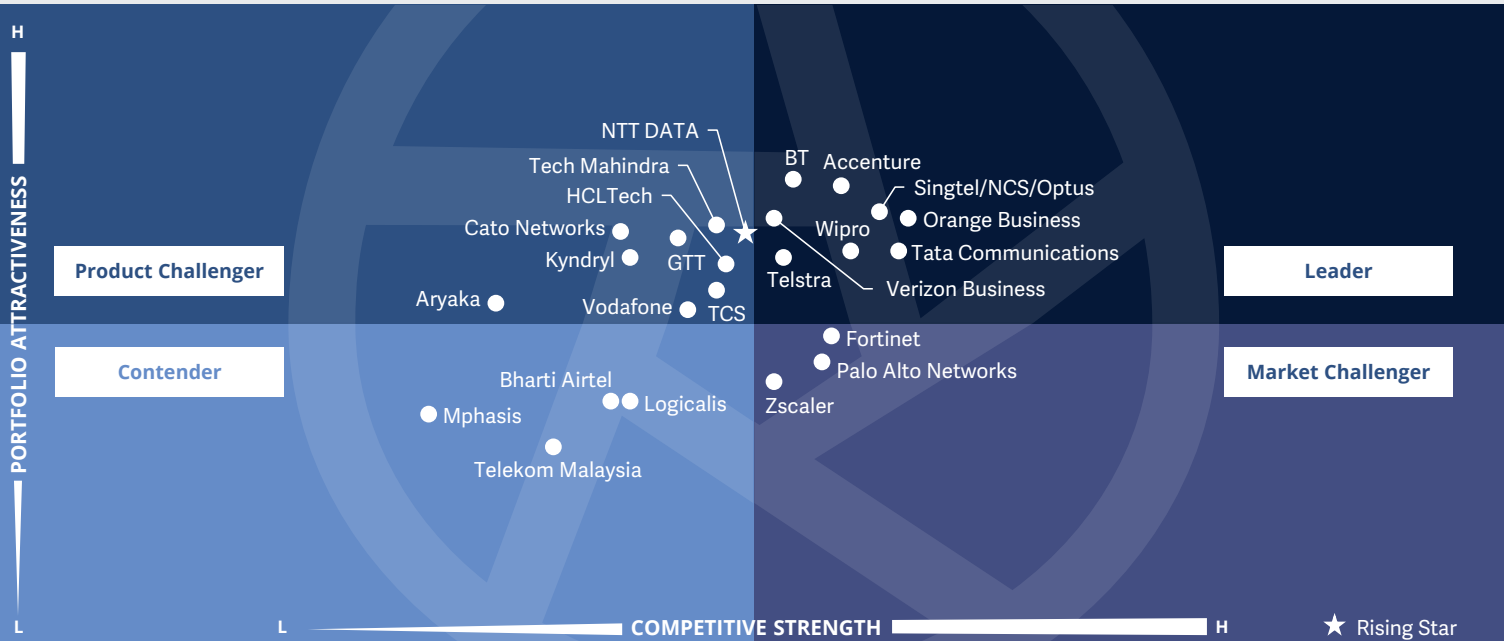


Change management specialists should review this report to grasp how SASE service providers integrate with their organizational change initiatives and assess their relative performance against industry standards.



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

APAC 2024



This quadrant analyses providers offering **SASE solutions and services** that function as comprehensive, **integrated networks and advanced security solutions**, ensuring a secure network from the **core to the network edge** for clients.

Yash Jethani



Secure Access Service Edge (SASE)

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 focussing 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 SDWAN, cloud access security broker (CASB), next-generation firewall (NGFW) and firewall-as-a-service (FWaaS), zero trust network access (ZTNA), data loss prevention (DLP) and secure web gateways (SWG). These encompass secure and integrated access from the data centre (which may include network function virtualisation [NFV]) to branch or edge, including SD-LAN or its wireless or mobile variant.

Suppliers in this area have been increasingly active as advisors 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 centre 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



Secure Access Service Edge (SASE)

Observations

In Asia, the concept of integrated secure enterprise networks has been in place for years. However, in recent years, it has gained popularity under the term secure access service edge (SASE), while many leading telecom providers continue to use the term loosely. The detailed components of SASE have now been agreed upon, transitioning it from a theory to widespread commercial implementation. This includes core-to-edge security and zero trust with integrated SD-WAN provided by reputed global vendors offering robust solutions. SASE is a rapidly growing field in Asia's enterprise transformation and network industry, and it is expected to find increasing relevance across industries in the coming years. This trend is partly driven by the emergence of new disruptive players focussed on SASE, in addition to established telecom providers and SIs partnering with leading SASE solution providers to deliver comprehensive end-to-end secure network transformation for their clients.

Security service edge (SSE) is used to refer to a group of cloud-based security products, including ZTNA, FWaaS, SWG and CASB. To create a less complete but SASE-like solution within an organisation, SSE can integrate with, and complement, existing SD-WAN. The full SASE architecture, as defined by our quadrant, combines and integrates SD-WAN with a full suite of security tools, including (at the minimum) CASB, SWG, FwaaS, and ZTNA, inside a cloud infrastructure. These SSE tools comprise roughly half to two-thirds of this architecture but the actual usage varies in customer deployed locations.

From the 41 companies assessed for this study, 24 qualified for this quadrant, with eight being Leaders and one a Rising Star.

accenture

Accenture provides a range of SASE solutions with its cloud-first network strategy in combination with ZTN security across the design, build, deploy and operate phases.

BT

BT supports multivendor as well as single-vendor ecosystems through its thoroughly tested SASE solutions with extensive partnerships, proprietary frameworks and integration exercises that complement its customer centricity.

Business

Orange Business offers a distinctive value proposition in the market due to its platform-based approach to network and security services, as well as its proficiency in professional services, partner technologies, super points of presence (PoPs) and automation.

Singtel

Singtel differentiates itself through its 3R approach to end-to-end managed security services and its patented platform-led security solutioning strategy, assisting clients in their SASE journey.

Tata Communications

Tata Communications' SASE solution targets large and midsize businesses in the region with flexible deployment and pricing options. Its product road map reflects a clear understanding of customers' evolving needs.



Telstra's SASE solutions encompass single and dual vendor deployments, which align with the market needs for adaptive networks.

Verizon Business

Verizon Business offers a comprehensive suite of customisable, vendor-neutral SASE solutions and products delivered as a service, catering to specific customer needs and enabling flexible pay-as-you-go options.



Secure Access Service Edge (SASE)



Wipro offers SASE solutions with a focus on the optimisation of performance and security packages, with bots providing due assistance in a self-healing and self-patching environment as a managed security service.

NTT DATA

NTT DATA (Rising Star) provides SASE solutions for end-to-end support services, from consulting, designing, building and operating to optimising. It offers consultation on cloud, DevOps, SD-WAN, security, software defined infrastructure, hybrid IT, 5G, as well as managed network services.





“Orange Business combines multivendor, multicloud and multi-networking solutions from its partners with a plethora of advanced network and security services – centred around the Evolution Platform, the foundation of its digital infrastructure strategy in APAC.”

Yash Jethani

Orange Business

Overview

Orange Business is headquartered in Paris, France. It has more than 29,000 employees across over 100 offices in 65 countries. In FY22 the company generated €7.9 billion in revenue, with IT Services as its largest segment. It has over 75 super PoPs, relies on its global backbone and has a direct presence in more than 100 countries. It has over 3,000 security experts and 5,000 SDx experts to optimise enterprise IT. The company offers a full stack of services, from backbone convergence, automation and mobile services to virtualised services. It offers SASE services under managed secure access (MSA), flexible SD-WAN and flexible applications access.

Strengths

SSE expertise: Orange Business offers a range of managed security services, including next-generation endpoint management and vulnerability management to support SASE solutions. This is made possible by Orange Cyberdefense’s expertise and SSE partnership with leading vendors such as Fortinet, Palo Alto and Netskope. It uses a zero trust framework that permits private access, cloud access and secure internet access.

Unique offerings: Orange Business’ Evolution Platform, with its co-innovate/co-development strategy with partners and overall network security and performance, provides a unique set of network services. Additionally, it offers an integrated SASE solution, guaranteeing smooth end-to-end


integration and optimisation of current adaptable SD-WAN systems, while offering secure cloud connectivity to remote users.

Huge partner/service ecosystem: Orange Business integrates its Evolution Platform with partner technologies covering a range of areas, including multicloud networking, communication and collaboration, on-demand cloud connectivity, SD-WAN gateways, security service edge (SSE) and next-generation firewalls in response to the growing need for network and security convergence.

Caution

Orange Cyberdefense and the Evolution Platform support a wide range of services that Orange Business focusses on, but the company does not focus as much on highlighting each service’s distinctive selling point in APAC.





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.



Appendix

The ISG Provider Lens 2024 – Network – Software Defined Solutions and Services research study analyzes the relevant software vendors/service providers in the global market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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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



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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.



Author & Editor Biographies

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™

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.

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*ISG

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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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