

Network – Software-Defined Solutions and Services

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



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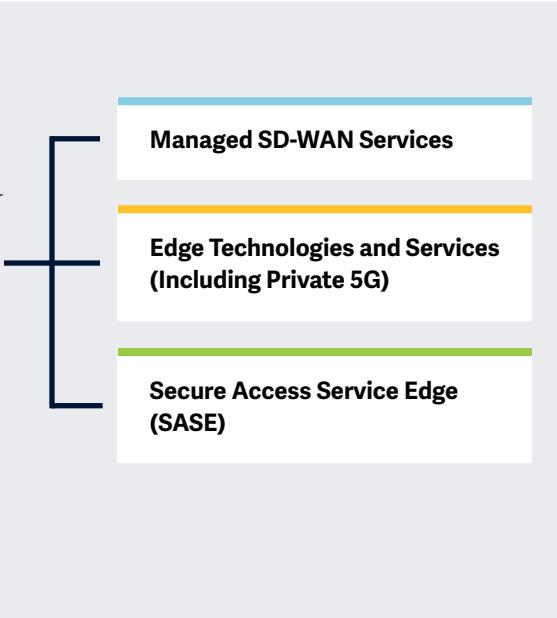
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The ISG Provider Lens® Network — Software-Defined Solutions and Services 2026 study examines the shift toward software-driven, policy-based and increasingly AI-enabled enterprise networking. As organizations modernize networks to support distributed workforces, cloud consumption, edge deployments and AI-driven workloads, software-defined architectures have become central to agility, resilience and security. This study focuses on fully managed, software-defined networking solutions that combine virtualization, programmability, orchestration and cloud-integrated security within modern, consumption-oriented contractual models. It excludes legacy network underlays and standard connectivity services, ensuring an equivalent comparison of providers operating in the software-defined networking ecosystem. The research complements the ISG Provider Lens® Enterprise Managed Network Services study by concentrating on higher-value, software-centric capabilities.

Key evaluation areas include edge technologies and services such as SD-LAN, u/vCPE and IoT enablement, extending from branch environments to private mobile networks supported by 5G. The study also analyzes network security architectures, including secure access service edge (SASE) and security service edge (SSE), and how providers integrate SD-WAN with cloud-delivered security controls. By identifying evolving enterprise requirements and provider differentiation across software-defined networking, edge and security domains, this research supports informed sourcing and partner-selection decisions. It is delivered as part of ISG's Provider Lens® research program, applying transparent evaluation criteria aligned with real-world enterprise expectations.



Key focus areas and analysis points of the study are **SD-networks**, **network edge** and **SASE/SSE solutions and services** in 2026



Simplified Illustration Source: ISG 2026

Definition

The ISG Provider Lens® Network – Software-Defined Solutions and Services 2026 study offers the following to business and IT decision makers:

- Transparency on the strengths and weaknesses of relevant providers.
- A differentiated positioning of providers by segments on their competitive strengths and portfolio attractiveness.
- Focus on different markets, including ANZ, Germany, the U.K. and the U.S.

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



Definition

This quadrant evaluates providers of managed SD-WAN solutions delivered as fully managed or co-managed as-a-service solutions, regardless of the network hardware and software used. SD-WAN solutions optimize network operations for enterprises from the core to the edge.

Providers deliver centralized policy design, cloud-hosted control plane operations, AI-driven dynamic routing optimization, zero-touch deployment, multi-vendor SD-WAN platform integration and AI-enhanced visibility and monitoring across the WAN. They also support hybrid transport environments, integrate security functions through SASE/SSE and unify management across distributed sites and multicloud environments.

Beyond operations, this quadrant evaluates providers' consulting-led modernization approach, migration design, cost-to-serve modeling and policy framework rationalization capabilities to ensure organizations can build cohesive SD-WAN roadmaps.

Eligibility Criteria

1. **Managed SD-WAN service portfolio** with centralized cloud-based orchestration and cloud native networking
2. Ability to **deliver** and manage all hardware and software components, as well as have **operational control** of SD-WAN policies, configuration and lifecycle services (monitoring and incident response)
3. Ability to **effectively replace or integrate** (as required) multiprotocol label switching (MPLS)-based WANs with SD-WAN or hybrid systems
4. **Complete orchestration and management capabilities** for the
5. **Proven capability** in seamlessly implementing new services and networks in commercial deployments, which are **multi-site enterprise deployments** with defined service tiers and SLAs
6. **Comprehensive and stable road mapping abilities**, allowing updates as required
7. Reference customer, cultural alignment or site **volume in deployment**
8. **Competitiveness** of offerings and types of commercial terms

needed control of the new SD-WAN network, including AI and automation (AIOps) and intent-based networking



Definition

This quadrant focuses on software-defined edge architectures, including SD-Branch, SD-LAN, IoT/IoT integration, private 5G and multi-access edge computing (MEC)-based compute environments, which enhance intelligence, security and automation at the enterprise level.

Providers deliver cloud-managed edge platforms, vCPE, localized data processing, low-latency traffic handling and secure device connectivity across industrial, branch and remote environments. Integration with SD-WAN and SASE ensures consistent policy- and identity-aware access from cloud to edge. This evaluation also includes providers' ability to deliver strategic core to edge advisory, private 5G and IoT delivery, and operational readiness assessments, modernizing distributed operations and aligning edge investments with OT/IT convergence objectives. AI-driven edge processing; lightweight, containerized edge networking stacks for IoT/IoT; and private 5G via RAN-intelligent controllers are included in the scope as well.

Eligibility Criteria

1. **Product portfolio coverage**, focus areas and completeness of modular or area solutions - software-defined edge platforms (SD-LAN, SD-Branch, vCPE/uCPE, MEC or private 5G) and/or device onboarding, policy control, firmware orchestration and analytics.
2. **Ability to integrate** into broader managed or orchestrated solutions and **demonstrate operational responsibility** for managing edge devices, policies, updates and cloud controllers
3. **Understanding of the overall market**, technology environment and contributions to the same, along with **industry-specific knowledge and experience with deployed references**
4. **Scope of partnerships and offerings** and management capability of disparate providers and solutions within a customer project that can have **distributed edge footprints**, with capabilities suited for industrial, branch or remote operational environments
5. **Reference customers** or solutions in commercial deployments having **edge-to-cloud integration** or **private cellular network** service delivery with software-defined private 5G cores, cloud-managed small cells
6. Competitiveness of offerings and **types of commercial terms**



Definition

The quadrant evaluates cloud-native, identity-driven security architectures that unify networking and security across users, devices, applications and distributed enterprise environments.

SASE combines SD-WAN with cloud-delivered security functions, while SSE delivers security independently for SD-WAN environments. Providers are assessed on unified policy models, low-latency security enforcement, zero trust alignment and multi-vendor or single-pass integrated architectures. The scope also includes consulting-led security posture baselining, SASE/SSE architecture blueprinting, and identity strategy and transformation roadmap development, which enable enterprises to transition from fragmented security models toward fully integrated, cloud-delivered architectures. API-driven policy federation across multiple identity providers, and unified security data planes with programmable policy engines delivered through cloud POPs, are also included.

Eligibility Criteria

1. Product **portfolio coverage** with fully integrated, broader solutions linking to cloud-delivered security stack and data centers or other enterprise IT applications and systems
2. Membership or affiliation (including inputs) with **global SASE technical and trade groups**
3. Ability to enable clients to **reuse their existing network** and ICT solutions, not merely rip and replace
4. Expertise in delivering **training and** providing **testing** for clients, along with **end-to-end** management of configurations, policies and user access
5. **Industry-specific knowledge** and experience mapped to the client type and various multicloud/hybrid environments with consistent security policies
6. **Scope of partnerships and offerings** and management capability for the needed orchestration within a customer project that provides **identity-aware, zero trust enforcement**
7. **Reference customers or solutions** in commercial deployment with a **managed or co-managed service**, including tuning, threat response guidance and policy lifecycle
8. **Competitiveness of offerings** and types of commercial terms



Quadrants by Region

As part of this ISG Provider Lens® quadrant study, we are introducing the following three quadrants on Network – Software-Defined Solutions and Services 2026.

| Quadrant | Germany | U.K. | U.S. | ANZ |
|---|---------|------|------|-----|
| Managed SD-WAN Services | ✓ | ✓ | ✓ | ✓ |
| Edge Technologies and Services (Including Private 5G) | ✓ | ✓ | ✓ | ✓ |
| Secure Access Service Edge (SASE) | ✓ | ✓ | ✓ | ✓ |



The research phase falls in the period between January and February 2026, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in June 2026.

| Milestones | Beginning | End |
|-----------------------------|------------------|-------------------|
| Survey Launch | January 30, 2026 | |
| Survey Phase | January 30, 2026 | February 27, 2026 |
| Sneak Preview | May 20, 2026 | |
| Press Release & Publication | June, 2026 | |

Collecting client testimonials via the Star of Excellence Program requires early client referrals (no official reference needed) because CX scores have a direct influence on the provider's position in the IPL quadrant and the awards.

Please refer to the [link](#) to view/download the ISG Provider Lens® 2026 research agenda.

Access to Online Portal

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

Buyers Guide

ISG Software Research, formerly "Ventana Research," offers market insights by evaluating technology providers and products through its Buyers Guides. The findings are drawn from the research-based analysis of product and customer experience categories, ranking and rating software providers and products to help facilitate informed decision-making and selection processes for technology.

In the course of the Network — Software-Defined Services and Solutions 2026 IPL launch, we want to take advantage of the opportunity to draw your attention to related research and insights that ISG Research will publish in 2026. For more information, refer to the [Buyers Guide research schedule](#).

Research Production Disclaimer:

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



ISG Star of Excellence™ — Call for nominations

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

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

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

Our vision for the Star of Excellence is to become acknowledged as the leading industry recognition for client service excellence and serve as the benchmark for measuring client sentiments.

To ensure your selected clients complete the feedback for your nominated engagement, please use the "Nominate (for Providers)" section on the Star of Excellence™ [website](#).

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

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



ISG Star of Excellence



Methodology & Team

The ISG Provider Lens® 2026 – Network – Software-Defined Solutions and Services study analyzes the relevant software vendors/service providers in the global market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

Study Sponsor:

Heiko Henkes

Lead Author:

Kenn Walters and Yash Jethani

Research Analyst:

Shatakshi Singh

Data Analyst:

Sibasis Panigrahy

Project Manager:

Abhilash M V

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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 service providers and analysis of publicly available market information from multiple sources. The data collected for this report represent information that ISG believes to be current as of March 2026 for providers that actively participated and for providers that did not. ISG recognizes that many mergers and acquisitions may have occurred since then, but this report does not reflect these changes.

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



Contacts For This Study

Study Sponsor



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Provider Lens® Study
Sponsor**



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Yash
Jethani
**Principal Analyst,
ANZ and U.K.**



Shatakshi
Singh
Research Analyst



Sibasis
Panigrahy
Data Analyst



Abhilash
M V
**Global Project
Manager**



ISG Provider Lens® Advisors Involvement Program

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

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

The consultant advisors:

- Help define and validate quadrants and questionnaires,
- Advise on service provider inclusion, participate in briefing calls,
- Give their perspectives on service provider ratings and review report drafts.

ISG Advisors for this study



Jon
Harrod

Partner



Dr. Christian
Weber

Principal Consultant



Liam
Chin

Director



Invited Companies

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

* Rated in previous iteration

| | | | |
|------------------------------|--------------------|---------------------|--------------------------------|
| A10 Networks | Aussie Broadband* | Canonical Group Ltd | Comcast Business* |
| Accenture* | Aviatrix | Capgemini* | Computacenter* |
| Acronym solutions | Axiants* | Cato Networks* | Controlware* |
| AD Network Solutions | Bankai Group | CCS Media | Crown Castle |
| Advatek | Barracuda Networks | CDW* | CyberCX |
| Akamai | Bechtle* | Centrify | Cyient |
| Allied Telesis Holdings K.K. | BECOM | Cisco | Damovo* |
| Apcela* | Black Box | Citrix | Data#3* |
| Appex Networks* | Blaze Networks | Claranet | Datacom |
| APX Net, Inc | Boldyn Networks* | Clarke Telecom | Deloitte |
| Aqovia | Breeze Networks | Cloudflare | Deutsche Telekom* |
| Arista* | Brennan IT | Coevolve | Dicker Data |
| Aryaka* | BT* | Coforge | Dragonfly Technologies Pty Ltd |
| AT&T* | Cambium Networks | Cognizant* | DXC Technology* |
| Atos | CANCOM* | Colt* | DXN limited |



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* Rated in previous iteration

| | | | |
|--------------------|--------------------------|--------------------------------------|----------------------|
| Edgecore Networks* | Fortinet | Illumio | Lightstorm |
| Edotco* | Fujitsu* | Inde | Logicalis* |
| Empired | Globalgig* | Infoblox | Lumen Technologies* |
| Epsilonitel | Gorilla Technology Group | Infoline Tec Group Berhad | Macnica* |
| Equinix | Graphiant | Infosys* | Macquarie Telecom* |
| Ericsson | GTT* | Interactive | Masergy |
| Evolving Networks* | HCLTech* | Intervision | Mavenir Systems |
| Expereo* | HGC Global Communication | Intuitive Systems and Networks (ISN) | Maxis |
| Exponential-e* | Hitachi Digital Services | Intuitiorit | Megaport |
| Extreme Networks* | HPE Aruba* | Juniper Networks | MetTel |
| EY | hSo | KDDI Corporation | Microland* |
| F5 Networks | Huawei | Kerv | MikroTik |
| FatPipe* | Hubify Limited | KPMG | Mitsubishi Electrics |
| flexiWAN* | IBM | Kyndryl* | Mphasis* |
| Forcepoint | IIJ Global Solutions | Lancom | DXN limited |



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|------------------------------|---------------------------|-------------------------------|-------------------|
| nacXwan | NVIDIA | Sencinet | TCS* |
| Natilik | Onecom Limited (UK) | Sify Technologies | Tech Mahindra* |
| NDS Ltd | Open Systems* | Singtel/NCS/Optus* | Telefónica* |
| NEC | Orange Business* | Softbank | Telekom Malaysia* |
| Neos Networks | Palo Alto Networks | Softcat* | Telent* |
| NetBird | PCCW Global | Solarwinds | Telkom Indonesia |
| Netconsulting | Pica8* | Sonic Wall* | Telstra* |
| Netskope | Protos Networks | Sophos Group* | Terago |
| Nexion Networks* | Pulsant | Spark New Zealand | Thales |
| Nokia Networks | Red River* | Stream Networks | T-Mobile* |
| Nomios | Redcentric* | STT | TNF |
| Northrop Grumman Corporation | Riedel Networks* | Superloop Limited (Australia) | TPG Telecom |
| NRI Australia & New Zealand | Riverbed | Syringa networks | TPX |
| NTT DATA* | SAS Global Communications | Tailscale | TrustWave |
| Nuvias | SecureWorks | Tata Communications* | Unisys |



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* Rated in previous iteration

| | |
|-------------------|-----------------------|
| UST | World Wide Technology |
| Vectra | Yash Technologies |
| Ventia | Zenlayer |
| Verizon Business* | Zensar Technologies* |
| Versa | Zscaler |
| Vertiv | ZTE Corporation |
| Virtusa | |
| VMO2B* | |
| Vmware | |
| Vocus | |
| Vodafone* | |
| Vonex | |
| VVDN | |
| Wavenet* | |
| Windstream | |



*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.

ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens® research, please visit this [webpage](#).

*ISG Research™

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

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

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

*ISG

ISG (Information Services Group) (Nasdaq: III) is a leading global AI-centered technology research and advisory firm. A trusted partner to more than 900 clients, including 75 of the world's top 100 enterprises, ISG is a long-time leader in technology and business services sourcing that is now at the forefront of leveraging AI to help organizations achieve operational excellence and faster growth.

The firm, founded in 2006, is known for its proprietary market data, in-depth knowledge of provider ecosystems, and the expertise of its 1,600 professionals worldwide working together to help clients maximize the value of their technology investments.

For more information, visit isg-one.com.





JANUARY, 2026

BROCHURE: NETWORK – SOFTWARE-DEFINED SOLUTIONS AND SERVICES