ISG Provider Lens™

Network — Software Defined Solutions and Services

Managed (SD) WAN Services

A research report comparing service provider strengths and competitive differentiators

Customized report courtesy of:

COMCAST BUSINESS

QUADRANT REPORT | JUNE 2022 | U.S.

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Report Author: Dr. Kenn D Walters

Rapid evolution toward end-to-end secure SD networks

Networks and software-defined solutions and services encompass many technological topics, business coverage areas, organizational functions, and business processes and methods. In addition, these are closely tied to the overall digital business transformation and cloudification trends of enterprises globally. This ISG Provider Lens™ study examines different kinds of network offerings related to software-defined networking in the U.S. These include SD-WAN and associated core and mobility technologies and service offerings related to these segments, transformation services, the increasingly crucial edge technologies and Secure Access Service Edge (SASE). This study considers the changing market requirements and provides a consistent market overview of the segments. It also gives concrete decision-making support to help user organizations evaluate and assess the offerings and performance of providers.

Enterprises are evaluating various means to increase their agility, flexibility, competitiveness, delivery structures and remote working and continuity practices. A large part of this challenge is not only associated with technology use, but also with the transformation of established processes and traditional management practices. Enterprises are also analyzing how companies can achieve a sufficient degree of flexibility, speed and collaboration internally and across and outside of enterprise boundaries securely, while being able to master their challenges to deliver benefits

SD networks—foundations for future safe networks.

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to themselves and their (ever more mobile) customers and users, including at the edge of the business and edge of the traditional network.

Enterprise agility goes far beyond traditional network abilities and provisioning capabilities in a constantly changing competitive environment. CEOs and chief technology officers (CTOs) must understand that software-defined networking works together with cloudification, intelligent edge and mobility strategies, along with digital business transformation areas such as AI, IoT, automation and collaboration. These collectively have a high influence on agility, flexibility, productivity and profitability across enterprises.

In the U.S., some of the primary factors driving these rapid changes in enterprises are as follows:

Increasing flexibility and agility, while simplifying management: Enterprises are increasingly focusing on improving the integration, automation, orchestration and management of network resources and processes. This has evolved to encompass software-defined networking. By moving its control layer to the cloud, SD-WAN can operate and be managed in real time via a one-touch or single-pane-of-glass, fully integrated management and reporting tool, coupled with the use of policy and automation. This trend is being driven by enterprises' desire to seamlessly add applications and network resources to meet business and user goals more efficiently and securely without creating silos or depending on single vendors.

Support for cloud and multicloud migrations: Enterprises are increasingly focused on migrating their IT and network operations into the cloud. SD networks have been proven to assist with this by reducing complexity and enabling a reduced risk migration to single or multicloud environments for enterprises.

Increasing security across networks, including cloud-based networks: Network security has become a major point of concern across business units and enterprises, in line with the changes within modern networks and the expectations of full security from core to edge in all networks enabled or simplified by SD-networking, which is vital in provisioning cloud-based and hybrid networks. Integrated secure enterprise networks (ISEN), also described as secure access, secure edge (SASE), are increasingly being deployed with advanced security aspects across all areas of modern integrated networks.

Consuming managed or co-managed service, while increasing customer satisfaction and sales: The client experience can be enhanced by allowing them to consume via modern payment terms and conditions in a fully managed or co-managed manner, while retaining or enhancing the ability to respond quickly and seamlessly to customer enquiries and rapidly provide (often automatically) new services via SD networks. At the same time, this tends to boost sales and retain customers, while sinking staffing costs in the enterprise. This has become crucial to many enterprises.

Forming a basis for new or near-term innovative technologies and solutions: Digital business transformation and many new innovations (such as intent-based networks, AI/machine learning-driven solutions, services and systems, rapid hot spot provisioning and data flow allowance, self-healing networks, intelligent edge and edge computing, and SASE) require the flexibility and abilities of SD networks to be utilized fully and drive solutions to their full potential.

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Executive Summary

Most telecommunication service suppliers and network service suppliers, as well as systems integrators, have an impressive portfolio of SD-WAN and other SD network solutions. These range from partial or function-specific solutions to complete end-to-end SD-WAN or SD network solutions, with many solutions differing based on the enterprise size, scope of offering, industry type, or desired reach and interaction between enterprises and customers or end users. Others have introduced other advanced SDN-based technological innovations such as intent-based networks that use AI/machine learning interactions and control, or edge intelligence and computing solutions, with SD-LAN or SD-wireless or wireless and mobile LAN (SD-WLAN or SD-WMLAN), sometimes coupled with enterprise 4G/5G mobility solutions inherently in use. This is further driven by the transition of many enterprises to cloud and multicloud environments, which are well supported by SD networks, from enterprise core to edge. Further change is apparent with the early implementation around fully ISEN environments (SASE), with strong growth forecasted over the next 12 to 24 months.

SD networks utilized in advanced next-gen network deployments and SASE.

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Provider Positioning

Page 1 of 5

	Managed (SD) WAN Services	SDN Transformation Services (Consulting and Implementation)	Enterprise Networks Technology and Service Suppliers	Edge Technologies and Services	Secure Access Service Edge (SASE)
Apcela	Product Challenger	Leader	Leader	Leader	Not In
Arista	Not In	Not In	Contender	Not In	Not In
Aryaka	Product Challenger	Not In	Not In	Not In	Product Challenger
AT&T	Leader	Leader	Leader	Leader	Leader
BT	Product Challenger	Not In	Not In	Not In	Not In
CANCOM	Not In	Not In	Not In	Product Challenger	Not In
Cato Networks	Not In	Product Challenger	Leader	Product Challenger	Leader
Centrify	Not In	Not In	Contender	Not In	Not In
Cisco	Not In	Not In	Leader	Product Challenger	Leader
Citrix	Contender	Not In	Not In	Not In	Not In

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Provider Positioning

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	Managed (SD) WAN Services	SDN Transformation Services (Consulting and Implementation)	Enterprise Networks Technology and Service Suppliers	Edge Technologies and Services	Secure Access Service Edge (SASE)
Colt	Product Challenger	Product Challenger	Not In	Not In	Product Challenger
Comcast Business	Leader	Leader	Market Challenger	Not In	Not In
Computacenter	Not In	Contender	Not In	Not In	Not In
Crown Castle	Not In	Market Challenger	Not In	Not In	Not In
Extreme Networks	Not In	Product Challenger	Product Challenger	Leader	Not In
FatPipe	Not In	Not In	Contender	Contender	Not In
FlexiWAN	Not In	Not In	Not In	Contender	Not In
Fortinet	Not In	Not In	Not In	Not In	Market Challenger
GTT	Leader	Product Challenger	Not In	Not In	Product Challenger
HCL	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger

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Provider Positioning

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	Managed (SD) WAN Services	SDN Transformation Services (Consulting and Implementation)	Enterprise Networks Technology and Service Suppliers	Edge Technologies and Services	Secure Access Service Edge (SASE)
HPE Aruba	Not In	Not In	Product Challenger	Leader	Not In
IBM	Not In	Leader	Not In	Product Challenger	Not In
Infosys	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Contender
Juniper Networks	Not In	Leader	Leader	Not In	Not In
Logicalis	Product Challenger	Product Challenger	Not In	Not In	Not In
Lumen	Leader	Leader	Product Challenger	Leader	Leader
MetTel	Product Challenger	Not In	Product Challenger	Not In	Not In
Microland	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Mphasis	Not In	Not In	Not In	Product Challenger	Not In
Nokia	Not In	Not In	Not In	Market Challenger	Not In

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Provider Positioning

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	Managed (SD) WAN Services	SDN Transformation Services (Consulting and Implementation)	Enterprise Networks Technology and Service Suppliers	Edge Technologies and Services	Secure Access Service Edge (SASE)
NTT	Leader	Product Challenger	Not In	Not In	Product Challenger
Open Systems	Product Challenger	Not In	Not In	Not In	Contender
Orange Business Services	Leader	Leader	Leader	Leader	Leader
Palo Alto Networks	Not In	Not In	Not In	Not In	Contender
Pica8	Not In	Not In	Contender	Contender	Not In
Talari Networks	Not In	Not In	Product Challenger	Not In	Not In
Tata Communications	Product Challenger	Not In	Not In	Not In	Product Challenger
TCS	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Not In
Tech Mahindra	Product Challenger	Rising Star ★	Product Challenger	Product Challenger	Product Challenger
Telefónica	Not In	Product Challenger	Not In	Not In	Not In

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Provider Positioning

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	Managed (SD) WAN Services	SDN Transformation Services (Consulting and Implementation)	Enterprise Networks Technology and Service Suppliers	Edge Technologies and Services	Secure Access Service Edge (SASE)
T-Mobile	Leader	Product Challenger	Product Challenger	Leader	Leader
Verizon	Leader	Leader	Leader	Leader	Leader
Versa	Product Challenger	Not In	Product Challenger	Not In	Product Challenger
VMware	Not In	Not In	Leader	Not In	Rising Star ★
Vodafone	Product Challenger	Not In	Not In	Not In	Not In
Windstream	Contender	Not In	Not In	Not In	Not In
Wipro	Leader	Leader	Leader	Rising Star ★	Leader
Zensar	Contender	Contender	Not In	Not In	Not In

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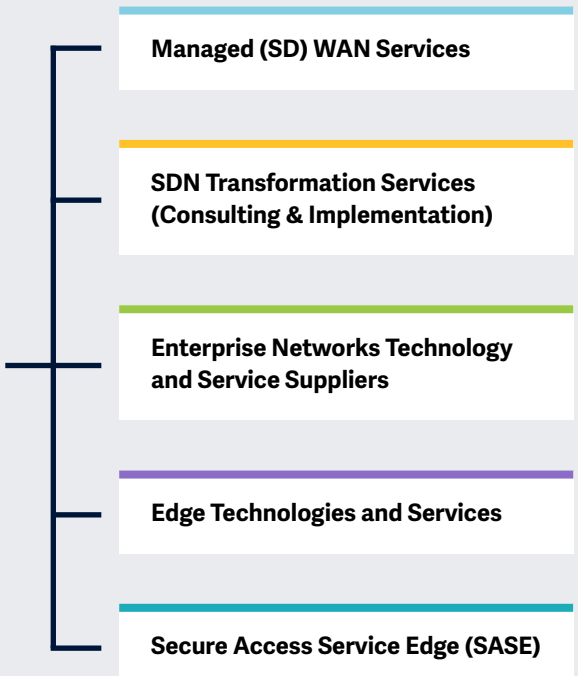
This study focuses on critical segments of SD Networking in 2022



Simplified Illustration Source: ISG 2022

Definition

This ISG Provider Lens™ study, Network — Software Defined Solutions and Services 2022, examines various kinds of global network offerings related to enterprise networks and software-defined networking. These include software defined wide area networks (SD-WAN), which include managed SD-WAN services, consulting and advisory services and implementation support. The study focuses on enterprise network technology and services supply, concentrating on providers of all technology and services related to networks that enterprises implement and operate themselves, (including full and partial SD~WAN solutions, OSS/BSS), covering all areas from the network core to edge-branch technology and services. The study also looks at edge technologies and services, including Internet of Things (IoT, universal/virtual customer premises equipment, or u/vCPE) and software-defined local area networks (SD-LAN) including the ones delivered through mobile and 4G/5G technologies and the service offerings related to these segments. In addition, the study will examine secure access service edge (SASE), which is a fast growing, overarching, secure and fully integrated network environment for businesses.

Enterprises are evaluating various means to increase their agility, flexibility, competitiveness, delivery structures and remote working and continuity practices. This is mainly due to the impacts of COVID-19 pandemic globally during 2020 and 2021. A large part of this challenge is not only associated with technology use, but also with the transformation of established processes and traditional management practices. Enterprises are also analyzing how companies can achieve a sufficient degree of flexibility, speed and collaboration internally and across and outside of enterprise boundaries, while

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being able to overcome their challenges, to deliver the benefits to themselves and their (ever more mobile) customers and users. Enterprises want to realize these benefits at the edge of the business and edge of the traditional network, in a highly secure manner. This adjustment and the speed at which it is realized are relevant and critical for the entire enterprise organization and value stream. Enterprises must understand that software-defined networking works together with cloudification, intelligent edge and mobility strategies, along with digital business transformation areas such as AI, IoT, machine learning and automation and collaboration. They also want to examine and potentially implement overarching strategies linking business goals, security and networking together into fully integrated architecture and systems such as SASE. These collectively have a high influence on agility, flexibility, productivity, security, customer/user satisfaction and profitability.

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Scope of the Report

In this ISG Provider Lens™ quadrant study, ISG includes the following five quadrants on Managed (SD) WAN Services, SDN Transformation Services (Consulting and Implementation), Enterprise Networks Technology and Service Suppliers, Edge Technologies and Services and Secure Access Service Edge (SASE) solutions

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

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments
- Focus on regional market

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

Provider Classifications

The provider position reflects the suitability of providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the IT service requirements from enterprise customers differ and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation of the IT 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 IT 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 US$20 million and US$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 US$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 Challenger, Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens quadrant may include service providers that ISG believe 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).

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Provider Classifications: Quadrant Key

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

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

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

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

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

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

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Managed (SD) WAN Services

Who Should Read This

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

The quadrant report aims to highlight the network services and solutions proficiency of select providers, enabling enterprises to choose the right partner for network transformation.

ISG observes a demand among enterprises for managed WAN services to outsource their IT functions. They also want to purchase them along with consulting and professional services to assess, design and implement their enterprise networks in on-going operations.

Many enterprises struggle with digital transformation and may not have the right set of tools or resources. Service providers address this challenge by offering various service options ranging from physical management to monitoring and notifying to full management. They have extensive experience with managed takeovers (MTOs) where they can assume service management even if the underlying transport is not their own. Enterprises in the region are increasingly looking for managed SD-WAN services, and many of them are moving toward network-as-a-service infrastructure to augment their enterprise digital transformation efforts.

IT and network management leaders should read this report to understand the relative positioning and capabilities of providers that can help them effectively consume managed SD-WAN services. The report also shows how the technical and integration capabilities, as well as partnerships, of service providers differ from the rest.

Digital transformation professionals should read this report to understand how providers of managed SD-WAN services fit their digital transformation initiatives and how they compare to one another.

Cybersecurity leaders should read this report to understand the current state of security capabilities associated with the providers of consulting and other SD-WAN transformation services.

Procurement professionals should read this report to learn more about managed SD-WAN service suppliers, as payment schemes for such services are often based on SLAs and KPIs being met, including levels of service and quality of service. Some providers also offer pay-as-you-consume or similar payment arrangements rather than traditional payment models.

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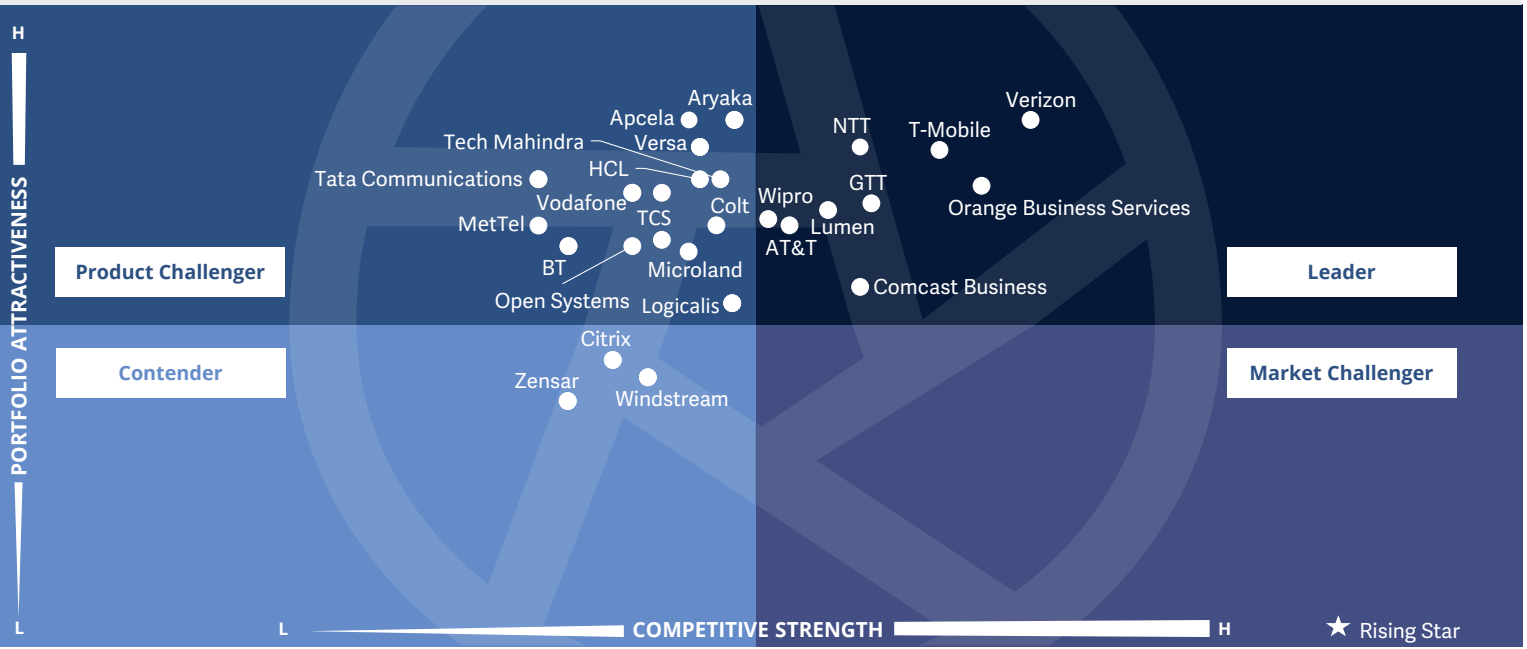
ISG Provider Lens™

Source: ISG RESEARCH

Network - Software Defined Solutions and Services
Managed (SD) WAN - Services

U.S. 2022



This quadrant addresses the providers of enterprise WAN (primarily enterprise SD-WAN or hybrid MPLS/IP WAN) **that deliver managed solutions** and associated services to enterprise clients **to enable innovative and next-generation networking.**

Dr. Kenn D Walters

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Definition

SD-WAN provides the benefits of software-defined technology over traditional hardware-based networking. It is an overlay architecture with a networking foundation that is easier to manage than legacy WANs, essentially moving the control layer to the cloud and, in the process, centralizing and simplifying network management. This overlay design abstracts software from hardware, enabling network virtualization and making the network more elastic. 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) as well as 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 rearchitect (as required) the existing MPLS-based WANs into hybrid-WAN systems
4. Management capability for the needed orchestration and control of the overall architecture
5. Flexibility and ease of introducing new services and deployments
6. Stability and roadmap planning
7. Reference customer/site volume in deployment
8. Competitiveness of offering and commercial terms

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Observations

Managed SD-WAN is a high growth segment in the U.S., followed by co-managed SD-WAN. A significant growth in integrating ever more complex security solutions (often from leading partners) has been observed this year, with many providers now marketing SD-WAN plus solutions, which in many ways come close to full SASE implementations.

From the 92 companies assessed for this study, 28 have qualified for this quadrant with nine being Leaders.

AT&T

AT&T offers modular enterprise tools and integration architecture and solutions such as AT&T FlexWareSM, AT&T Network on Demand and AT&T Managed Network Services that cover the entire range of managed SD-WAN.

COMCAST BUSINESS

Comcast Business offers managed SD-WAN, co-managed SD-WAN, managed SD-WAN OTT and multicloud connectivity, with security options — including proactive threat intelligence and hunting — covering both cloud and endpoint.

GTT

GTT offers a wide range of options within its managed SD-WAN portfolio. The company leverages its global, tier-1 IP backbone to transport client traffic between locations. Its SD-WAN continuously optimizes a client's network using AI capabilities to route traffic over the best available WAN circuit.

LUMEN

Lumen is accelerating its expansion in the managed SD-WAN market and is also focusing on the growing SASE marketplace. It has a formidable partnership ecosystem and delivers an extensive range of customized and industry-specific solutions.

NTT

NTT provides SD-WAN via its software-defined infrastructure (SDI) initiative, which is based on its managed network overlay services (MNOS) platforms, and the Cisco infrastructure with API management to enable easy multi-platform and vendor integration.

orange

Orange Business Services' flexible SD-WAN offering is an automated, intelligent, global solution with on-demand virtualized services. It is centrally orchestrated for end-to-end performance and control. The solution can also be customized based on clients' requirements for a fully managed or co-managed service delivery.

T-Mobile

T-Mobile adopts an access-agnostic approach. Its sales and design/implementation process are highly advisory led. It works closely with clients to deliver customer-specific implementations and employs industry experts. T-Mobile's managed SD-WAN solution (MNS Complete) is delivered either as a fully managed solution or for customer co-management.

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verizon

Verizon has built a large solution set of SD-WAN managed and co-managed services, using its own, extensive partner ecosystem of solutions and its own accelerators and tools, allowing secure connectivity over multiple network types. It is well positioned to grow continuously.

wipro

Wipro's managed SD-WAN services are part of its global Digital Network Services. The company ensures consulting-led delivery of both off-the-shelf and highly tailored specific solutions. It has a comprehensive portfolio, offering a wide range of advanced solution and service sets, tools and processes for its clients.

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Leader

"Comcast Business provides secure managed SD-WAN, with SLAs tailored to clients as required."

Dr. Kenn D Walters

Comcast Business

Overview

Comcast Business' managed SD-WAN solutions are offered either as a fully managed (from its network operation centers) option or co-managed by the customer and powered by Cisco Meraki, Cisco SD-WAN, Versa or Fortinet secure device gateways, with in-built secure routing and next-gen firewalls. The company provides customers with options to connect to their high-performance global backbone, which can be either provisioned and managed by Comcast Business or procured by a customer.

Strengths

SD-WAN orchestration integrated within solution: The SD-WAN orchestrator views and manages all SD-WAN deployments from Comcast Business' customer portal, enabling simple configuration of firewall policies, app control filters and firmware updates. It centralizes global management for networking and security across all SD-WAN deployment areas.

AI built into the fabric of SD-WAN operations and control: The company's customer portal has in-built AIOps for AI-enhanced network and application optimization; end-to-end visibility of app performance from cloud to edge; shadow IT discovery scanning; detailed WAN edge analytics, per-user; and full-service capabilities from the cloud.

Multiple delivery options for secure SD-WAN in near SASE constellations: The options include managed SD-WAN, co-managed SD-WAN, managed SD-WAN OTT and multicloud connectivity, with security options covering both cloud and endpoint. All are provided with a 24-by-7 managed detection and response, including security analytics and security incident resolution and reporting.

Caution

Since Comcast Business acquired Masergy (formalized in October 2021), it may require additional PR and marketing initiatives to increase awareness of its capabilities among enterprises. Published reference cases and media exposure of its attractive and expanded offerings would help it to stay ahead of its competitors. The usual friction points of merging the offerings and organizations must also be resolved in 2022.

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Appendix

Methodology & Team

The ISG Provider Lens 2022 – Network — Software Defined Solutions and Services 2022 analyzes the relevant software vendors/service providers in the US 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 2022, 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 Life 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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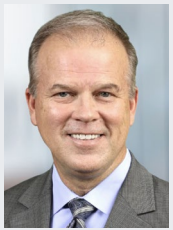
Lead Author

Dr. Kenn D Walters
Distinguished Lead Analyst

Dr. Kenn Walters is a highly skilled senior executive with over 40 years of experience in directing and managing major transformational technology projects, research and development programs, as well as extensive experience within providers and in global industry research and management consultancy. For ISG, Kenn has written over 100 articles as a distinguished lead analyst for ISG Insights in areas such as digital transformation, cloud managed networks, SD networking, SDN and digital disruptors. He and is a Distinguished lead analyst and author for multiple regions in the Provider Lens™ reports, (https://isg-one.com/research/isg-provider-lens) in such areas as Networks – Software Defined Networking, Digital Business Software and Services, Contact Center as a service and CC CX. He holds bachelor's, master's and doctorate degrees in computer science and communications systems.

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.

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ISG Provider Lens™

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

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

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