

# Networks – Software Defined Solutions and Services

A research report comparing service provider strengths,  
challenges and competitive differentiators

Customized report courtesy of:



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Report Author: Craig Baty

### **Borders between SDx and cloud are blurring**

This ISG Provider Lens™ study examines a range of network offerings related to software-defined networking (SDN) in Australia. These include managed SD-WAN and associated core and mobility service offerings, SDN transformation services, and the fast-emerging areas of secure access service edge (SASE) and Edge technologies.

This study provides an overview of the segments and serves as comprehensive decision-making support for user organisations, enabling them to evaluate the offerings and performance of providers of SDN services in Australia.

Networks and SDN services encompass a range of business areas, processes and methods. They are also closely tied to the overall digital business transformation trends among enterprises in Australia and worldwide.

The borders between WAN, LAN, wireless local-area network (WLAN) and cloud connectivity are beginning to blur. In Australia, over the next 5-10 years, software-defined technology and orchestration will enable end-to-end workflow monitoring and ensure segmentation continuity from the edge to the applications. Enterprises of the future will need to be hyper-connected, data-driven, multicloud enabled and end-to-end secured. This creates massive opportunities for a range of Australian telcos and managed service providers (MSPs), including global MSPs with a presence in Australia.

# Traditional networking is shifting to SDN.



Over the next five years, edge networking, multicloud network architectures, network services verticalization, SASE, AI-assisted network automation platforms, network as a service (NaaS), and 5G/WiFi6 convergence are predicted to cut across technology domains to provide an integrated network ecosystem to support the next-generation enterprise.

Enterprises in Australia want to increase their agility, flexibility, competitiveness, delivery structures, and remote working and continuity practices, particularly in response to the COVID-19 pandemic. The significant challenge is not just in terms of technology, but the transformation of established processes and traditional management practices.

Traditional networking is shifting to SDN. The SDN strategy of MSPs that provide more services over an increasingly distributed workforce will continue into

2023. Concurrently, many providers in Australia want to broaden their portfolio of services to support their remote workforce.

Over the last few years, providers have observed a spike in security requirements from enterprises, and this trend is expected to continue. At the same time, enterprises are demanding more flexibility, speed and collaboration, both internally and outside organization boundaries, to support their increasingly mobile customers and users at the edge of the business and the traditional network. Over the next 2-5 years, edge solutions and virtualisation will foster the consolidation of services for MSPs.

CEOs and CTOs of Australian enterprises need to develop an understanding that SDN works hand in hand with cloudification, intelligent edge and mobility strategies. This also extends to

digital business transformation areas such as AI, IoT, automation and collaboration.

Some of the trends observed in this space across Australia are detailed here:

### **Accelerated adoption of SDN technologies and increased opportunities for SDN suppliers**

The enterprise networking landscape and demand for network automation and SD-WAN services have significantly changed, with the restrictions enforced by the COVID-19 pandemic and increased adoption of the work-from-home (WFH) model. Enterprises are looking for SDx solutions, integrated with BCP and DX as well as providing for disaster recovery, eliminating vendor lock-ins and achieving a robust security posture, along with reduced implementation timelines. They see network services as a potential lever to build business resilience, reduce CapEx, and achieve agility and scalability.

The pandemic has triggered a shift to more distributed networks including an acceleration in cloud migration. The market witnessed a significant uptake in the use of collaborative tools, particularly unified communications and video conferencing solutions, to support the new remote work model. Also, with the movement of applications from on-premises data centres to cloud-hosted environments, providers see more opportunities to optimise SD-WAN solutions for SaaS and IaaS environments, including fully virtual environments at remote or branch office locations.

These drastic changes have led to an upscaling of network capacity by customers. At the same time, they face pressure to re-evaluate network configurations, security and transformation options. Many enterprises continue to support work-from-home employees and have implemented a



hybrid model that combines in-office/branch with remote work. This will further drive SD-WAN usage and continue to shape the evolution of the SDN market in the future.

### **Innovative technologies and solutions**

Digital business transformation and innovations require flexibility in SDN for driving solutions to their full potential. Service providers have been addressing this need by offering intent-based networks, AI/machine learning-driven solutions, rapid hotspot provisioning, and intelligent edge computing. The increased adoption of such innovative technologies have been driving significant changes in network operations over the past five years.

Many telecommunication service and network service providers as well systems integrators offer SD-WAN and other SDN

solutions, ranging from partial solutions to complete end-to-end offerings. Some have introduced 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 mobile wireless LAN (SD-WMLAN). This market is further driven by the transition of many enterprises to the cloud or multicloud environments that are well supported by SDN, from the enterprise core to edge. Further change is apparent in the early stages of implementation around SASE.

**Enterprises are looking for SDx solutions, integrated with BCP and DX.**



## Provider Positioning

Page 1 of 4

|                  | 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        | Product Challenger  | Product Challenger                                   | Product Challenger             | Not In                            |
| Aryaka           | Product Challenger        | Product Challenger  | Not In   | Not In                         | Leader                            |
| Aussie Broadband | Product Challenger        | Product Challenger  | Not In   | Product Challenger             | Not In                            |
| BT               | Product Challenger        | Not In  | Not In   | Not In                         | Not In                            |
| Cato Networks    | Not In                    | Product Challenger  | Leader   | Product Challenger             | Contender                         |
| Cisco            | Not In                    | Market Challenger   | Leader   | Leader                         | Leader                            |
| Citrix           | Contender                 | Product Challenger  | Product Challenger                                   | Product Challenger             | Leader                            |
| Coevolve         | Product Challenger        | Not In  | Not In   | Not In                         | Not In                            |
| CTM              | Not In                    | Not In  | Not In   | Contender                      | Contender                         |
| Data#3           | Contender                 | Contender   | Leader   | Contender                      | Contender                         |



## 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) |
|------------------|---------------------------|---|--|--------------------------------|-----------------------------------|
| Datacom          | Leader                    | Leader  | Rising Star ★  | Product Challenger             | Not In                            |
| Dicker Data      | Not In                    | Not In  | Leader   | Not In                         | Not In                            |
| Empired          | Contender                 | Contender   | Not In   | Rising Star ★                  | Contender                         |
| Ericsson         | Not In                    | Not In  | Product Challenger                                   | Not In                         | Not In                            |
| HCL              | Product Challenger        | Rising Star ★   | Product Challenger                                   | Product Challenger             | Product Challenger                |
| HPE Aruba        | Not In                    | Not In  | Leader   | Leader                         | Not In                            |
| IBM              | Product Challenger        | Not In  | Not In   | Product Challenger             | Not In                            |
| Infosys          | Leader                    | Leader  | Leader   | Leader                         | Leader                            |
| Juniper Networks | Not In                    | Not In  | Leader   | Contender                      | Product Challenger                |
| Logicalis        | Product Challenger        | Product Challenger  | Contender  | Not In                         | Not In                            |



## 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) |
|--------------------------|---------------------------|---|--|--------------------------------|-----------------------------------|
| Lumen                    | Rising Star ★             | Product Challenger  | Product Challenger                                   | Contender                      | Product Challenger                |
| Macquarie Telecom        | Leader                    | Product Challenger  | Not In   | Product Challenger             | Product Challenger                |
| Megaport                 | Not In                    | Not In  | Contender  | Contender                      | Not In                            |
| Microland                | Contender                 | Not In  | Product Challenger                                   | Not In                         | Not In                            |
| Nexion                   | Contender                 | Contender   | Not In   | Not In                         | Not In                            |
| NTT                      | Leader                    | Leader  | Contender  | Market Challenger              | Leader                            |
| Nuage Networks           | Product Challenger        | Not In  | Contender  | Leader                         | Rising Star ★                     |
| Open Systems             | Contender                 | Contender   | Not In   | Not In                         | Not In                            |
| Optus                    | Product Challenger        | Product Challenger  | Product Challenger                                   | Contender                      | Product Challenger                |
| Orange Business Services | Leader                    | Leader  | Leader   | Leader                         | Leader                            |





## Provider Positioning

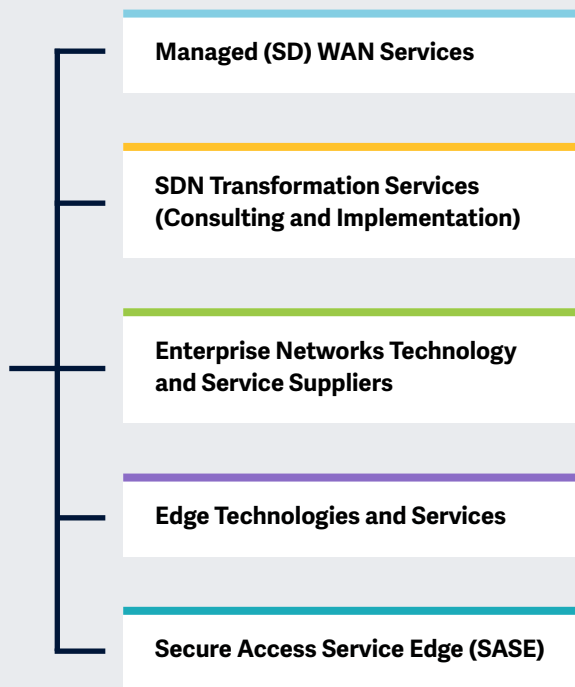
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|                     | Managed (SD) WAN Services | SDN Transformation Services (Consulting and Implementation) | Enterprise Networks Technology and Service Suppliers | Edge Technologies and Services | Secure Access Service Edge (SASE) |
|---------------------|---------------------------|---|--|--------------------------------|-----------------------------------|
| Talari Networks     | Not In                    | Not In  | Contender  | Not In                         | Not In                            |
| Tata Communications | Leader                    | Not In  | Not In   | Not In                         | Leader                            |
| TCS                 | Product Challenger        | Product Challenger  | Product Challenger                                   | Contender                      | Product Challenger                |
| Tech Mahindra       | Leader                    | Leader  | Product Challenger                                   | Leader                         | Product Challenger                |
| Telstra             | Leader                    | Leader  | Leader   | Leader                         | Product Challenger                |
| Verizon             | Leader                    | Leader  | Product Challenger                                   | Leader                         | Rising Star ★                     |
| Versa               | Contender                 | Contender   | Product Challenger                                   | Not In                         | Leader                            |
| VMware              | Not In                    | Not In  | Leader   | Not In                         | Not In                            |
| Vodafone            | Product Challenger        | Market Challenger   | Market Challenger                                    | Product Challenger             | Contender                         |
| Wipro               | Leader                    | Leader  | Leader   | Leader                         | Leader                            |



# This study focuses on the critical aspects of SDx in Australia

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 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.



### Scope of the Report

In this ISG Provider Lens™ quadrant study, ISG includes the following five quadrants covering:

- Managed SD-WAN Services
- SDN Transformation Services (Consulting & implementation)
- Enterprise Networks Technology and Service Providers
- Edge Technologies and Services
- Secure Access Service Edge (SASE)

This ISG Provider Lens™ study offers IT-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 services 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 \$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.

**For the purposes of the Australian market**, we have not split the report into these two market segments.

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 where the market is complex).





### 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.

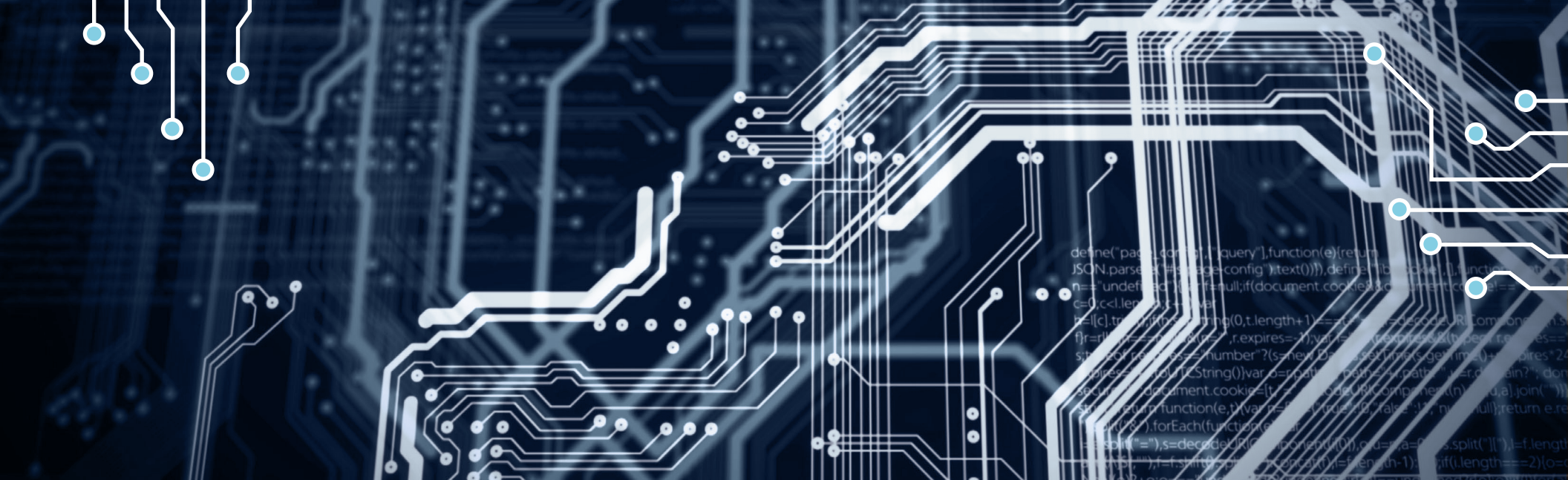
**Leaders** have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative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

### Who Should Read This

This report is relevant to enterprises of all sizes across industries in Australia for evaluating managed SD-WAN service providers.

In this quadrant, ISG highlights the current market positioning of SD-WAN service providers in Australia and how they address key enterprise challenges in the region.

To cater to a more distributed workforce, the shift from business applications from on-premises data centers to cloud-hosted environments continues to rise. As WAN, LAN, WLAN and cloud connectivity capabilities become more intertwined, enterprises outsource their managed WAN services to service providers or

telcos to reap the benefits of centralized control, scalability and security. In addition, providers have been offering complete managed SD-WAN solutions, including hybrid MPLS/IP or MPLS/SDN solutions, as white-label services. As a result, enterprises can have broader strategic implementation offerings.



**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 and partnerships of service providers differ from the rest in the market.



**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 providers of managed SD-WAN transformation services delivery.

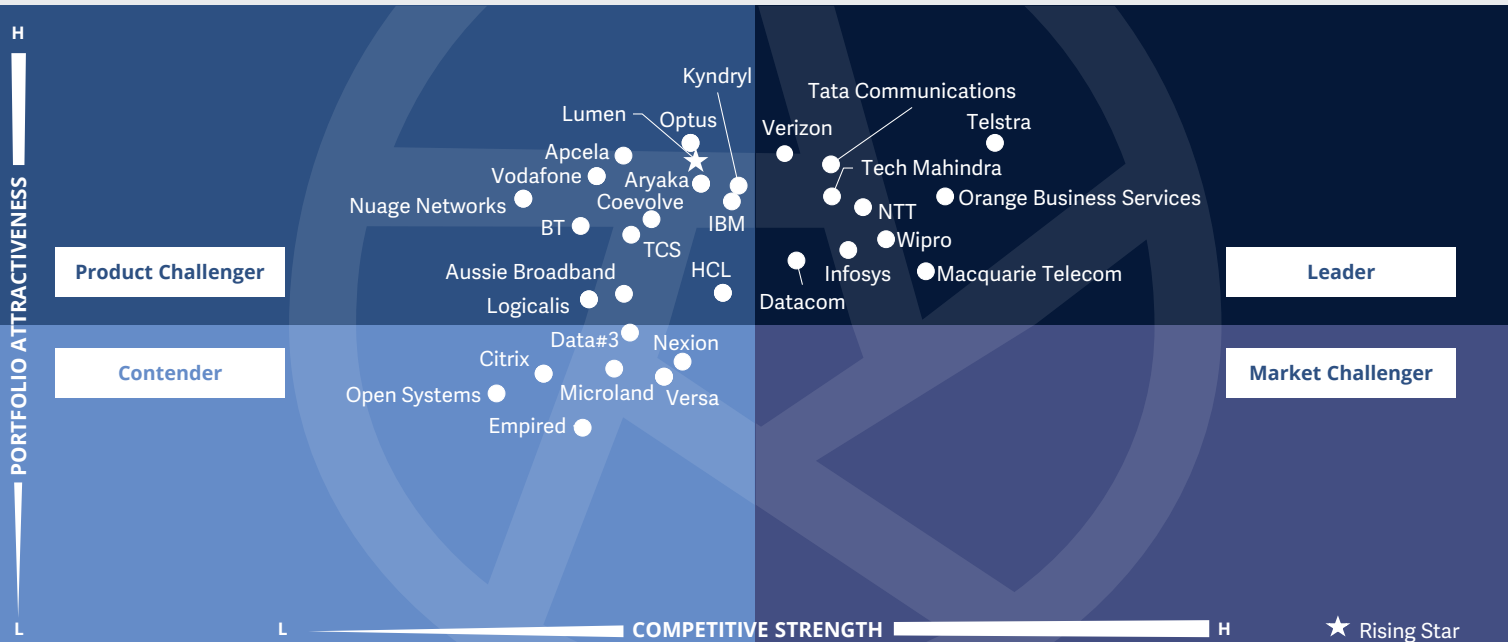


**Procurement professionals** should read this report to learn more about managed SD-WAN service suppliers, as payment schemes for such services are often based on SLAs and KPIs being met or levels of service and quality of service. Some providers also offer pay-as-you consume or similar payment arrangements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



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

Australia 2022



This quadrant assesses providers that **deliver managed SD-WAN** solutions and associated services to enterprise clients. Suppliers have been **increasingly active as MSPs**, offering complete managed SD-WAN solutions to enterprises.

Craig Baty





## Managed (SD) WAN Services

### 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, centralising and simplifying network management. This overlay design abstracts software from hardware, enabling network virtualisation 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 centralised management. The key aspect of an SD-WAN architecture is that it can communicate with all network endpoints without the need for external mechanisms or additional protocols.

Suppliers have been increasingly active as managed service providers, offering complete managed SD-WAN solutions to enterprises (including hybrid MPLS/IP or MPLS/SDN solutions) 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



## Managed (SD) WAN Services

### Observations

Service providers in Australia have been increasingly active in offering managed services as complete managed SD-WAN including hybrid MPLS/IP or MPLS/SDN solutions. These are provided as white-label services that telco providers or integrators can offer to clients as a part of broader strategic implementations.

From the 97 companies assessed for this study, 30 have qualified for this quadrant with 10 being Leaders and 1 as a Rising Star.

### Datacom

**Datacom** is Australia and New Zealand's largest locally grown professional IT services company and has 30 offices across APAC, the U.S. and the U.K. It has a competitive SD-WAN offering and a strong Cisco accreditation for SD-WAN services in Australia.



Infosys provides business consulting, IT and outsourcing services to more than 1,500 customers. It has a highly differentiated SD-WAN offering and a broad partner ecosystem in Australia.

### Macquarie Telecom Group

**Macquarie Telecom Group** is an Australia-based ICT provider that caters to both the enterprise and government sectors. The company is a significant VMware partner in APAC for its SD-WAN solution.

### NTT

**NTT** is a subsidiary of Japan-based NTT Communications and provides network, infrastructure, security, cloud and managed solutions. It offers Australian clients a highly comprehensive SD-WAN platform and advanced SDN functionality.



**Orange Business Services** is a global ICT services provider with 25,000 employees worldwide and a presence in more than 160 countries. It supports Australian businesses on their data journey, starting from SD-WAN, IoT and cloud to AI app development and cybersecurity.



**Tata Communications** is an India-based global managed network transformation provider that has been present in Australia for many decades. Its SD-WAN offering has advanced functionalities and comprehensive managed security service options.



**Tech Mahindra** is a leading provider of digital transformation, consulting and business reengineering services across 90 countries. It offers a highly competitive managed SD-WAN solution to Australian clients.



**Telstra** is Australia's largest telecommunications provider, with a growing presence within APAC. It has a broad range of managed SD-WAN services, targeting a range of market segments.



## Managed (SD) WAN Services

### verizon<sup>✓</sup>

**Verizon** is a global networking and telecommunications company, with more than 30 years of experience in delivering managed network services. It has over 300 employees in Australia. Verizon delivers a transport-agnostic managed SD-WAN solution to provide both flexibility and options to customers.



**Wipro** is a global provider of IT, consulting and business process services. Headquartered in India, the company has a growing presence in Australia. Wipro continues to make significant investments in SD-WAN innovation initiatives and services.

### LUMEN<sup>®</sup>

**Lumen** (Rising Star) is a telco and networking company with a highly comprehensive managed SD-WAN services offering and a fast-growing presence in Australia and Asia.



# Wipro



“Wipro continues to make significant investments in SD-WAN innovations and services.”

*Craig Baty*

## Overview

Wipro is a leading global provider of IT, consulting and business process services and is headquartered in India. It has a presence in 67 countries and over 1,300 customers globally. The company has over 231,000 employees, spanning 6 continents, and a growing presence in Australia with offices in Sydney, Melbourne, Brisbane and Canberra. Wipro provides end-to-end managed services for SD-WAN within its MNS2.0 framework.

## Strengths

**Comprehensive SD-WAN core offering:** Wipro provides end-to-end managed services for WAN and SD-WAN within its MNS2.0 framework. Its core SD-WAN offering, #WANFreedom, takes a vendor neutral approach that provides clients with options for SD-WAN technologies, types of links and ISPs.

**Significant investments in SD-WAN innovation initiatives:** Wipro has made significant investments in its CoE for testing various SD-WAN solutions and use cases and creating a score card to recommend the best SD-WAN solution to respective clients. It also

assists customers with pilots for solution evolutions and business case development.

**Highly competitive SD-WAN service:** Wipro’s Multi-Domain Orchestrator (MDO) is a single dashboard that orchestrates application performance across multiple network domains and interconnects the network domain, SD-WAN, data centres, SDN and cloud. It utilises a multi-dimensional go-to-market strategy that involves upselling to the existing customer base via direct selling and OEM partners.

## Caution

Wipro is well known for its comprehensive system integrator and consulting offerings in the IT market and less so in networking. Potential purchasers in Australia should identify the exact aspects that will add value to their networking requirements.





# SDN Transformation Services (Consulting and Implementation)

## SDN Transformation Services (Consulting and Implementation)

### Who Should Read This

This report is relevant to enterprises across all industries in Australia for evaluating service providers of SDN transformation services that involve consulting and implementation.

The report highlights the network services and solutions proficiency of selected providers that can handle network transformation, from consulting to implementation.

To stay highly competitive in the SDN transformation service sector, consulting companies, large hardware vendors and managed network service providers have been actively involved in offering a broad spectrum of SD-WAN solution packages, independently or as a part of partnership deals.

Although DIY SDN deployments or co-managed deployments are done, enterprises are seen increasingly engaging with licensed telcos or service providers for a seamless network transforming process.

Mature transformation service providers are leveraging successful use cases (with proven integrated designs, predefined processes and technology) and offering industry-specific solutions.



**IT and network management leaders** should read this report to understand the relative positioning and capabilities of providers that can help them effectively adopt SDN transformation services. The report also shows how the technical and integration capabilities and partnerships of service providers differ from the rest in the market.



**Digital transformation professionals** should read this report to understand how providers of SDN transformation 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 providers of consulting and other SDN transformation services delivery.

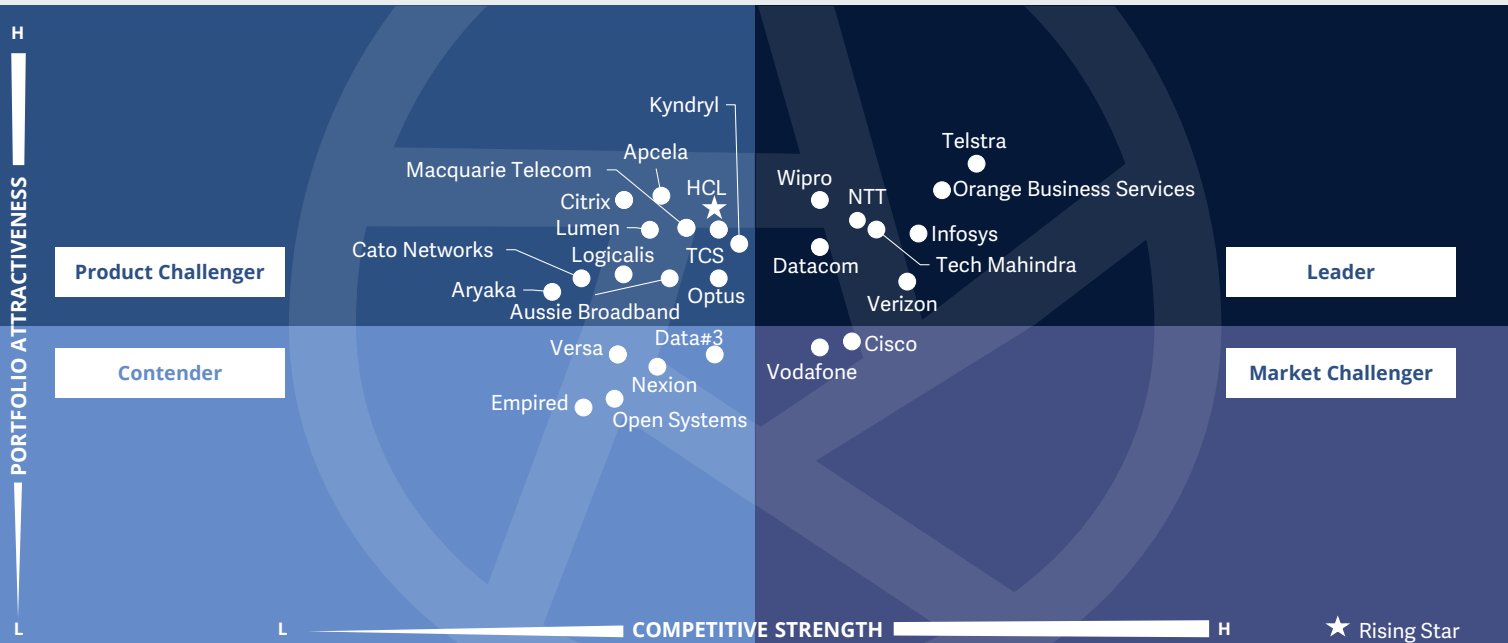


**Procurement professionals** should read this report to learn more about managed SDN transformation services suppliers, as payment schemes for such services are often based on SLAs and KPIs being met and or levels of service and quality of service. Some providers also offer pay-as-you consume or similar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



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

Australia 2022



This quadrant analyses **providers of advisory or consulting services** associated with the delivery of SDN and SD-WAN to enterprises, ranging from initial advisor consulting through to services delivery and rollout.

Craig Baty



## SDN Transformation Services (Consulting and Implementation)

### Definition

Traditionally, modifications or new installations of IT devices in a data center and its external WAN networks involved making changes to each network component, which is time consuming. This rigid architecture is increasingly being challenged by current business requirements for more agility, flexibility, automation and security. Advanced technologies such as private, public, hybrid and multicloud networking, mobile application usage in the workplace, IoT, Industry 4.0, big data, infrastructure as a service (IaaS), and intent-based AI and machine learning networking solutions require 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

virtualization (NFV), cloudification strategies and digital transformation undertakings. By moving the control layer to the cloud and, therefore, centralizing and simplifying network management using its overlay architecture, SD-WAN is easier to manage than legacy WANs and can address today's digital transformation-driven business needs more effectively.

Suppliers in this area have been increasingly active as advisors or consultants for implementation, supplying complete or partial solutions to enterprises. They may also act as brokers and project managers to ensure combined coalition deliveries as planned. Consulting companies, large vendors and managed network services providers have also been actively involved in offering SD-WAN packages in this area, independently or as a part of partnerships or consortium deals.

### Eligibility Criteria

1. Scope of product/service portfolio
2. Ability to deliver consulting for strategizing right through to deploying technology, including providing support in all integration and implementation areas
3. Understanding of 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. Stability and roadmap planning capabilities
6. Reference customer or solutions post pilot or commercial deployment
7. Competitiveness of offering and types of commercial terms





## SDN Transformation Services (Consulting and Implementation)

### Observations

In Australia, traditional IT rigid architecture and installations are being challenged by current business requirements for more agility, flexibility, automation and security.

Suppliers in the SDN transformation space in Australia have been increasingly active as advisors/consultants for implementation, supplying complete or partial solutions to enterprises. Consulting companies, large vendors and managed network services providers have also been actively involved in offering SD-WAN packages in this area, independently or as a part of partnership/consortium deals.

From the 97 companies assessed for this study, 26 have qualified for this quadrant with 8 being Leaders and 1 as a Rising Star.

### Datacom

**Datacom** is Australia and New Zealand's largest professional IT services company and has 30 offices across APAC, the U.S. and the U.K. It has a highly accredited SDN transformation service, backed by expertise across a broad spectrum of IT services.

### Infosys

**Infosys** provides business consulting, IT and outsourcing services to more than 1,500 customers. It has a highly developed SDN transformation service and deep experience in SD-WAN delivery.

### NTT

**NTT** is a subsidiary of Japan-based NTT Communications and provides network, infrastructure, security, cloud and managed solutions. In Australia, it offers

comprehensive SDN transformation services and highly secure network delivery.



**Orange Business Services** is a global ICT services provider with 25,000 employees worldwide and a presence in more than 160 countries. It provides SDN transformation services to Australian enterprises in the natural resources, construction, engineering and industrial sectors.

### Tech Mahindra

**Tech Mahindra** is a leading provider of digital transformation, consulting and business reengineering services across 90 countries. It has a strong ecosystem of alliances and partnerships in the SDN transformation segment.



**Telstra** is Australia's largest telecommunications provider, with a growing presence across APAC. Its recent acquisition of Epicon supports IT service management (ITSM) integration and SDN transformation services, delivered in conjunction with the Telstra Purple division.

### verizon

**Verizon** is a global networking and telecommunications company with more than 30 years of experience in delivering managed network services. SDN transformation is a strategic part of its overall business model in Australia.



## SDN Transformation Services (Consulting and Implementation)



**Wipro** is a global provider of IT, consulting and business process services with a growing presence in Australia. It has an advanced SDN transformation solution, supported by a highly developed consulting framework.



**HCL Technologies** (Rising Star) is an Indian multinational IT services and consulting company. It has plans to double its sales and marketing investments in Australia over the next few years.



# Wipro



**"Wipro's SDN offering meets most industry specific networking requirements."**

*Craig Baty*

### Overview

Wipro is a leading global provider of IT, consulting and business process services, and is headquartered in India. It has a presence in 67 countries with more than 1,300 customers, globally. The company has more than 231,000 employees, spanning six continents and has a growing presence in Australia, with offices in Sydney, Melbourne, Brisbane and Canberra. Wipro offers an advanced SDN transformation solution that includes highly developed transformation tools.

### Strengths

#### **Advanced SDN transformation solution:**

Wipro's Enterprise SDN solution provides converged network access aligned with business policies for seamless user experience, and also cloud networking solutions to enable enterprises to leverage multicloud and hybrid deployment environment for agility and cost-optimisation.

#### **Highly developed digitalised consulting framework:**

Wipro leverages its digitalised consulting framework, Insightix™, to assess the maturity level of network estates and builds technology transformation roadmaps aligned with business ambitions.

Wipro's value-added services also provide WAN circuits by partnering with telcos on a case-to-case basis.

#### **Innovative and comprehensive SDN strategy:**

Wipro's SDN strategy encompasses industry-specific and innovative solutions, encompassing emerging technologies such as cognitive computing and AI, human machine interface, smart machines, machine vision and blockchain. Wipro is committed to developing differentiated solutions and use cases by using these technologies to assist customers in their digital transformation.

### Caution

Although Wipro has a presence in Australia, with offices in Sydney, Melbourne, Brisbane and Canberra, it lacks the local market penetration of its top five competitors in SDN transformation, and is facing tough competition in this market.





# Enterprise Networks Technology and Service Suppliers

## Enterprise Networks Technology and Service Suppliers

### Who Should Read This

This report is relevant to enterprises across all industries in Australia for evaluating suppliers of enterprise network technology and services.

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

SD-WAN has proven itself indispensable for enterprises that are already exploring or utilizing intent-based networking (AI/ machine learning-based). SD technology has enabled improvements in network agility and automation, while substantially reducing network operation cost.

With rising complexity of network architectures, enterprises are seeking simplified solution packages (encompassing all or some of the components such as SASE, cloud security, zero trust network access, SD-WAN and centralized control) with the option to transition to subscription-based arrangement. It eliminates vendor lock-in, hefty up-front costs and associated risks.



**IT and network management leaders** should read this report to understand the relative positioning and capabilities of providers that can help them effectively adopt enterprise network technology and services. The report also shows how the technical and integration capabilities and partnerships of service providers differ from the rest in the market.



**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 enterprise network technology and services.

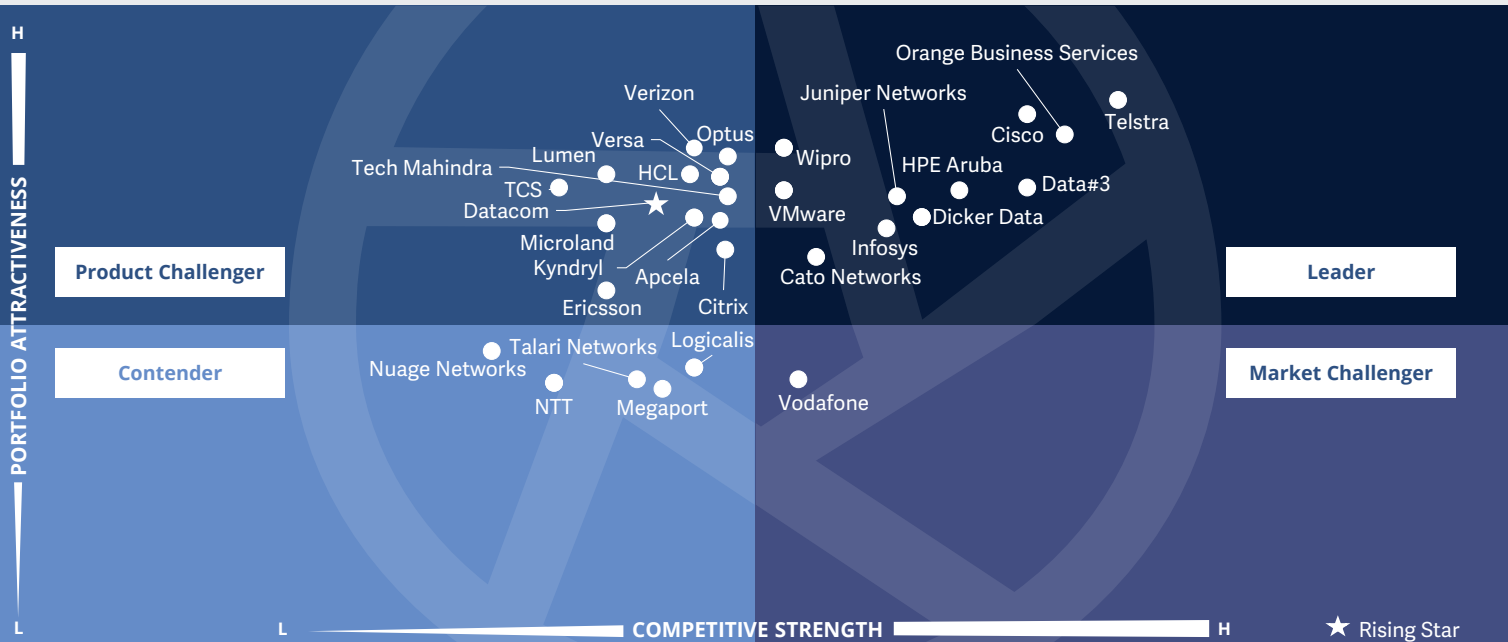


**Procurement professionals** should read this report to learn more about managed enterprise network technology and services.



**Network - Software Defined Solutions and Services  
Enterprise Networks Technology and Service Suppliers**

Australia 2022



This quadrant analyzes **providers of SDN core through to edge technology and services**, purchased directly either by enterprises or service providers for specific enterprise projects.

Craig Baty



## Enterprise Networks Technology and Service Suppliers

### Definition

SD-WAN is virtual and allows enterprises to bundle multiple WAN technologies and connections such as MPLS, broadband internet, 4G/long-term evolution (LTE) and ethernet and provision them as overall bandwidth. SD-WAN determines the path for transmitting data packets and the medium to be used; if a connection has excess load, another path is taken automatically. The virtual connections consist of multiple paths that are used simultaneously, along with core network functionality. One of the key aspects of the architecture is that it can communicate with all network endpoints without the need for external mechanisms or additional protocols, allowing ease in branch and remote set-up and management, together with secure enterprise policy-driven communications.

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

### Eligibility Criteria

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



## Enterprise Networks Technology and Service Suppliers

### Observations

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

From the 97 companies assessed for this study, 24 have qualified for this quadrant with 11 being Leaders and 1 a Rising Star.

### Cato Networks

**Cato Networks** is an enterprise networking and security company, with headquarters in Israel. It has a fast-growing presence in Australia and New Zealand, and is expanding into the

region with points of presence (POPs) in Sydney, Melbourne, and Perth and Auckland.

### Cisco

**Cisco** develops, manufactures and sells networking hardware, software, telecommunications equipment and other technology products and services. It offers an innovative SD-WAN technology solution and advanced SASE functionality.

### Data#3

**Data#3** is a leading Australian IT services and solutions provider that delivers solutions spanning cloud, modern workplace, security, data and analytics and connectivity. Data#3 offers a highly competitive SD-WAN technology offering as part of its connectivity portfolio.

### Dicker Data

**Dicker Data** has evolved to become Australia's largest value-added distributor of hardware, software, cloud and other emerging technologies. It is a leading distributor for a broad range of Australian IT resellers.

### HPE Aruba

**HPE Aruba** is a leading WAN edge company that provides WAN edge products and solutions for the enterprise SD-WAN market and across a broad range of industry verticals. It has a comprehensive edge portfolio and strong alliances with cloud security vendors.



**Infosys** provides business consulting, IT and outsourcing services to more than 1,500 customers. It provides strong technology offerings around SDN.

### Juniper Networks

**Juniper Networks** has a strong and established presence in Australia. It manufactures and markets a wide range of IT networking products that incorporate SDN technology.



**Orange Business Services** is a global ICT services provider. Its technology and service suppliers segment accounts for just under two-thirds of its overall SDN revenue in Australia.



**Telstra** is Australia's largest telecommunications provider, with a growing presence in the APAC. It has a comprehensive SD-WAN technology offering.





## Enterprise Networks Technology and Service Suppliers

### VMware

**VMware** is a virtualization and cloud computing software provider. Its flagship SD-WAN solution is VMware SD-WAN by VeloCloud, delivered via private and public cloud, hybrid cloud and on-premise options. VMware acquired VeloCloud in 2017



**Wipro** is a global provider of IT, consulting and business process services, with a growing presence in Australia. Wipro leverages a large and growing network of enterprise networks technology and services suppliers.

### Datacom

**Datacom**, Rising Star, is one of Australia and New Zealand's largest professional IT services companies and has 30 offices across the APAC, the U.S. and the UK. It has an advanced SD-WAN technology offering and a strong heritage in managed network services





“Wipro leverages its large and growing enterprise networks technology and services supplier network.”

*Craig Baty*

# Wipro

## Overview

Wipro is a leading global provider of IT, consulting and business process services. Headquartered in India, Wipro has a presence in 67 countries, with more than 1,300 customers, globally. It has over 231,000 employees spanning six continents and a growing presence in Australia, with offices in Sydney, Melbourne, Brisbane and Canberra. Wipro continues to tap into its large and growing enterprise networks technology and services supplier network.

## Strengths

**Large enterprise networks technology and services supplier network:** More than 3,000 engineers are a part of Wipro’s Telecom and 5G practice to help accelerate global connectivity through innovations in wireless, 5G, high speed data networks, enterprise networks and edge computing. Wipro has invested in co-innovation with partners to develop frameworks in edge services.

**Broad network equipment ecosystem:** Wipro works with large global network equipment suppliers to engineer its connectivity products for deployment, integration and migration. It also co-

ordinates with cloud deployment and integration, orchestration, lab support and security compliance support services.

**Comprehensive range of digital network services:** Wipro’s Digital Network Services include a comprehensive set of consulting, industrialised transformation and managed services offered in a Network-as-a-Service model. The model enables organisations to reduce time to market, optimise costs and gain greater alignment with business goals. Wipro’s SD services are enabled by the AI platforms of Wipro HOLMES.

## Caution

Wipro has maintained its position as a Leader in the Australian market, however, local suppliers of enterprise network technology and services are growing rapidly, which will increase competition in this market.





# Edge Technologies and Services

### Who Should Read This

This report is relevant to enterprises across all industries in Australia for evaluating providers delivering technologies and services in the crucial network edge space, covering hardware and software, management or reporting tools and applications, and other services associated with the network edge.

In this quadrant report, ISG highlights the current market positioning of edge technologies and services providers in Australia.

Edge technologies, services and computing continue to gain momentum. Enterprises are increasingly recognizing the need to protect their workload data as it moves through cloud platforms, the edge and data centers. Remote workforce and digital transformation (from both public and private sectors in Australia),

driven by the pandemic, resulted in a growing volume of data, where edge computing will play an important role in reducing costs, preserving bandwidth, minimizing latency and improving customer experience.

More edge-enabled applications and services are expected in the future, with the rising adoption of IoT and the roll out of a 5G national network.



**IT and network management leaders** should read this report to understand the relative positioning and capabilities of providers that can help them effectively adopt edge technologies and services. The report also shows how the technical and integration capabilities and partnerships of service providers differ from the rest in the market.



**Digital transformation professionals** should read this report to understand how providers of edge technologies and 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 edge technologies and services.

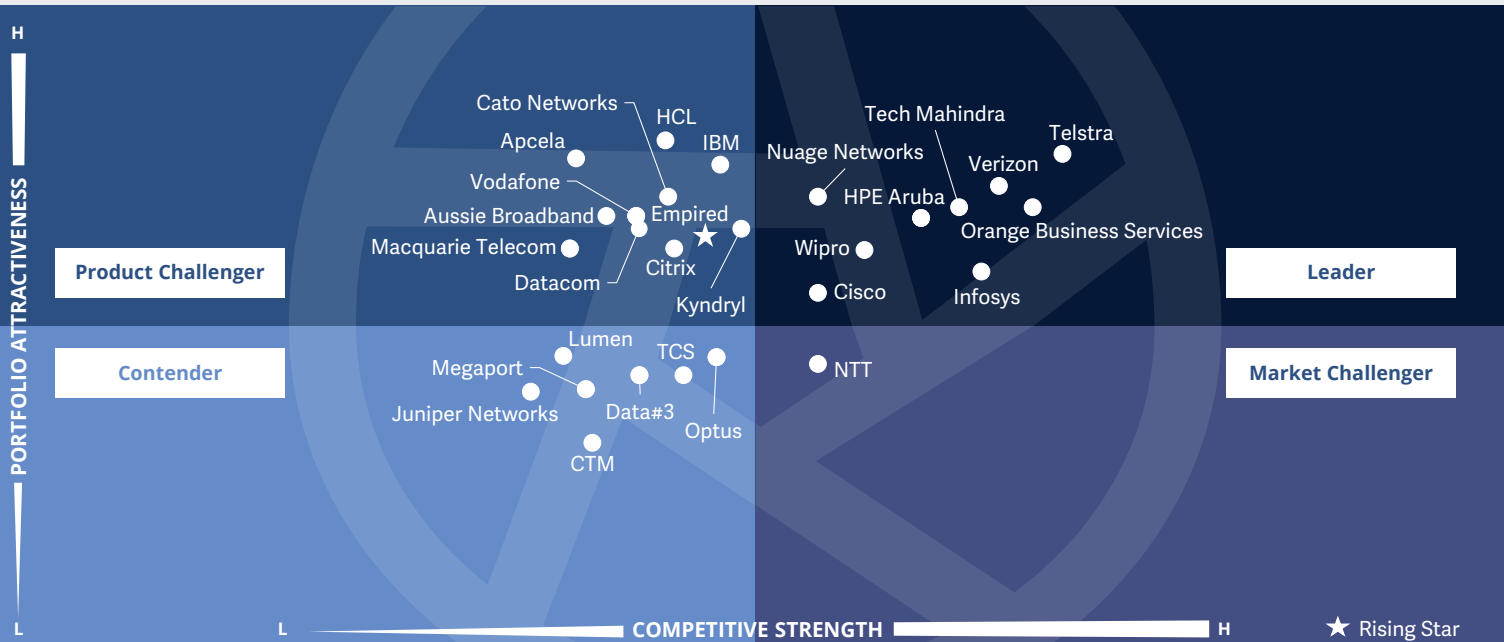


**Procurement professionals** should read this report to learn more about edge technologies and services suppliers, as payment schemes for such services are often based on SLAs and KPIs being met or levels of service and quality of service. Some providers also offer pay-as-you consume or similar payment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



**Network - Software Defined Solutions and Services**  
**Edge Technologies and Services**

Australia 2022



This quadrant assesses vendors **delivering technologies across hardware and software, management or reporting tools** and applications, and also services associated with edge network technology to enterprises across multiple verticals.

Craig Baty



### Definition

Edge technologies, services and computing are current trends in the IoT and IIoT world. With the localized processing of data, security and privacy have improved because any breach can be managed locally and not passed onto the WAN or cloud and, thus, back to central enterprise to defend. In IoT edge computing and networking, data from various connected devices of the IoT ecosystem is typically collected in a local device, analyzed on the network, and then transferred to the central data center or cloud. As the number of connected devices have increased exponentially, the volume of data generated is multifold. Thus, interim processing is required to ensure cost reduction and increased efficiency. This, in turn, places great

importance on efficient and software-driven edge capability networks and connectivity capabilities.

Edge components may be managed in the same manner as core and SD-WAN components. Software-defined capabilities include 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 both wireless (SD-WLAN) or mobile (SD-WMLAN), as well as IIoT sensors and devices or control/security devices.

### Eligibility Criteria

1. Product portfolio coverage, focus areas and completeness of modular or area solutions, together with integration into broader solutions
2. Ability to deliver requisite training and education to clients, if required, with POC or studio
3. Understanding of 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 customer or solutions in POC or pilot deployments or commercial deployments
6. Competitiveness of offerings and types of commercial terms



### Observations

Australia is still in the early days of realising the full potential of edge computing. Market demand is expected to increase dramatically in the next 12 months, with increased focus on application performance. This, in turn, will depend on the uptake of IoT solutions that include compute and data requirements. Australia-based providers of edge computing need to address key challenges in the areas of application formats, operational efficiency, resilience and security.

From the 97 companies assessed for this study, 27 have qualified for this quadrant with 9 being Leaders and 1 as a Rising Star.

### Cisco

**Cisco** develops, manufactures and sells networking hardware, software, telecommunications equipment and other technology products and services. It offers innovative edge network solutions and enhanced security network features.

### HPE Aruba

**HPE Aruba** HPE Aruba is a leading provider of WAN edge products and solutions for the enterprise SD-WAN market, encompassing a broad range of industry verticals. It has a solid client base in Australia.



**Infosys** provides business consulting, IT and outsourcing services to more than 1,500 customers. It has a comprehensive edge offering and advanced edge technology and service functionality.

### Nuage Networks

**Nuage Networks** provides a broad range of SD-WAN, SDN and SASE solutions to clients globally, and has a fast-growing presence in the Australian market. It has an advanced SD-WAN solution with a broad range of SASE and edge features



**Orange Business Services** is a global ICT services provider with a fast-evolving edge computing offering and an extensive SD-WAN strategy worldwide.



**Tech Mahindra** is a leading provider of digital transformation, consulting and business reengineering services, across 90 countries. It has an advanced edge technology and service offering and a strong edge partner ecosystem.



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



**Verizon** is a global networking and telecommunications company with more than 30 years of experience in delivering managed network services. Its 5G Edge network provides ultra-low latency connectivity for time-critical applications.



## Edge Technologies and Services



**Wipro** is a global provider of IT, consulting and business process services, with a growing presence in Australia. It has an advanced cloud edge offering and a comprehensive end-to-end edge enterprise solution.

### Empired

**Empired**, Rising Star, is an Australia-based managed service provider and a wholly owned subsidiary of Capgemini Australia. It provides highly competitive IoT- and edge-based solutions to midsize and large organisations





# Wipro



“Wipro has an advanced cloud edge offering and a comprehensive end-to-end enterprise edge solution.”

*Craig Baty*

## Overview

Wipro is a leading global provider of IT, consulting and business process services, and is headquartered in India. It has a presence in 67 countries, more than 1,300 customers globally, over 231,000 employees across six continents, and a growing presence in Australia with offices in Sydney, Melbourne, Brisbane and Canberra. Wipro has an advanced cloud edge offering and a comprehensive end-to-end enterprise edge solution that are standardized this enabling the freedom to choose OEMs.

## Strengths

**Advanced cloud edge offering:** Wipro’s Edge Cloud offering meets edge estate requirements via best-of-the-breed solutions. It utilises a hyperconverged-infrastructure-based programmable platform that supports virtual machines, container ecosystems and autonomous operations.

**Comprehensive end-to-end 5G edge enterprise solution:** Wipro offers a complete end-to-end edge solution, including design, build, deploy, test and operations. This includes providing the support of additional partners from its ecosystem, based on enterprises’ business needs and priorities. It also

leverages its own solutions and platforms in areas such as IoT, robotics, analytics and AI to support enterprises with their digital transformation initiatives.

**Innovative framework for 5G edge applications:** Wipro’s BoundaryLess Universal Edge provides a single framework to seamlessly manage and orchestrate 5G edge application services and telco workloads across core, edge and Remote office/Branch Office sites. Wipro brings in a range of accelerators with the BLUE framework, including an end-to-end cloud-based solution.

## Caution

One of Wipro’s key strengths is its broad portfolio, which is, concurrently, also difficult to understand. The area of edge technologies and services is no exception. It needs to provide some well-needed education in the market around edge.





# Secure Access Service Edge (SASE)

### Who Should Read This

This report is relevant to enterprises across all industries in Australia for evaluating service providers of enterprise SASE.

In this quadrant report, ISG highlights the current market positioning of SASE service providers in Australia how they address the key challenges faced by enterprises in the region.

Edge solutions (from niche and larger providers) in the market have enabled Australian enterprises to continue their digital transformations, moving business-critical applications to the cloud, automating factory operations, or offering its consumer mobile services. Underpinned with effective SASE architectures, enterprises can achieve ultra-low latency, increase speed, and

move network security services closer from data centres to a growing number of remote users and larger remote workforce.

As SASE is essentially a consolidation of tools and methodologies, it may create a complex and confusing vendor ecosystem for many midsize enterprises to navigate.



**IT and network management leaders** should read this report to understand the relative positioning and capabilities of providers that can help them effectively adopt SASE services. The report also shows how the technical and integration capabilities and partnerships of service providers differ from the rest in the market.



**Digital transformation professionals** should read this report to understand how providers of SASE 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 SASE services.

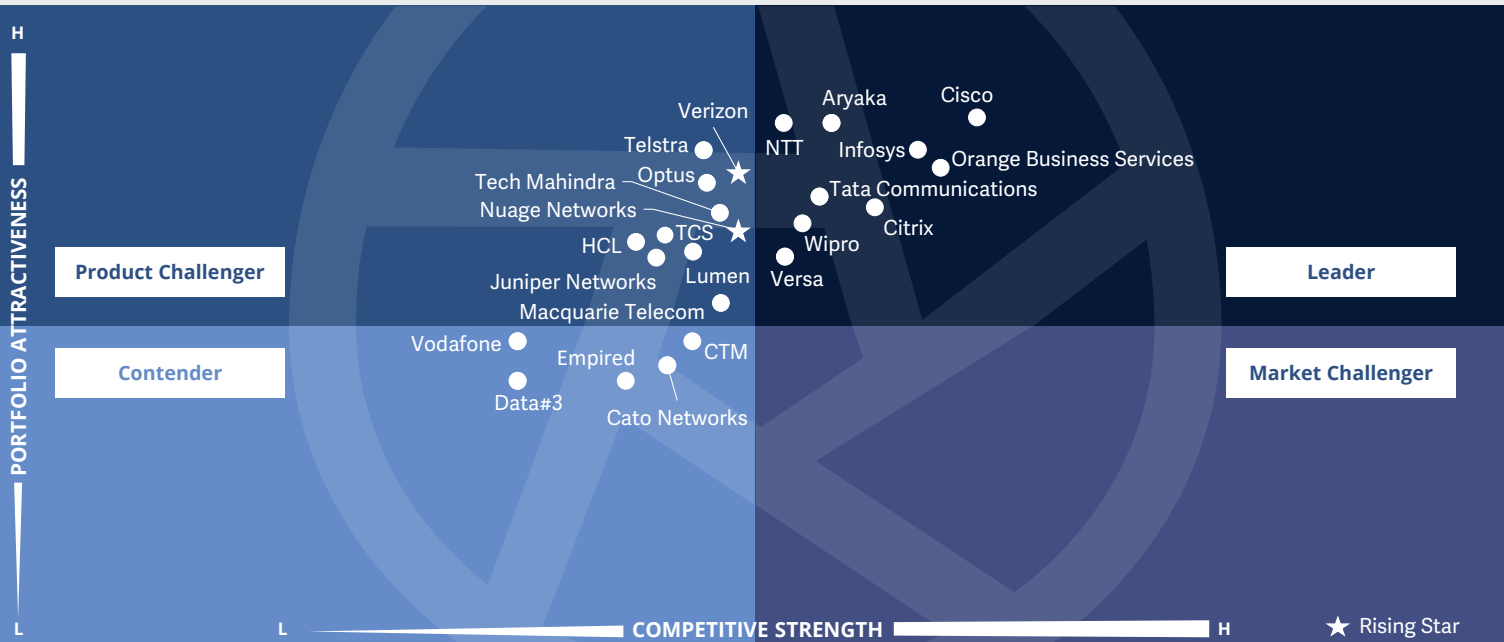


**Procurement professionals** should read this report to learn more about SASE services suppliers, as payment schemes for such services are often based on SLAs and KPIs being met or levels of service and quality of service. Some providers also offer pay-as-you consume or similar payment arrangements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



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

Australia 2022



This quadrant assesses **SASE solutions** offered to enterprises as overarching integrated networks and security solutions, **from the enterprise core to edge**, fully integrated with other enterprise business systems as needed.

Craig Baty



## Secure Access Service Edge (SASE)

### Definition

Enterprises are increasingly focused on migrating their ICT and network operations into the cloud, while enhancing security in all touchpoint areas. Software defined networks have been proven to assist with this by reducing complexity and enabling a reduced risk migration to single or multi-cloud environments for enterprises. 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. Security as a service or enhanced DIY security has been and continues to be a rapidly growing area. However, many enterprises perceive such solutions to not cover all possible touchpoints or evolve fast enough.

Considerable proposal, design and concept modeling work has been done in the area of integrated secure enterprise

networks (ISEN), which has evolved into the currently accepted term in this space. Major components of SASE include SD-WAN, cloud access security broker (CASB), next generation firewall (NGFW) and firewall-as-a-service (FWaaS), zero trust network access (ZTNA), and secure web gateways (SWG), encompassing secure and integrated access from the data center (which may encompass network function virtualization (NFV)), through 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, supplying complete PoC, pilots and solutions to enterprises. Large vendors and managed network services providers have also been actively involved in offering SASE.

### Eligibility Criteria

1. Product portfolio coverage, focus areas, completeness of solutions, fully integrated broader solutions linking to 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 the existing network and ICT solutions, instead of just rip and replace
4. Ability to deliver training and provide both POC or studio simulations and testing for a client
5. Industry-specific knowledge and experience mapped to client type
6. Scope of partnerships and offerings and management capability for the needed orchestration within a customer project
7. Reference customer or solutions in pilot moving into commercial deployment
8. Competitiveness of offerings and types of commercial terms



## Secure Access Service Edge (SASE)

### Observations

In Australia the edge of the enterprise network, is being viewed as an inflection point by organisations. Transforming the network edge can help unlock broader enterprise digital transformation objectives. Therefore, it's an important time for enterprises to rethink the edge of their enterprise network.

From the 97 companies assessed for this study, 24 have qualified for this quadrant with 9 being Leaders and 2 as Rising Star.

### Aryaka

**Aryaka** provides cloud and network security As a Service. Its Managed SD-WAN and SASE-as-a-Service combines network, security, and management capabilities and has a broad range of features for delivery in Australia

### Cisco

**Cisco** develops, manufactures and sells networking hardware, software, telecommunications equipment and other technology products and services. It has an advanced SASE strategy with highly flexible and innovative offerings for Australian clients.

### Citrix Systems

**Citrix Systems** is a global cloud computing and network management company, with a fast-growing presence in Australia. It has a broad range of differentiated SASE offerings with advanced functionalities

### Infosys

**Infosys** provides business consulting, IT and outsourcing services to more than 1,500 customers. It has a highly

differentiated SASE offering and a strong partner and alliance ecosystem to support Australian clients.

### NTT

**NTT** is a subsidiary of Japan-based NTT Communications and offers network, infrastructure, security, cloud, and managed solutions. It provides clients in Australia with a comprehensive SD-WAN offering with advanced SASE and security features.



**Orange Business Services** is a global ICT services provider with a presence in more than 160 countries. It offers Australian clients with a comprehensive range of SASE services and an innovative strategy to upgrade them.



**Tata Communications** is a global managed network transformation provider headquartered in India that has been present in Australia for many decades. Tata's offerings incorporate advanced SASE functionality and a broad partner ecosystem.

### Versa Networks

**Versa Networks** is a global networking company and has been increasingly active in the Australian market over the past few years. It has a highly differentiated and industry leading SASE offering.



## Secure Access Service Edge (SASE)



**Wipro** is a global provider of IT, consulting and business process services and has a growing presence in the Australian market. It utilises broad and comprehensive SASE functionalities and leverages advanced SASE tools.

### Nuage Networks

**Nuage Networks**, Rising Star, provides a broad range of SD-WAN, SDN and SASE solutions to clients globally, and has a fast-growing presence in the Australian market. It offers local customers a highly advanced SASE-based solution with advanced functionalities.



**Verizon**, Rising Star, is a global networking and telecommunications company, with headquarters in the US, and over 30 years of experience in delivering managed network services. Verizon's SASE offering provides deep insights on cybersecurity for Australian clients, and leverages vast intelligence sources, including forensic investigations and lab services.





“Wipro utilises a broad and comprehensive SASE functionality and leverages advanced SASE tools.”

*Craig Baty*

# Wipro

## Overview

Wipro is a leading global provider of IT, consulting and business process services, and is headquartered in India. It has a presence in 67 countries with more than 1,300 customers globally. The company has over 231,000 employees, spanning six continents and has a growing presence in Australia, with offices in Sydney, Melbourne, Brisbane and Canberra. Wipro leverages strategic and tactical alliances with SASE product vendors to provide joint solutions.

## Strengths

**Broad and comprehensive SASE functionality:** Wipro’s Secure Remote Access service includes assessment and advisory services to assist customers migrate from traditional remote access architecture to zero trust based dynamic services. Wipro provides managed services for remote access and leverages platforms to monitor, identify risks and remediate operational issues. The transformation services leverage accelerators and methodologies for migration of remote access architecture with minimal impact.

**Advanced SASE tools:** Through its Secure Internet Access offering, Wipro assesses the security of Internet access and the maturity of controls to protect organisations from web-based attacks and threats. It considers user experience to access Internet and cloud applications, while designing the architecture and security controls. Also, it provides for the transformation of technologies and deployment of new security tools as well as managing the lifecycle of infrastructure. Wipro’s Enterprise Defense Using SASE offering provides for the assessment of enterprise architecture.

## Caution

Wipro is well known as a system integrator and for its consulting offerings in the IT market and less so in networking. Differentiation in the SASE market can be achieved by focusing on its combined capabilities in the cybersecurity and SDx areas.







# Appendix

The ISG Provider Lens – Network – Software Defined Solutions and Services Australia 2022 analyzes the relevant software vendors/service providers in the Australian market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

**Lead Authors:**

Craig Baty and Phil Harpur

**Editors:**

Iphita Sengupta and Ambrosia Sabrina

**Research Analyst:**

Angelia Kho (APAC)

**Data Analysts:**

Anirban Choudhury and Hema Gunapati

**Consultant Advisors:**

Anand Balasubramanian, John Lytle, Pierre Puyraveau, Phil Hugus and Yadu Singh

**Project Manager:**

Phani K R

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



## Author & Editor Biographies



Lead Analyst

**Craig Baty**  
**Lead Analyst**

Craig has extensive research and thought leadership experience across the Asia Pacific and Japanese ICT markets. Craig is principal of DataDriven, an Asia Pacific-based research and advisory firm that is an ISG Research partner. Craig has over 30 years of executive and board-level experience in the industry, including as group vice president and head of Gartner Research Asia Pacific and Japan, CEO of Gartner Japan, global vice president of Frost & Sullivan, executive general manager for marketing and CTO of Fujitsu Australia New Zealand, general manager for marketing, strategy and alliances at

BT Syntegra, and more recently as vice president of global strategy and vice president of digital services at Fujitsu's Tokyo headquarters.

As a well-known ICT commentator and analyst, Craig has written over 200 research pieces, presented at over 1,500 events globally and is regularly quoted in regional media. Craig is actively involved in the ICT community as board member of the Australian Information Industry Association (AIIA). He is currently pursuing a doctor of business administration degree on the national culture impact on IT strategy/investment (Japan compared to Australia).



Co-Author

**Phil Harpur**  
**Principal Analyst**

Phil Harpur is an Australian-based technology analyst and consultant with over 25 years of experience across telecommunications, the cloud, data

Centres and digital media. His expertise spans over 35 countries across Asia. He also works as an analyst/writer in the financial services industry with a focus on the technology sector.

Phil is currently part of the DataDriven team, which is the Asia Pacific research partner for ISG and has contributed to the creation of nine ISG Provider Lens reports. Prior experience

includes Gartner, Frost & Sullivan and BuddeComm. He has been quoted in multiple global publications and appeared on business TV programs including Bloomberg, CNBC, Fox Business and ABC. He has also presented at numerous local and international conferences. Phil has a bachelor of science degree, with majors in computing and statistics from Macquarie University and holds a graduate certificate in applied finance and investment from the Securities Institute of Australia.



## Author & Editor Biographies

Research Analyst



**Angie Kho**  
**Regional Support Analyst**

Angie Kho is a regional support analyst at ISG and is responsible for supporting and contributing to Provider Lens™ studies on Microsoft Ecosystem for the Singapore and Malaysia markets.

Angie is part of the DataDriven team which is the Asia Pacific research partner for ISG and has contributed to seven IPLs. Her areas of expertise lie in IT services management and enterprise

planning services. Angie develops content from an enterprise perspective and authors the global summary report. Along with this, she supports the lead analysts in the research process and ad-hoc research assignments.

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.

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

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