



**HUGHES.**

**20  
25**

**CUSTOMER  
VALUE LEADER**

*Maximizing the Price/Performance ROI for Customers*

*RECOGNIZED FOR BEST PRACTICES IN THE  
NORTH AMERICAN MANAGED SD-WAN  
SERVICES INDUSTRY*

F R O S T & S U L L I V A N

## Table of Contents

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<b><i>Best Practices Criteria for World-class Performance .....</i></b>	<b><i>3</i></b>
<b>The Transformation of the Managed SD-WAN Services Industry .....</b>	<b>3</b>
Operation Efficiency.....	4
Growth Potential.....	4
Human Capital .....	5
Customer Purchase and Ownership Experience.....	5
Customer Service Experience .....	6
Brand Equity.....	6
<b><i>Conclusion .....</i></b>	<b><i>7</i></b>
<b><i>What You Need to Know about the Customer Value Leadership Recognition .....</i></b>	<b><i>8</i></b>
<b>Best Practices Recognition Analysis.....</b>	<b>8</b>
Business Impact .....	8
Customer Impact .....	8
<b><i>Best Practices Recognition Analytics Methodology.....</i></b>	<b><i>9</i></b>
<b>Inspire the World to Support True Leaders .....</b>	<b>9</b>
<b><i>About Frost &amp; Sullivan .....</i></b>	<b><i>10</i></b>
<b>The Growth Pipeline Generator™ .....</b>	<b>10</b>
<b>The Innovation Generator™ .....</b>	<b>10</b>

Best Practices Criteria for World-class Performance

Frost & Sullivan applies a rigorous analytical process to evaluate multiple nominees for each recognition category before determining the final recognition recipient. The process involves a detailed evaluation of best practices criteria across two dimensions for each nominated company. Hughes Network Systems excels in many of the criteria in the North American managed SD-WAN services space.

RECOGNITION CRITERIA	
Business Impact	Customer Impact
Financial Performance	Price/Performance Value
Customer Acquisition	Customer Purchase Experience
Operational Efficiency	Customer Ownership Experience
Growth Potential	Customer Service Experience
Human Capital	Brand Equity

The Transformation of the Managed SD-WAN Services Industry

The managed SD-WAN market is entering a pivotal phase of transformation, shaped by the convergence of networking and security, the expansion of edge computing, and the increasing demand for cloud-native agility. Adoption has reached a critical threshold, with 50 percent of enterprise clients either fully deployed or actively rolling out SD-WAN solutions. This signals a shift from early adoption to strategic integration.

Enterprises are increasingly opting for managed and co-managed models, with 92 percent of North American organizations (500+ employees) favoring these approaches to streamline operations and accelerate issue resolution. SD-WAN is evolving into a foundational component of digital infrastructure, particularly as it integrates with Secure Service Edge (SSE) frameworks to deliver automated and secure connectivity across distributed environments.

Providers are enhancing platforms with artificial intelligence and machine learning to improve threat detection, network observability, and operational efficiency. The need for seamless multi-cloud connectivity, LAN and WAN convergence, and real-time edge access is reshaping deployment priorities.

At the same time, the rise of low Earth orbit (LEO) satellite networks is expanding the frontier of connectivity, offering new opportunities to extend SD-WAN capabilities to remote and underserved regions. As LEO becomes more viable for enterprise-grade networking, it is increasingly viewed as a

strategic enabler for resilient, global digital infrastructure, especially in industries with distributed assets or mission-critical operations.

In this evolving landscape, Hughes stands out as a value leader in hybrid SD-WAN connectivity, combining terrestrial and satellite technologies to deliver flexible, scalable, and secure networking solutions that meet the demands of modern enterprise transformation.

### Operation Efficiency

Operational efficiency is a cornerstone of the value of Hughes in the managed SD-WAN market. Through its Onsite Accelerated Service Installation System (OASIS), Hughes has streamlined deployment with paperless workflows, mobile provisioning, and real-time technician tracking. Devices such as SD-WAN units, LTE modules, and SIM cards are barcoded and scanned onsite, enabling zero-touch provisioning and reducing installation time and revisits. Before-and-after photos further support day 2 troubleshooting and service validation.

Hughes also stands apart by integrating all devices and network circuits into its IT service management platform, offering clients full visibility and proactive support beyond installation. This approach contrasts with competitors who rely solely on manufacturer reporting tools.

Hughes first introduced the Active Power Edge in 2023, as a smart power distribution unit designed to enable remote reboots, whether ad hoc, scheduled, or AI-driven. Since its initial release, the solution has evolved to include statistical power usage enhancements, enhanced outlet reset capabilities, power-saving scheduling at the outlet level, and APIs for configuration, status monitoring, and firmware management. With more than 5,700 units deployed, clients have seen a 45% reduction in trouble tickets, underscoring the platform's role in improving operational efficiency and network reliability.

This completeness of vision, spanning installation, configuration, and field maintenance, reinforces the Hughes position as a value leader in secure hybrid connectivity, combining terrestrial and satellite technologies to meet the evolving demands of enterprise transformation.

### Growth Potential

Hughes continues to show growth in the managed SD-WAN and SASE markets, adding approximately

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**- Stephen Thomas,  
Sr. Industry Director**

12,000 new North American sites in 2024 and an additional 50,000 in 2025. Many enterprise clients operate networks with 350 or more locations, reflecting the ability of Hughes to scale across complex, distributed environments. Its reach spans retail, healthcare, banking, petroleum, restaurants, government, and most recently, the airline industry, where it delivers inflight connectivity using a mix of low Earth orbit (LEO) and SD-WAN technologies.

As a hardware manufacturer of electronically steerable antennas for the OneWeb (Eutelsat) LEO satellite constellation, Hughes is positioned to benefit from the expanding satellite broadband market. Its ability to manage multi-orbit satellite services further strengthens its hybrid networking capabilities. The recent acquisition of Anderson Connectivity, an aerospace company specializing in design, engineering, and manufacturing, enhances the organization's technological depth in aviation, space, and defense.

With over 800 partners, Hughes offers unmatched flexibility as a hybrid system integrator. Its Managed Private Wireless Service, a 4G/5G solution with cloud-based management and real-time monitoring, complements its SD-WAN and edge platform offerings. Together, these capabilities position Hughes as a hybrid-focused managed SD-WAN provider expanding confidently into the broader Managed SASE space.

### Human Capital

Hughes supports its expansive managed services footprint with a solid foundation in human capital. A network of field technicians across North America ensures consistent, high-quality service delivery,

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backed by OASIS, which streamlines provisioning, documentation, and technician coordination. To maintain excellence in deployment and support, Hughes operates a state-of-the-art technical training facility at its EXM building. Hughes offers structured courses for employees and customers. Field operations are further supported by three strategically located support centers in Phoenix, Arizona; Fort Lauderdale, Florida; and Monterrey, Mexico, enabling responsive service across a wide geographic footprint. Enhancing its engineering capabilities, Hughes recently acquired

Anderson Connectivity further solidifies these human capital efforts by gaining additional wisdom in aviation space and defense.

### Customer Purchase and Ownership Experience

Customer purchase and ownership experiences are central to the managed SD-WAN strategy of Hughes. The company ensures that customers not only deploy services quickly but also manage them easily throughout their lifecycle. Its customer portals provide real-time visibility, integration with enterprise IT service management suites, and performance monitoring across all deployed technologies. OASIS remains a standout, automating provisioning and streamlining multi-vendor deployments with zero-touch capabilities. By masking device complexity and integrating point solutions into a unified, easy-to-navigate portal, Hughes enables customers to focus on site health and performance rather than managing individual devices.

To reinforce quality at every touchpoint, Hughes uses CSTAR, a survey-based tool that collects feedback and ranks technician performance after each installation, ensuring continuous improvement. In 2025, Hughes advanced ownership experience further with the HughesON Pulse platform, a centralized, API-first monitoring environment. Pulse integrates with multiple enterprise systems, cloud services, and analytics tools to create a normalized graph service model that is consumed by machine learning and AI to generate high quality analytics. Delivered as Monitoring as a Service, Pulse gives IT leaders actionable intelligence, proactive alerts, and control across their digital operations using their ITSM of choice or a modern user interface.

These investments in automation, orchestration, and observability ensure customers experience faster deployments, simplified management, and proactive support throughout the lifecycle of their network, delivering true ownership value.

### Customer Service Experience

Hughes demonstrates industry-leading customer service, reflected in its impressive Net Promoter Score (NPS) of 57, a benchmark that underscores exceptional customer satisfaction and loyalty. This commitment is reinforced by a robust partner ecosystem, earning Hughes prestigious awards from Fortinet and Ericsson for collaboration and performance. Recognition from CRN Magazine as part of its Elite 150 Managed Service Providers and Tech Ascension's Best Managed Services Provider for Managed SASE further validates the dedication of Hughes to service excellence. Additionally, platforms that prioritize customer feedback, such as FeaturedCustomers, consistently rank Hughes as a leader in customer success. These achievements highlight the organization's ability to combine advanced technology, strong partnerships, and a customer-first approach to deliver superior customer experiences.

### Brand Equity

Hughes has long been recognized as a trusted consumer brand, and that reputation for quality and reliability carries over to Hughes. Founded in 1971 by seven engineers in a suburban garage, Hughes was built on a culture of innovation that continues to define the company today. With nearly 700 patents issued in the U.S. and half of its employees holding engineering or computer science degrees, Hughes exemplifies engineering excellence. This commitment to technical leadership ensures that every solution—from satellite connectivity to managed SD-WAN—is grounded in world-class design and performance.

The company's brand promise of being "large enough to succeed, small enough to care" reflects its ability to deliver at scale while maintaining a customer-first approach. This philosophy translates into high-quality products and services that meet rigorous standards. In 2025, Hughes achieved AS9100 certification, a globally recognized quality management standard for aviation, space, and defense industries, underscoring its dedication to consistency, safety, and compliance.

By focusing on engineering capabilities and deepening expertise, Hughes continues to deliver innovative, reliable solutions that customers trust.

## Conclusion

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Hughes exemplifies customer value leadership through a combination of operational excellence, innovation, and a relentless focus on customer experience. Its ability to deliver secure, hybrid connectivity at scale—supported by advanced automation, observability, and human capital investments—sets a benchmark in the managed SD-WAN and SASE markets. Strategic growth initiatives, including expansion into multi-orbit satellite services, private wireless, and edge platform, coupled with engineering depth and AS9100-certified quality standards, reinforce the reputation of Hughes for reliability and innovation. By blending innovative technology with a customer-first approach, Hughes delivers unmatched flexibility, visibility, and performance, ensuring enterprises can confidently navigate digital transformation. Hughes Network Systems earns Frost & Sullivan’s 2025 North American Customer Value Leadership Recognition due to its strong overall performance in the managed SD-WAN services industry.

## What You Need to Know about the Customer Value Leadership Recognition

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Frost & Sullivan's Customer Value Leadership Recognition is a top honor and recognizes the market participant that company offers products or services customers find superior for the overall quality, performance, and price.

### Best Practices Recognition Analysis

For the Customer Value Leadership Recognition, Frost & Sullivan analysts independently evaluated the criteria listed below.

#### Business Impact

**Financial Performance:** Strong overall business performance is achieved in terms of revenue, revenue growth, operating margin, and other key financial metrics

**Customer Acquisition:** Customer-facing processes support efficient and consistent new customer acquisition while enhancing customer retention

**Operational Efficiency:** Company staff performs assigned tasks productively, quickly, and to a high-quality standard

**Growth Potential:** Growth is fostered by a strong customer focus that strengthens the brand and reinforces customer loyalty

**Human Capital:** Leveraging innovative technology characterizes the company culture, which enhances employee morale and retention

#### Customer Impact

**Price/Performance Value:** Products or services offer the best ROI and superior value compared to similar market offerings

**Customer Purchase Experience:** Purchase experience with minimal friction and high transparency assures customers that they are buying the optimal solution to address both their needs and constraints

**Customer Ownership Excellence:** Products and solutions evolve continuously in sync with the customers' own growth journeys, engendering pride of ownership and enhanced customer experience

**Customer Service Experience:** Customer service is readily accessible and stress-free, and delivered with high quality, high availability, and fast response time

**Brand Equity:** Customers perceive the brand positively and exhibit high brand loyalty, which is regularly measured and confirmed through a high Net Promoter Score®



## Best Practices Recognition Analytics Methodology

### Inspire the World to Support True Leaders

This long-term process spans 12 months, beginning with the prioritization of the sector. It involves a rigorous approach that includes comprehensive scanning and analytics to identify key best practice trends. A dedicated team of analysts, advisors, coaches, and experts collaborates closely, ensuring thorough review and input. The goal is to maximize the company's long-term value by leveraging unique perspectives to support each Best Practice Recognition and identify meaningful transformation and impact.

		VALUE IMPACT	
STEP		WHAT	WHY
1	<b>Opportunity Universe</b>	Identify Sectors with the Greatest Impact on the Global Economy	Value to Economic Development
2	<b>Transformational Model</b>	Analyze Strategic Imperatives That Drive Transformation	Understand and Create a Winning Strategy
3	<b>Ecosystem</b>	Map Critical Value Chains	Comprehensive Community that Shapes the Sector
4	<b>Growth Generator</b>	Data Foundation That Provides Decision Support System	Spark Opportunities and Accelerate Decision-making
5	<b>Growth Opportunities</b>	Identify Opportunities Generated by Companies	Drive the Transformation of the Industry
6	<b>Frost Radar</b>	Benchmark Companies on Future Growth Potential	Identify Most Powerful Companies to Action
7	<b>Best Practices</b>	Identify Companies Achieving Best Practices in All Critical Perspectives	Inspire the World
8	<b>Companies to Action</b>	Tell Your Story to the World (BICEP*)	Ecosystem Community Supporting Future Success

\*Board of Directors, Investors, Customers, Employees, Partners

## About Frost & Sullivan

Frost & Sullivan is the Growth Pipeline Company™. We power our clients to a future shaped by growth. Our Growth Pipeline as a Service™ provides the CEO and the CEO's growth team with a continuous and rigorous platform of growth opportunities, ensuring long-term success. To achieve positive outcomes, our team leverages over 60 years of experience, coaching organizations of all types and sizes across 6 continents with our proven best practices. To power your Growth Pipeline future, visit Frost & Sullivan at <http://www.frost.com>.

## The Growth Pipeline Generator™

Frost & Sullivan's proprietary model to systematically create ongoing growth opportunities and strategies for our clients is fuelled by the Innovation Generator™.

[Learn more.](#)

### Key Impacts:

- **Growth Pipeline:** Continuous Flow of Growth Opportunities
- **Growth Strategies:** Proven Best Practices
- **Innovation Culture:** Optimized Customer Experience
- **ROI & Margin:** Implementation Excellence
- **Transformational Growth:** Industry Leadership



## The Innovation Generator™

Our 6 analytical perspectives are crucial in capturing the broadest range of innovative growth opportunities, most of which occur at the points of these perspectives.

### Analytical Perspectives:

- **Megatrend (MT)**
- **Business Model (BM)**
- **Technology (TE)**
- **Industries (IN)**
- **Customer (CU)**
- **Geographies (GE)**

