New Research: Enterprises Embrace NaaS and MNS, but Observability and Compliance Gaps Persist

Survey data reveals that enterprises are evaluating NaaS as a long-term investment on five-year TCO, despite key friction points

Arlington, Va., November 5, 2026 — GTT Communications Inc., a leading networking and security as a service provider for multinational organizations, has released a white paper, How Enterprises Approach NaaS and MNS to Build Resilient, Future-Ready Networks, with new research that explores enterprise adoption of Network as a Service (NaaS) and managed network services (MNS) amid growing multi-cloud and distributed IT complexity accelerated by AI adoption. Based on an industry survey conducted by Hanover Research, the white paper reveals that while enterprises have overwhelmingly embraced a combined NaaS and MNS approach, friction points across observability, compliance, cost and talent stand in the way of realizing the full value of their evolving network strategy.

Of the enterprises surveyed, 78% already use a combination of Network as a Service (NaaS) and managed network services (MNS). NaaS, defined in this survey as an on-demand cloud-native fabric focused on provisioning and disconnecting networking services such as SD-WAN and SASE, gives enterprises the speed and flexibility to move fast. MNS, where a service provider manages design to build to operations, delivers the reliability and assurance needed when the risk of variable cost is too high. Enterprises are increasingly running both to put each service model to work on what it does best. Sixty-one percent of respondents say five-year total cost of ownership, not short-term costs, is the primary metric they use to justify NaaS adoption to their boards, well ahead of three-year ROI (19%), EBIT impact of a CapEx-to-OpEx shift (11%) and payback period (8%). This underscores that enterprises are treating this as a long-term strategic investment.

"For most enterprises, the question is no longer whether to combine NaaS and MNS, but how to optimize the combination," said Claudio Scola, Vice President, Product Management, Connectivity and Voice Services, GTT. "These aren't decisions companies can easily reverse, and the architecture an enterprise puts in place now will shape how its network performs for years to come. That's what makes the friction points our research uncovered, including observability, compliance, cost and talent, so consequential. You must be able to see, secure and control both environments and operate them as one."

The four key friction points identified in the survey show up consistently across enterprises that run NaaS, MNS or both, with each carrying significant consequences if left unaddressed.

1. Lack of visibility is a primary barrier to NaaS adoption
Lack of observability, the ability to monitor and understand what's happening across the network in real time, is a barrier for 75% of enterprises adopting NaaS. Of these, 18% say it has stopped adoption more than once. Running a network that spans both NaaS and MNS, often built by different providers and tool sets, means an outage can originate in the NaaS layer, in the MNS services being delivered, or in the handoff between them. Without unified visibility, enterprises can struggle to determine the outage source as well as produce clear evidence for auditing purposes.

2. Rising compliance demands: Audit evidence and key ownership are now baseline requirements
Almost all the enterprises surveyed (90%) require a high or very high standard of audit evidence from their network providers. They need detailed activity records that can withstand scrutiny, and 94% consider provider-maintained immutable logs valuable or extremely valuable. In addition, 91% also want to control their own encryption keys, favoring either full ownership (45%) or a shared model where they own the keys but the provider manages them (46%). Compliance is also a notable NaaS observability challenge, with 32% of enterprises citing the inability to meet compliance requirements as a key concern.

3. Cost volatility: Enterprises will absorb greater short-term swings if realizing lower long-term costs
Consumption-based pricing makes network spend less predictable, and the research shows that enterprises have a clear limit on how much fluctuation they will absorb. Around half will tolerate budget variances between 6% and 10%, and another 39% accept between 11-15% before FinOps gets involved. However, when offered a NaaS solution with roughly 30% lower five-year TCO, the majority of respondents indicate they would accept meaningful short-term cost volatility, with 92% willing to accept up to 15% quarterly bill swings in exchange for that long-term payoff.

4. Talent shortages: A structural gap enterprises are automating and outsourcing around
The research showed 37% of enterprises name talent shortages as the single biggest external trend shaping their next network update cycle. The talent shortage has shown up as a consistent theme across multiple previous GTT-commissioned studies. Unable to hire fast enough, enterprises are investing in other ways to close the gap. For example, 37% prefer AI-driven automated remediation when network performance issues arise, enabling routine work to run without manual intervention.

The white paper, ***How Enterprises Approach NaaS and MNS to Build Resilient, Future-Ready Networks***, is available here.

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