

Enterprise Managed Network Services

A detailed study of the Enterprise Managed
Network Services market

QUADRANT REPORT | DECEMBER 2024 | U.S.

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GTT

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Managed delivery of increasingly complex enterprise network services is a critical success factor

The managed network services (MNS) industry, whereby entire or parts of enterprise networks are effectively outsourced to expert suppliers, has witnessed a significant evolution since its inception in the early 2000s. Initially focused on basic connectivity and maintenance tasks, the industry has expanded to include a comprehensive range of services that address the complexities of modern ICT infrastructures. Today, MNS encompass underlay network management, network security, cloud connectivity, software-defined networking and more. The demand for MNS is driven by the need for robust security measures such as secure access service edge (SASE) and regulatory compliance amid an increasingly complex threat landscape.

As enterprises and government organizations navigate the increasingly complex network

landscape and hybrid working environments, the role of MNS has become crucial. The ongoing advancements in digital infrastructure, driven by the need for enhanced security and compliance with stricter regulations, create a fertile ground for MNS, network as a service (NaaS) and network service providers to thrive. Adopting new technologies, including AI and generative AI (GenAI), further accelerates this evolution, introducing additional layers of complexity that demand specialized expertise and staffing, which enterprises may not be well equipped to deal with at pace.

Some key factors that drive rapid changes in enterprise networks globally and, in particular, within the U.S. in 2024 can be outlined as follows:

Enterprise network challenges and MNS solutions

Modern enterprises face numerous network challenges:

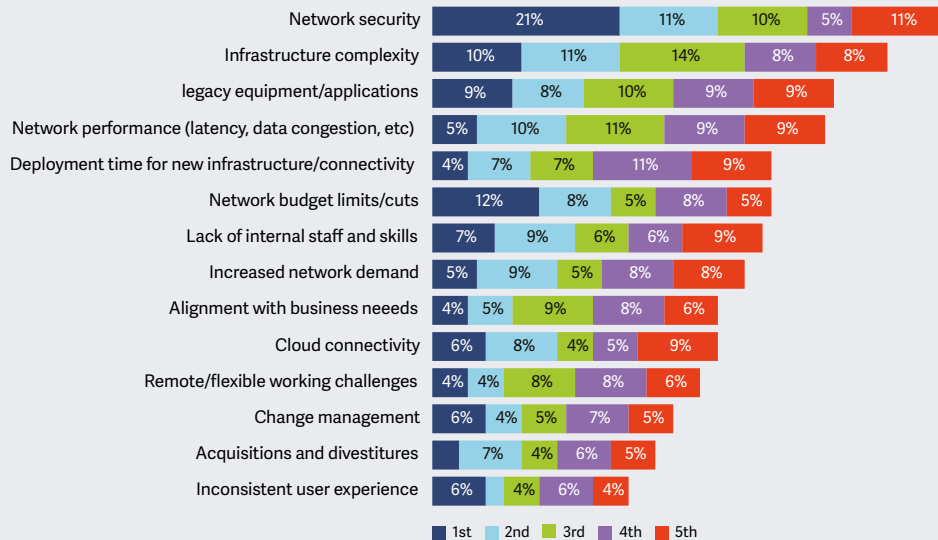
- **Heterogeneity in networks:** Integrating various network types (core, cloud and edge) and ensuring they work seamlessly in a fixed, mobile, public or private environment

MNS are **crucial**
to ensure **advanced**
enterprise
networks with
trained, efficient
staffing.



Network Management Challenges

What are the top five challenges in managing and maintaining networking for your organization?



Data gathered from 199 network decision makers in G2000 companies, mostly multinational operators based in U.S. and Europe across all industry types.

Source: ISG Market Lens reports, Network Modernization Study, October 2023

- **Performance and reliability:** Maintaining optimal performance and stability across all network domains
- **Cost management:** Balancing expenditures while achieving efficient and secure network operations
- **Regulatory compliance:** Adhering to stringent data privacy and security regulations, such as the Health Insurance Portability and Accountability Act (HIPAA), Central Consumer Protection Authority (CCPA) and GDPR
- **Technology refreshes:** Keeping up with rapid technological changes and upgrades
- **Mobility and cloud integration:** Facilitating secure and efficient cloud migration and supporting mobile workforce, considering the implementation of private 5G networks where required
- **IoT integration:** Managing IoT devices' influx and associated security risks
- **Skill set requirements:** Training existing staff and hiring new talent with expertise in advanced technologies and services required

- **Vendor management:** Co-ordinating with multiple vendors to ensure cohesive network management

MNS providers address these challenges by offering a comprehensive service suite, which can be broken into three distinct quadrants of business area focus:

1. Managed Network Services Evolution

MNS providers cover everything from network provisioning, operations and management to monitoring. Their services assure robust security through firewalls, audits, data integrity measures and sophisticated intrusion detection systems (IDS) or intrusion prevention systems (IPS). They offer both fully managed and comanaged models, which include:

- **Network provisioning, operations, management and monitoring:** Ensuring continuous network performance and security
- **Security posture maintenance:** Implementing firewalls, conducting audits, assuring data integrity and deploying IDS and IPS.



- **Network upgrades and expertise:** Providing ongoing updates and specialized support
- **Flexible engagements:** Options for the complete takeover of existing estates, potentially with an upgrade plan over time defined or targeting discrete specific network parts such as LAN, WAN, cloud and security only
- **Consulting or advisory services:** Enhancing enterprise outcomes through strategic guidance, including network upgrades, organizational change, business application integration, consolidation, etc.

2. Managed Enterprise Connectivity Solutions (DIA, VoIP and VPN)

For enterprises not fully transitioning to cloud or software-defined networks, services related to Direct Internet Access (DIA), Virtual Private Networks (VPNs), and Voice over IP (VoIP) remain critical:

- **Private and virtual networks:** Catering to diverse network needs with enhanced control and security

- **Remote access and device management:** Ensuring secure and efficient remote operations
- **System design and implementation:** Customizing networks to meet specific enterprise requirements
- **Configuration and monitoring:** Maintaining optimal network settings and performance
- **Bandwidth and user experience:** Ensuring sufficient bandwidth and a positive user experience

3. Network as a Service (NaaS)

NaaS allows businesses to leverage advanced network capabilities without the burden of maintaining infrastructure or long-term contracts:

- **On-demand connectivity:** Providing flexible, scalable network solutions
- **Pay-as-you-use model:** Charging only for the services and bandwidth consumed
- **Expert management:** Delegating daily network management to specialized providers

- **Application assurance and cybersecurity:** Ensuring secure and efficient application performance; this may also entail using security operations centers (SOCs) or cyber defense centers
- **Multicloud services:** Facilitating seamless multicloud integration, including core-to-edge coordination and operation

The managed network services industry plays a vital role in helping organizations navigate the complexities of modern ICT infrastructures. By offering a comprehensive services suite that includes network security, cloud connectivity and support for emerging technologies, MNS providers enable businesses to focus on their core operations while ensuring robust network performance and security. The continuing expansion and changes of included elements within the MNS market, driven by technological advancements and the growing sophistication of cyberthreats, underscores its importance in the digital landscape.

In this report on enterprise managed network services (2024), ISG explores the evolving market demands for enterprises in the U.S., Europe and APAC regions and presents

a comprehensive analysis of its different sectors. The report provides valuable insights helping enterprises make informed decisions regarding strategic planning, risk mitigation, and cost optimization. The report utilizes primary data from providers, as well as input from ISG advisors and other secondary and tertiary sources.

Managed network services provide advanced and business-specific network solutions that serve as a secure foundation for streamlining business transformations. By leveraging MNS, organizations can significantly reduce IT capital expenditures, minimize the need for staff scaling and training and mitigate risks associated with updates. This is especially important for companies undergoing multicloud and NaaS migrations.





Provider Positioning

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	Managed Network Services Evolution	Managed Enterprise Connectivity Solutions (DIA, VoIP and VPN)	Network as a Service (NaaS)
Accenture	Leader	Leader	Leader
Apcela	Leader	Not In	Contender
Aryaka	Market Challenger	Not In	Not In
AT&T	Leader	Leader	Leader
Birlasoft	Contender	Not In	Not In
BT	Product Challenger	Not In	Not In
Capgemini	Product Challenger	Rising Star ★	Product Challenger
Colt	Product Challenger	Leader	Rising Star ★
Comcast Business	Leader	Leader	Leader
Computacenter	Contender	Not In	Contender
Crown Castle	Not In	Contender	Not In





Provider Positioning

Page 2 of 3

	Managed Network Services Evolution	Managed Enterprise Connectivity Solutions (DIA, VoIP and VPN)	Network as a Service (NaaS)
Deutsche Telekom	Product Challenger	Product Challenger	Product Challenger
DXC Technology	Leader	Leader	Product Challenger
Extreme Networks	Not In	Product Challenger	Not In
GTT	Leader	Leader	Leader
HCLTech	Rising Star ★	Product Challenger	Leader
Infosys	Not In	Market Challenger	Product Challenger
Kyndryl	Leader	Leader	Leader
Logicalis	Not In	Product Challenger	Not In
Lumen Technologies	Product Challenger	Product Challenger	Market Challenger
MetTel	Product Challenger	Product Challenger	Product Challenger
Microland	Product Challenger	Contender	Leader





Provider Positioning

Page 3 of 3

	Managed Network Services Evolution	Managed Enterprise Connectivity Solutions (DIA, VoIP and VPN)	Network as a Service (NaaS)
Mphasis	Product Challenger	Contender	Not In
NTT DATA	Product Challenger	Product Challenger	Product Challenger
Orange Business	Leader	Leader	Leader
Red River Technology	Contender	Not In	Contender
Tata Communications	Product Challenger	Product Challenger	Product Challenger
TCS	Product Challenger	Product Challenger	Not In
Tech Mahindra	Product Challenger	Product Challenger	Product Challenger
Telefonica	Product Challenger	Product Challenger	Product Challenger
Verizon Business	Leader	Market Challenger	Leader
Wipro	Leader	Product Challenger	Leader
Zensar Technologies	Product Challenger	Not In	Product Challenger



The report is an analysis of providers offering **MNS, managed private networks and NaaS** solutions.

Simplified Illustration Source: ISG 2024

Managed Network Services Evolution

Managed Enterprise Connectivity Solutions (DIA, VoIP and VPN)

Network as a Service (NaaS)

Definition

This ISG Provider Lens™ Enterprise Managed Network Services 2024 study analyses several types of managed network service (MNS) offerings, including WANs, LANs, managed Direct Internet Access (DIA), Voice over IPs (VoIPs) and virtual private networks (VPNs), together with the provisioning of network as a service (NaaS). The report evaluates MSPs with service models that deliver MNS integrated with AI and automation — components becoming increasingly vital in managing complex networks. Experienced MSPs are using AI-based solutions and automation tools to enhance network monitoring, troubleshooting and optimization. Their offerings encompass advising, evaluating, planning, upgrading and provisioning of network services in accordance with SLAs and include a range of services such as WAN/LAN, fully managed WLAN and branch installations, managed firewalls, DIA enterprise network connections, VPNs and VoIP.

The scope of services covers areas such as onsite installations, remote operations, management and monitoring, fault diagnosis, updates and patch management, and disaster recovery. In addition, many MSPs and network operators offer advanced networks to enterprise clients in as-a-service models, NaaS, allowing an enterprise to consume what and as it needs in a highly flexible manner, compared with the more traditional MNS offerings.

Through this study, ISG is set to undertake comprehensive research with clear and definitive evaluation criteria. The study will cover the deliverables of MSPs and network operators in this marketplace.



Scope of the Report

This ISG Provider Lens™ quadrant report covers the following three quadrants for services/solutions: Managed Network Services Evolution, Managed Enterprise Connectivity Solutions (DIA, VoIP and VPN), and Network as a Service (NaaS).

This ISG Provider Lens™ study offers enterprise network decision-makers:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments (quadrants)
- Focus on the U.S. market

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

Provider Classifications

The provider position reflects the suitability of providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the service requirements from enterprise customers differ and the spectrum of providers operating in the local market is sufficiently wide, a further differentiation of the 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 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.

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).





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 Network Services Evolution

Managed Network Services Evolution

Who Should Read This Section

This quadrant report is relevant to enterprises across all industries in the U.S. for evaluating enterprise managed network service providers. It assesses providers' overall network vision and advisory capabilities, industry expertise, range of managed network service offerings and their ability to tailor services to meet clients' requirements.

In this quadrant, ISG outlines the current market positioning of managed network service providers in the U.S. and how they address the key challenges faced by enterprises.

As businesses expand and new technologies evolve, enterprises in the US face a plethora of challenges, from cybersecurity threats and network downtime to compliance and regulatory issues. Enterprises approach providers to offer well-rounded services that enable them to adopt the latest technologies and new immersive user experiences and fend off increasingly sophisticated cyber-attacks. They expect providers to deliver reliable connectivity with minimal downtime, using technologies like software-defined networks

for better network performance and traffic optimization. Additionally, enterprises seek proactive monitoring and maintenance to prevent network issues before they arise while ensuring cost efficiency. Flexibility in integrating new technologies and offering tailored solutions is also key to addressing unique business needs.

AI, ML, automation and generative AI are key areas of interest for enterprises. These technologies are being adopted to simplify network operations by introducing proactive anomaly detection, self-service and self-healing capabilities, which reduce the routine workloads of network operations center (NOC) teams, providing faster resolution and enhanced end-user experience.



Network professionals should read this report for insights on managed service trends, technologies and best practices for designing and implementing scalable, resilient network infrastructures.



CIO, CTO and other C-suite executives should read this report for insights on managed network services that align technology with business goals, optimize IT costs and enhance operational efficiency.



Cybersecurity professionals can learn how managed network services can enhance security, mitigate risks and ensure compliance with regulations, safeguarding critical enterprise assets.

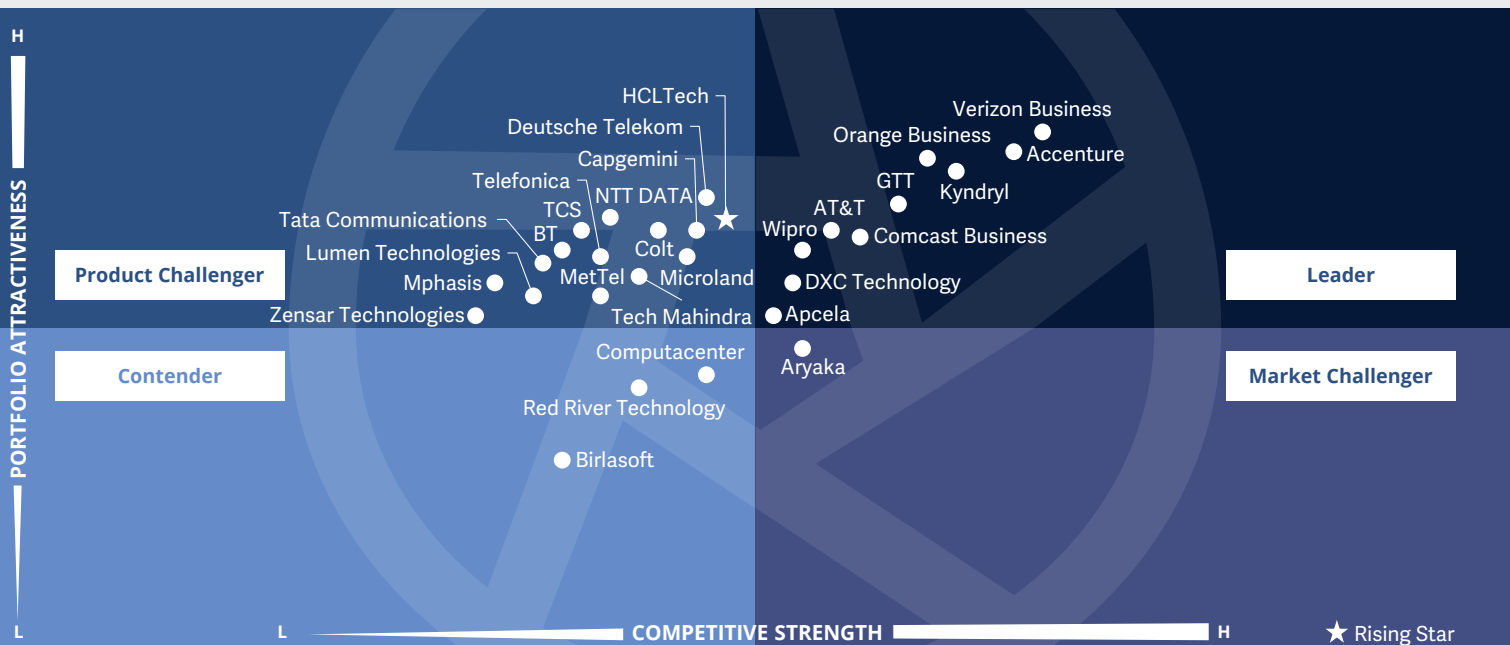


Procurement professionals can identify potential providers, compare pricing structures and understand contract nuances, enabling better negotiation of terms and cost savings.



Enterprise Managed Network Services Managed Network Services Evolution

U.S. 2024



This quadrant assesses providers capable of **delivering fully managed** network services, encompassing both **current technologies** and **next-gen, AI-driven solutions**, to create a secure transformational network.

Dr. Kenn D Walters



Managed Network Services Evolution

Definition

This quadrant examines the providers of enterprise network services — primarily multiprotocol label switching (MPLS)/IP WAN or LAN services, fully managed WLAN and branch installations, edge points of presence (PoPs), managed firewalls and security — that deliver these to enterprises as outsourced MNS.

MNS encompasses associated services such as advising and/or planning with an enterprise; provisioning fixed/mobile infrastructure directed toward streamlining its network operations; setting up, replacing or upgrading installations; managing and monitoring remote operations; and undertaking fault diagnosis, configuration management, update and patch management, and disaster recovery. These services are entirely managed by the MNS providers under a contract with an enterprise that includes hardware, software, third-party transport, spectrum and integrated tools as a part of a fully outsourced service. Businesses are adopting a plethora of network technologies to support their business goals and gain a competitive edge. They are seeking support

from MNS providers to take over their existing network operations while transforming them into strong, flexible and advanced enterprise infrastructures. The advances in network function virtualization (NFV) and AI-based technologies and the widespread use of diverse mobile, branch and edge devices — adding complexity and stress on enterprises' internal IT workforces — are further boosting the growth of the MNS market. Despite slower growth compared with the cloud segment, on-premises (including hybrid setups) is projected to remain the largest MNS segment in the near term.

Eligibility Criteria

1. Have a wide scope of products/services in the **MNS portfolio**
2. **Plan, deliver, implement and support** hardware and software aspects of a hybrid network
3. **Have a partner ecosystem** of leading providers, vetted to assist with overall delivery
4. **Effectively replace/upgrade** outdated network components, as required, to deliver **efficient, streamlined and reliable networks**
5. Offer simplified operations and management for clients through a **single pane of glass**
6. **Manage and meet** all SLAs of an enterprise network
7. **Have proven capability** to seamlessly implement and commercially deploy MNS, at scale, across industries
8. **Undertake comprehensive updates and apply the same** to networks with the needed frequency
9. **Show a significant volume** of reference customers/site deployments
10. **Competitive** in terms of offerings and commercials terms, including **guarantees on SLAs**



Managed Network Services Evolution

Observations

Enterprises in the U.S. are increasingly relying on comprehensive managed network services to assure seamless connectivity and operational efficiency. MNS providers cater to a broad spectrum of enterprise network needs, including, but not limited to, Multiprotocol Label Switching (MPLS) or IP Wide Area Network (WAN) or Local Area Network (LAN) services, fully managed wireless LAN (WLAN) and branch installations, edge points of presence (PoPs) and comprehensive security solutions, thereby offering a holistic outsourced managed network service. MNS transcend mere connectivity and wrap around associated services such as advising and planning with enterprises, provisioning of both fixed and mobile infrastructures aimed toward optimizing network operations; setting up, replacing or upgrading network installations; managing and monitoring remote operations; and undertaking tasks such as fault diagnosis, configuration management, update and patch management, and disaster recovery.

The holistic nature of these services implies that MNS providers fully manage them under a contract with an enterprise that includes hardware, software, third-party transport, spectrum and integrated tools as part of a fully outsourced service. The palpable shift toward outsourced network technologies and operations conveys businesses' intent to manage their existing network operations and transform them into robust, versatile and advanced enterprise infrastructures. The evolution of AI-based technologies and the pervasive use of diverse mobile, branch and edge devices have added complexity and stress on the internal IT workforces of enterprises, amplifying the growth of the MNS market. From the 57 companies assessed for this study, 29 qualified for this quadrant, with 10 being Leaders and one a Rising Star.

accenture

Accenture's comprehensive MNS offering is designed to manage and optimize an organization's network infrastructure, ensuring reliability, security and scalability.

Apcela

Apcela provides comprehensive, cloud-oriented MNS transformation projects in the U.S. with products and solutions that utilize AppHUB products and the Apcela Arcus Platform orchestrator.

AT&T

AT&T's managed network services are enterprise-level services designed to manage and optimize an organization's network infrastructure. These services cover a broad range of solutions.

Comcast Business

Comcast Business offers comprehensive lifecycle support in a carrier-agnostic manner. It leverages over 120 global and 300 North American connectivity providers to aggregate and optimize access technologies.

TECHNOLOGY

DXC Technology offers holistic digital transformation services, leveraging many disciplines and modernized MNS capabilities to deliver network solutions that address operational and business challenges. DXC is continuously investing in innovating MNS.

GTT MNS allows businesses to prioritize traffic based on the type of application, ensuring that critical applications perform optimally.



Managed Network Services Evolution

kyndryl

Kyndryl provides expert consulting, implementation and managed network services to support core-to-edge operations, including a portfolio of hybrid cloud connectivity run by a centralized monitoring and management system.



Business

Orange Business utilizes its Evolution Platform for MNS, which brings two major innovations, namely cloud-like network and security services and an innovation-friendly platform with direct access to the latest releases of multiple vendors.

verizon

Verizon Business employs multiple tools, including AI and ML, that are continually evolving to meet customers' ever-changing needs for network connectivity, security, reliability, performance and agility.



Wipro's MNS in the U.S. falls under its Digital Network Services domain, which also features a range of solutions such as Wipro Insightix™, NetFactory, CoDNI, NetBox, MDO and #WANFreedom.

HCLTech

HCLTech's (Rising Star) MNS practice maturity is supported by significant investment and innovation in technology, continuous improvement and value creation, which forms the bedrock of its MNS suite of advanced offerings.



GTT



"GTT's MNS provide enterprises with a comprehensive suite of managed connectivity and voice services. These services are supported by advanced monitoring, security and performance management tools, supported by a Tier 1 backbone."

Dr. Kenn D Walters

Overview

GTT offers MNS as part of its enterprise solutions, providing businesses with comprehensive, managed connectivity solutions tailored to their specific needs. The company uses its global Tier 1 Internet Protocol (IP) backbone to efficiently transport client traffic between locations worldwide, ensuring low latency and high performance. GTT's highly experienced solution engineers, design engineers, project managers and global technical team for on-premises hardware installation assure timely and on-budget delivery. The company provides monitoring through its EnvisionDX portal.

Strengths

Tailored solutions: GTT offers client-centric, fully personalized solutions to meet each customer's unique requirements. It offers varying levels of integrated security features through its own and partner-provided solutions. Its Envision DX portal, including EnvisionCORE and EnvisionEDGE, provides robust management features and visibility into applications.

Enhanced security practices: GTT offers UTM solutions that include firewall management, intrusion detection and prevention (IDP), anti-malware software and web content filtering, all managed through a single platform as a standard offering.

Global coverage and service consistency:

The GTT Envision platform combines the technology of EnvisionCORE and EnvisionEDGE for the virtual deployment of orchestrated network functions anywhere. This platform is managed, customized and controlled through a single digital experience with EnvisionDX. GTT's Managed and Professional Services team, comprising experienced and certified experts, supports customers in designing, building and running services. GTT's Tier 1 network provides extensive global coverage, including in Europe, North America and Asia, with consistent service levels.

Caution

GTT mainly focuses on multinational and large enterprises with multiple sites. However, there is an opportunity for GTT to venture into the midsize business segment. This area has seen major changes over the last two years, and by strategically realigning its segment coverage, GTT can capitalize on these developments.





Managed Enterprise Connectivity Solutions (DIA, VoIP and VPN)

Managed Enterprise Connectivity Solutions (DIA, VoIP and VPN)

Who Should Read This Section

This report is relevant to enterprises across all industries in the U.S. for evaluating managed enterprise connectivity solution providers. It assesses providers' overall network vision and connectivity capabilities, industry expertise, range of managed DIA, VoIP and VPN services, and their ability to tailor services to meet clients' requirements.

In this quadrant, ISG outlines the current market positioning of managed enterprise connectivity solutions (DIA, VoIP and VPN) providers in the U.S. and how they address the key challenges faced by enterprises.

The shift from traditional VPNs to more advanced models, such as ZTNA and SASE, highlights a significant transformation in how enterprises manage secure network access. As enterprises navigate a landscape characterized by increasingly distributed workforces, cloud-first strategies and the rise of edge computing, VPN limitations become more apparent. VPNs are often cumbersome, costly to maintain and inadequate for modern application environments. In response, providers are

delivering agile solutions backed by ZTNA and SASE that provide granular access controls and cloud-native security while aligning with enterprises' flexibility and scalability needs. Although VPNs remain relevant for legacy systems and specific use cases, their prominence is gradually diminishing.

The future of secure connectivity is shifting toward modern technologies that offer enhanced security, streamlined management and superior UX, making them better aligned with the demands of today's dynamic digital environment. To keep up with the evolving trends in VPNs, VoIP and DIA, enterprises expect providers to offer enhanced security and reliability, scalable cloud-based solutions and guaranteed performance with DIA.



Network professionals should read this report to gain insights into the implementation and optimization of DIA, VoIP and VPN services, ensuring effective network performance.



CIO, CTO and other C-suite executives should read this report to evaluate how managed connectivity solutions can enhance technological infrastructure and align with overall business strategy.



Cybersecurity professionals should read this report to evaluate security protocols related to managed connectivity, identify potential vulnerabilities and ensure compliance with industry regulations.

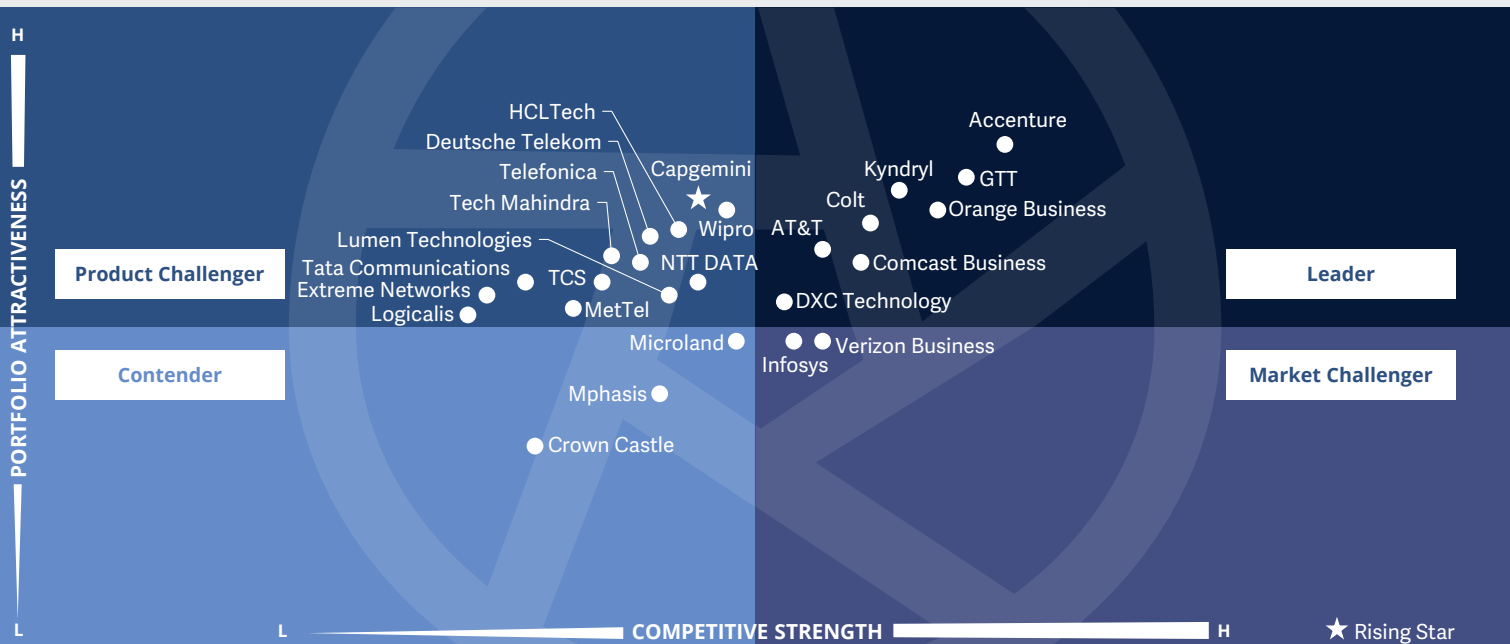


Procurement professionals should read this report to assess cost-effective solutions, negotiate contracts effectively, and understand the TCO associated with managed connectivity solutions.



Enterprise Managed Network Services Managed Enterprise Connectivity Solutions (DIA, VoIP and VPN)

U.S. 2024



This quadrant analyzes providers that offer **managed solutions** for advanced VPNs, DIA and **VoIP solution management**. These offerings may include managing existing systems as well as **upgrading and improving** solutions.

Dr. Kenn D Walters



Managed Enterprise Connectivity Solutions (DIA, VoIP and VPN)

Definition

This quadrant examines the providers of fully managed DIA, VoIP and/or VPN solutions for enterprises. Many enterprises choose to engage a provider to deliver and manage these discrete services, either bundled or as individual offerings.

DIA is a specialized internet service tailored for businesses that require a dedicated and private link with an internet service provider (ISP) that assures high-quality and reliable connectivity without the need to share bandwidth with other businesses. DIA delivers advanced features and high speeds and can be advantageous for businesses dependent on cloud applications, frequent streaming or have transactions involving large data volumes.

VoIP is witnessing significant growth, with the availability of high-speed broadband connections and 5G networks offering stable connections that allow seamless VoIP calls and high-quality video conferences. The increasing popularity of managed and third-party hosted VoIP solutions is playing a significant role in driving market growth, particularly with demand from businesses seeking flexible options.

VPN services have become crucial for organizations requiring secure and efficient connectivity solutions as alternatives to MNS or NaaS that may touch on public networks. Managed VPN solutions are designed to be secure, encrypted communication channels for organizations and their remote workforces. For many businesses, especially in the regulated government and financial sectors, managed VPNs have become essential for safeguarding data privacy and ensuring network security.

Eligibility Criteria

1. Offer a wide portfolio of comprehensive solutions covering various areas
2. Ability to plan, deliver, implement and support all hardware and software aspects of networks with standardized services and proprietary network transport
3. Successfully operate and manage all SLAs regarding an enterprise network
4. Proven capability in seamless implementation and commercial deployment at the required scale
5. Undertake comprehensive updates and apply the same to networks with the needed frequency
6. Show a significant volume of reference customer/site deployments
7. Competitive in terms of offerings and commercial terms



Managed Enterprise Connectivity Solutions (DIA, VoIP and VPN)

Observations

In contrast to the significant market growth and volume within the all-encompassing functionality of MNS in the U.S., the realm of VPN experiences particular attention for providing enterprises with fully managed Direct Internet Access (DIA), Voice over Internet Protocol (VoIP) and/or VPN solutions. Companies increasingly prefer to engage a provider to deliver and manage these specific services, whether as bundled offerings or individual services, often to offload existing staff or add new capabilities that current staff may not be able to adequately cover without further training.

DIA emerges as a specialized internet service tailored for businesses necessitating a dedicated link with an ISP. This connection assures high-quality, reliable connectivity and advanced features without sharing bandwidth with other entities, beneficial particularly for businesses reliant on cloud applications or those engaging in high-volume data transactions, especially where privacy of connection is of importance.

VoIP technology, on the other hand, is witnessing significant growth driven by the proliferation of high-speed broadband and 5G networks. These technologies offer stable connections that are crucial for seamless VoIP calls and high-quality video conferences, particularly when existing or new enterprise-specific communications systems are implemented as part of a unified communications strategy.

VPN and DIA services are increasingly cementing their place as crucial for organizations that require protected and efficient private connectivity solutions, such as businesses in highly regulated sectors such as government and finance.

From the 57 companies assessed for this study, 26 qualified for this quadrant, with eight being Leaders and one a Rising Star.

accenture

Accenture's enterprise services for VPN, DIA and VoIP are essential to a modern private (non-public MNS) ICT infrastructure.

AT&T

AT&T services are designed to provide businesses with secure, reliable and high-performance connectivity solutions.

colt

Colt allows businesses to dynamically manage and optimize their network traffic across multiple connections, including broadband, MPLS and LTE, based on application needs.

Comcast Business

Comcast Business' enterprise VPN, DIA and VoIP services provide comprehensive solutions for secure, reliable and high-performance enterprise networking and communication needs.

TECHNOLOGY

DXC Technology offers holistic digital transformation services, leveraging many disciplines and MNS capabilities to deliver DIA and VPN solutions to address operational and business challenges. DXC is continuously investing in innovating DXC MNS.

GTT

GTT provides guaranteed bandwidth with its DIA services, which provide businesses with dedicated, high-performance internet connections that guarantee bandwidth availability.

kyndryl

Kyndryl provides a suite of enterprise networking services, including VPN, DIA and VoIP. These services are tailored to meet the needs of large enterprises by ensuring secure, reliable and scalable connectivity solutions.



Managed Enterprise Connectivity Solutions (DIA, VoIP and VPN)



Business

Orange Business leverages its advisory-led approach and a strong lineup of solutions. It has expertise in the VPN, DIA and VoIP areas and a strong understanding of integrating these solutions and addressing customer requirements.



Capgemini (Rising Star) provides seamless integration, high availability and security features that differentiate its offerings from competitors.



GTT



"GTT's enterprise VPN, DIA and VoIP services are highly effective as managed services and enable enterprises to optimize their operations, improve communication and ensure the security of their data and voice services."

Dr. Kenn D Walters

Overview

GTT gives customers the flexibility to choose the technology that best suits their business needs, which is managed by GTT for solution supply. GTT offers a portfolio of enterprise-grade managed services, including VPN, DIA and VoIP, all designed to meet the specific needs of large businesses. These services are supported by advanced tools and technologies that ensure high performance, security and reliability through a comprehensive portfolio of managed networking and layered security solutions. In addition, transformational services are supplied to ease the adoption of new technology within enterprise organizations.

Strengths

MPLS- and SD-WAN-based VPN: GTT's MPLS-based VPNs are known for their resilience and security; these are further enhanced by the GTT SD-WAN VPN services, which enhance traditional VPN by allowing dynamic path selection across multiple links, including MPLS, broadband and LTE. SD-WAN provides greater flexibility, improved application performance and easier management through centralized orchestration, including via its Envision DX platform.

GTT DIA services: GTT provides guaranteed bandwidth with its DIA services, offering businesses dedicated, high-performance internet connections that guarantee bandwidth availability, unlike shared broadband connections.

This guaranteed bandwidth availability is crucial for enterprises relying on consistent, high-speed internet access. GTT's DIA offers symmetric upload and download speeds, essential for enterprises that utilize cloud services, large data transfers and real-time communication applications.

Attack surface focus: GTT also offers SSE, DDoS Protection, managed detection and response (MDR), and a range of security management tiers as value-added services complement its managed services. GTT leverages technology, data analytics and certified experts to provide managed threat detection across the entire network attack surface.

Caution

GTT focuses on multinational and large enterprises with multiple sites. However, this segment faces intense competition from numerous providers with strong portfolios. GTT needs to emphasize significant differentiation to retain its leadership position.





Network as a Service (NaaS)

Network as a Service (NaaS)

Who Should Read This Section

This report is relevant to enterprises across all industries in the U.S. for evaluating NaaS providers. It assesses providers' overall network vision, service model capabilities, industry expertise, range of NaaS offerings and their ability to tailor services to meet clients' specific needs.

In this quadrant, ISG outlines the current market positioning of NaaS providers in the U.S. and how they address the key challenges faced by enterprises.

NaaS is increasingly gaining traction in the enterprise network landscape, propelled by advancements in automation and Network Functions Virtualization (NFV). The rapid migration to cloud environments amplifies the demand for NaaS, as enterprises seek agile, scalable solutions that support their evolving needs. However, enterprises face various challenges, including integration complexities with existing infrastructures, security concerns and the need for continuous uptime and reliability. As a result, expectations from MSPs are rising.

Enterprises look for MSPs that offer robust and secure NaaS, seamless integration support, proactive management and comprehensive security measures. They prefer cost-effective solutions with predictable pricing, driven by the need for transparent billing. Flexible options, such as pay-as-you-go and subscription-based models, help them manage budgets and avoid unexpected costs, aligning spending with actual usage.

Coupling NaaS with security frameworks such as ZTNA, SASE and SSE addresses critical challenges, including data security, regulatory compliance and network reliability. Enterprises in the U.S. increasingly expect service providers to deliver integrated solutions that streamline connectivity and strengthen security measures against evolving threats.



CIO, CTO and other C-suite executives

should read this report to understand how NaaS can optimize operational efficiency, reduce costs and enable scalability for future growth.



Procurement and vendor management professionals

should read this report to understand NaaS' financial and operational benefits, which can help them evaluate providers and select the right service models.



Network professionals should read this report to gain insights into automation, network performance and security to make informed decisions on adopting NaaS for improved network resilience and flexibility.

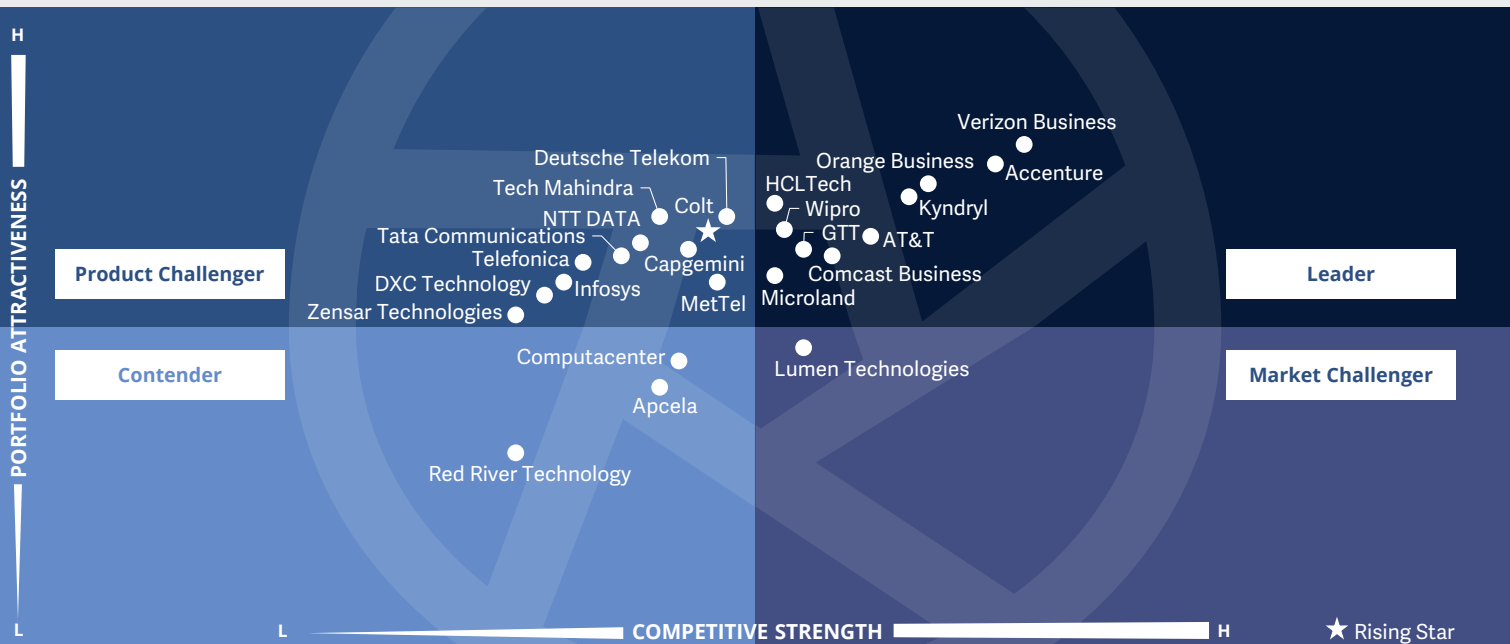


Cybersecurity professionals should read this report to learn how NaaS can reduce vulnerabilities by centralizing network control, improving visibility and enabling faster deployment of security patches.



Enterprise Managed Network Services Network as a Service (NaaS)

U.S. 2024



This quadrant evaluates providers that offer **NaaS**, comprising **contemporary and next-gen services**, to enterprises facilitating advanced networking and security in a **pay-as-you-go consumption model**.

Dr. Kenn D Walters



Network as a Service (NaaS)

Definition

This quadrant examines providers of NaaS that can rapidly integrate their offerings into enterprises based on existing commercial network deployments in different regions.

NaaS is a cloud-based service model, based in large part on the MEF model, where clients can rent networking services from providers, typically MSPs, telecom operators or cloud providers. With NaaS, enterprises can meet their networking requirements without the need to have related staff to maintain the networking infrastructure. NaaS combines flexible cloud computing with modern security models such as zero trust network access (ZTNA) to deliver advanced and updated network and security solutions to enterprises. NaaS can be rapidly deployed or removed, on demand, using centralized management tools. Standardized interfaces ensure compatibility with existing solutions.

NaaS solutions focus on orchestration, autoconfiguration, self-healing and adaptable services, which sets them apart from managed network services. Also known as network on demand (NoD), NaaS allows on-demand provisioning for enterprises in a pay-as-you-go model, effectively meeting the evolving demands of SaaS and various cloud platforms, including edge computing. NaaS replaces VPNs or MPLS/IP connections and can also eliminate the requirement for onsite firewalls. As a cloud service, NaaS provides enhanced flexibility and allows rapid customization, delivering cost savings without the need to acquire and maintain operational staff or hardware.

Eligibility Criteria

1. **Offer a wide portfolio of comprehensive solutions** covering various areas
2. **Successfully meet all SLAs** of an enterprise network
3. Offer simplified operations and management for clients through a **single pane of glass**
4. **Have proven capabilities** in deploying and managing cloud-based services and the delivery of tools/frameworks integrated with AI
5. **Have an understanding of the market** and the evolution and contributions of technologies, together with **industry-specific expertise and experience**
6. **Ability to leverage a wide range of partnerships** and management capabilities involving disparate providers and solutions for a customer
7. **Undertake comprehensive updates and apply the** same to networks with the needed frequency
8. **Show a significant volume** of reference customer/site deployments
9. **Competitive** in terms of offerings and commercial terms



Network as a Service (NaaS)

Observations

The Network as a Service (NaaS) paradigm in the U.S. represents a cloud-based service model significantly based on the Metro Ethernet Forum (MEF) model. This model allows clients — typically supplied by MSPs, telecom operators, SIs or cloud providers — to rent networking services that can rapidly integrate into enterprises based on current commercial network deployments across different regions. NaaS responds to enterprises' networking requirements without necessitating related enterprise staff to maintain the networking infrastructure. This model combines flexible cloud computing with contemporary security models such as ZTNA, SASE or security service edge (SSE) to provide updated network and security solutions. The on-demand provisioning characteristic of NaaS, facilitated by centralized management tools, exemplifies its adaptability to the evolving needs related to SaaS and various cloud platforms, including edge computing. NaaS' distinct approach toward orchestration, auto-configuration, self-healing and adaptable services sets it apart from managed network services. Also sometimes

termed as network on demand (NoD), NaaS favors a pay-as-you-go model, effectively addressing the dynamic demands of modern enterprises without necessitating significant investment in operational staff or hardware.

NaaS offers a bespoke set of benefits tailored to meet the evolving digital and operational needs of businesses today. It ensures robust, efficient and secure network infrastructure, provides flexible and high-quality connectivity solutions and embraces scalability with pay-as-you-go pricing.

From the 57 companies assessed for this study, 25 qualified for this quadrant, with 10 being Leaders and one a Rising Star.

accenture

Accenture's NaaS delivers on-demand networking with scalable network resources that can be provisioned as needed. It provides centralized management with unified control and monitoring of the network from a single platform.

AT&T

AT&T's NaaS is modular, allowing businesses to select the specific network functions and services they need, such as connectivity, security and performance optimization, and pay an on-demand usage subscription.

Comcast Business

Comcast Business' NaaS is typically offered on a subscription basis, allowing businesses to pay only for the services and resources they use. This model reduces capital expenditures and provides cost predictability.

GTT

GTT's NaaS allows businesses to outsource their networking needs, leveraging GTT's global infrastructure and expertise while focusing on core business activities with low or no risk.

HCLTech

HCLTech's NaaS enables enterprises to consume enterprise network services encompassing underlying hardware, operating system or platform, support services and software footprint, as a single as-a-service offering.

kyndryl

Kyndryl's NaaS offering is centered on its network and edge management practice, designed to provide enterprises with a flexible, scalable and fully managed networking solution.

MICROLAND®

Microland's NaaS is a comprehensive solution that enables enterprises to consume network services encompassing operating platforms, services and the underlying hardware and software footprint.



Network as a Service (NaaS)



Business

Orange Business leverages its powerful and advanced Evolution Platform to develop key digital services, integrating security and coinnovating, consumable as required by clients in a NaaS model.



Verizon Business' NaaS encompasses hybrid networking, virtual network services, orchestration, service-chaining and automation, which can improve efficiency with hybrid (private or public) networking to help customers move to more distributed infrastructures.



Wipro's NaaS solution, powered by Verizon and other partners, is designed to deliver performance, improve trust, elevate CX and create differentiation via advanced next-gen technology and solutions.



Colt's (Rising Star) NaaS supports edge computing, enabling data processing closer to where it is generated. This approach reduces latency and improves performance for time-sensitive applications, such as IoT and real-time analytics.





"GTT's NaaS service offers a comprehensive, flexible and scalable solution for enterprise networking needs, with advanced tools for network management, security and cloud integration."

Dr. Kenn D Walters

Overview

GTT offers NaaS to enterprise customers, providing a flexible and scalable approach to network management. NaaS from GTT allows businesses to outsource their networking needs, leveraging GTT's global infrastructure and expertise while focusing on core business activities. The company uses its global Tier 1 IP backbone to efficiently transport client traffic between locations worldwide, ensuring low latency and high performance. GTT has highly experienced solution engineers, design engineers, project managers and a global technical team for on-premises hardware installation, ensuring timely and on-budget delivery.

Strengths

Consistent service levels: The GTT Envision platform combines the technologies of EnvisionCORE and EnvisionEDGE for the virtual deployment of orchestrated network functions anywhere. These functions are managed, customized and controlled through a single digital experience with EnvisionDX. GTT's Tier 1 network, which spans Europe, North America and Asia, provides extensive global coverage with consistent service levels.

Application acceleration and monitoring: GTT empowers clients to establish network traffic business policies and direct applications through optimal path selection. It also provides comprehensive monitoring via its EnvisionDX solution, including

EnvisionCORE and EnvisionEDGE, to allow full clarity and depth of information or comanagement options.

Integrated security and compliance services: GTT's NaaS includes integrated security features such as firewalls, VPNs and encryption to protect data as it traverses the network. Security services are continuously updated to protect against evolving threats. NaaS includes DDoS mitigation services, ensuring that the network remains operational even during large-scale attacks aimed at disrupting services. GTT's NaaS services are designed to help businesses comply with industry regulations and standards, including data protection and privacy requirements.

Caution

NaaS has become one of the most competitive segments within the enterprise network market and has a complete range of supplier types active within it. GTT must constantly highlight success stories and solutions from the local market to maintain its position as a Leader.





Star of Excellence

A program, designed by ISG, to collect client feedback about providers' success in demonstrating the highest standards of client service excellence and customer centricity.



Appendix

Methodology & Team

The ISG Provider Lens 2024 – Enterprise Managed Network Services study analyzes the relevant service providers in the U.S. market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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The research and analysis presented in this study will include data from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. ISG recognizes the time lapse and possible market developments between research and publishing, in terms of mergers and acquisitions, and acknowledges that those changes will not reflect in the reports for this study.

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

The study was divided into the following steps:

1. Definition of Enterprise Managed Network 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 and Author

Dr. Kenn D Walters
Distinguished Lead Analyst

Dr. Kenn Walters is a highly skilled senior executive with over 40 years of experience in directing and managing major transformational technology projects, research and development programs, as well as extensive experience within providers and in global industry research and executive advisory. For ISG, Kenn has written over 100 articles for ISG Insights in areas such as digital transformation, cloud networks, SD networking, MNS, SASE and digital disruptors.

He is a Distinguished lead analyst and author for multiple regions in the Provider Lens™ reports, (<https://isg-one.com/research/isg-provider-lens>) in such areas as Networks – Software Defined Networking, Digital Business Software and Services, and Contact Center CX. He holds a BSc, MSc, and Ph.D. in computer science and communications systems. He is a judge of the prestigious global World Communications Awards.



Research Analyst

Deepika B
Senior Research Analyst

Deepika is a Senior Research Analyst at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on Cybersecurity - Services and solutions, Telecommunication, Media and Entertainment Services and Networking – Software defined Solutions and Services. She works closely with the Lead author from diverse regions in the research process. She also authors enterprise context and global summary reports. She has over 4 years of experience in the technology research industry and has carried out various client-facing ad-hoc projects across industries

such as Automotive, BFSI, and Retail & Consumer Goods. Prior to this role, she was also accountable for maintaining a constant eye on the technology market and providing insightful quantitative and strategic analysis to clients through market sector reports.



Author & Editor Biographies

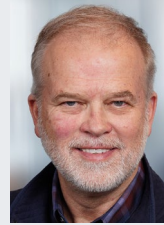


Study Sponsor

Heiko Henkes
Managing Director, ISG Provider Lens™

Heiko Henkes serves as Managing Director and Principal Analyst at ISG, where he oversees the Global ISG Provider Lens™ (IPL) Program for all IT Outsourcing (ITO) studies alongside his pivotal role in the global IPL division as strategic program manager and thought leader for IPL Lead Analysts. Additionally, Henkes heads the Star of Excellence, ISG's global customer experience initiative, steering program design and its integration with IPL and ISG's sourcing practice.

His expertise lies in guiding companies through IT-based business model transformations, leveraging his deep understanding of continuous transformation, IT competencies, sustainable business strategies, and change management in a Cloud-AI-driven business landscape. Henkes is renowned for his contributions as a keynote speaker on digital innovation, where he shares insights on leveraging technology for business growth and transformation.



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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