

# Enterprise Managed Network Services

A detailed study of the enterprise  
managed network services market



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Enterprise networks are becoming strategically vital. Rather than being static infrastructure assets, networks are becoming intelligent, software-defined platforms that enable secure, adaptive and resilient digital business operations. As hybrid work models expand and enterprise applications become increasingly distributed, the role of managed network services (MNS) is evolving.

The ISG Provider Lens™ Enterprise Managed Network Services 2025 study explores a broad spectrum of MNS capabilities, including managed WAN and LAN, direct internet access (DIA), voice over IP (VoIP), virtual private networks (VPN) and increasingly modular network-as-a-service (NaaS) models. These offerings are enhanced through automation, AI-driven operations (AIOps), identity-aware access policies and deep integration with edge and cloud environments.

Modern MNS portfolios address enterprise concerns around network flexibility, performance, compliance and visibility. Key enablers such as zero trust architectures, open API-based orchestration, sovereign

cloud integration and support for post-quantum encryption are gaining relevance. At the same time, advanced monitoring, fault remediation, disaster recovery and SLA-backed service delivery remain foundational.

This study will systematically benchmark managed service providers and network operators based on their ability to deliver future-ready, secure and scalable network services that meet enterprise needs in a dynamic technology landscape. This study complements the ISG Provider Lens™ Software-Defined Networking (SD-Networks) report, offering a broader perspective on how enterprises source, operate and modernize their network infrastructure and services.



## Managed Network Services 2025 – Coverage Overview

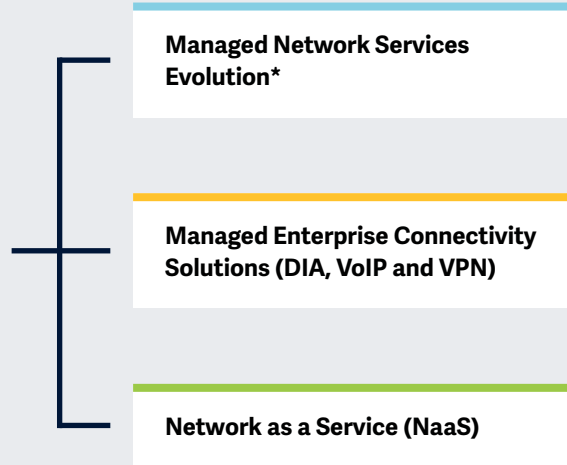
Anchors & Key Drivers	2025 Quadrants	Services	Components/ Tools
<b>Innovation</b> IP – accelerators in Data, AI Sandboxes, Cloud, etc.	<b>Managed Network Services Evolution</b>	Advisory/Consulting	MPLS, IP/VPN, LEO SAT, Ethernet, Cloud/DC, Wireless SD-Networks Connectors
<b>Security &amp; GRC</b> Data – System		Provisioning/Installation/Upgrading with 3 <sup>rd</sup> party vendor systems	LAN/WLAN, SD-LAN & WAN/SD-WAN
<b>Agile, devSecOps, NetOps, &amp; SRE Frameworks</b> Standards as Code, Zero Trust Security, Digital Tech and Architectural Convergence		Automated Operations Support (incl. routing, pattern analysis)	Firewalls/Security/SASE/SSE inclusion
<b>Enterprise Value Management</b> ESG, Strategy, Data/Devices Management, Multiaccess, Multi-vendor, multi-cloud, IT-OT convergence		Fault Diagnosis, Recovery, Configuration Management, Business Continuity, Security, SLA checks	Branch, Edge PoPs and related orchestration tools
<b>Management and Deployment</b> Compliance, patch, SLA and configuration, performance management, AIOps, Service Automation	<b>Managed Enterprise Connectivity Solutions (DIA, VoIP and VPN)</b>	App/services performance (latency, jitter, and packet loss, etc.)	Monitoring & reporting with differentiated AI, ITSM and CX tools
<b>Competency &amp; Talent</b> Resources– certifications –re-skilling		Security (IDS/IPS), encryption, and regulatory compliance services	VoIP/Video over IP (PSTN integrators)
		Implementation/bandwidth supply and upgrade	Fault Diagnosis, Recovery, Configuration Management tools
	<b>Network as a Service (NaaS)</b>	N/w orchestration (Auto-config/self-healing, AIOps, ML optimization)	Hosted SDWAN/Branch/SASE, SSE as-a-service tools/frameworks
		ZTNA/AI driven services/Security	AI/Gen AI tools/frameworks/automated & standard interfaces
		Adaptable business services (flexible consumption models)	Cloud-based service management & delivery frameworks

Source: ISG Provider Lens™, 2025



The report analyzes providers offering **MNS, managed DIA, VoIP or VPN networks, NaaS solutions** and consumption models.

Simplified Illustration Source: ISG 2025



## Definition

The ISG Provider Lens™ Enterprise Managed Network Services study offers the following to business and IT decision-makers:

- Transparency of the strengths and weaknesses of relevant providers and their offerings
- Differentiated positioning of providers in each quadrant based on their competitive strengths and portfolio attractiveness
- Focus on different markets, including APAC, Europe and the U.S.

Our study serves as an important decision-making basis for positioning, key relationships and go-to-market (GTM) considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their current vendor relationships and potential engagements.

*\*For the APAC region, Managed Network Services Evolution could have a separate midmarket quadrant to cover niche and local providers.*



## Managed Network Services Evolution

### Definition

This quadrant focuses on providers that deliver fully managed, enterprise-grade network services under long-term outsourcing agreements. They take end-to-end responsibility for network infrastructure across core and distributed enterprise environments.

The scope includes managed services for MPLS and IP-based WAN and LAN, wireless LAN (WLAN), branch office connectivity, edge points of presence (PoPs), firewalls and enterprise network security. Services cover the entire lifecycle, from consulting and provisioning to monitoring, management and continuous improvement, and are governed by service-level agreements (SLAs) that bundle hardware, software, connectivity and operational tools.

In 2025, MNS providers need to embed automation, AI-driven operations and zero trust enforcement into their delivery models. SLAs reflect sustainability goals, application performance and real-time responsiveness, making MNS a strategic enabler for future-ready enterprise networks crucial for advanced digital businesses.

### Eligibility Criteria

1. Offer a **broad portfolio of fully managed network services**, including connectivity, security and edge network solutions, under unified outsourcing contracts
2. Deliver end-to-end lifecycle capabilities across **planning, implementation, operations, upgrades and support** for fixed and mobile enterprise networks
3. Provide **integrated management platforms** with unified dashboards enabling **centralized monitoring**, SLA tracking, policy enforcement and performance analytics
4. **Operate and orchestrate** hardware and software components of **hybrid and distributed enterprise networks**, ensuring modularity and scalability
5. **Replace or modernize legacy infrastructure** with **minimal disruption**, supporting industry-specific compliance, continuity and availability needs
6. Maintain a **mature partner ecosystem** that includes hardware vendors, telecom carriers and security providers to **enable seamless service integration**
7. Enable open API interfaces and self-service portals that **support automation**, dynamic policy configuration, **SLA cocreation** and sustainability **reporting metrics**



## Managed Enterprise Connectivity Solutions (DIA, VoIP and VPN)

### Definition

This quadrant focuses on providers that offer fully managed connectivity solutions for enterprise clients, especially dedicated internet access (DIA), voice over IP (VoIP) and VPNs. These providers take responsibility for planning, deploying and operating these services — either as standalone offerings or bundled packages — under SLAs that address performance, security and compliance.

DIA offers dedicated high-performance internet access with guaranteed bandwidth, service reliability and routing control. Managed VoIP services support secure, integrated voice and video communication and increasingly include UCaaS platforms. VPN solutions offer encrypted and private connectivity, particularly valuable for organizations operating in regulated sectors or hybrid environments.

These services are often positioned as complements or alternatives to broader MNS or NaaS frameworks, with rising demand for sovereign routing, identity-aware access and compliance with evolving cryptographic standards.

### Eligibility Criteria

1. Provide a **broad portfolio of managed DIA, VoIP and/or VPN services**, including bundled and standalone options, tailored for enterprise use cases
2. Deliver end-to-end lifecycle capabilities that include **network planning, provisioning, implementation, operation and support**, including proprietary or standardized transport
3. Demonstrate the ability to **meet SLA commitments** across connectivity **performance**, availability, voice quality and **secure access metrics**
4. Prove successful, scalable **deployments across industries**, including regulated and security-sensitive environments
5. Maintain the ability to **upgrade and adapt services regularly**, applying improvements with the required frequency and minimal disruptions
6. Support enterprise needs for **data sovereignty, identity-based policy** enforcement and readiness for post-quantum and **modern cryptography protocols**
7. Compete effectively on service differentiation and **commercial flexibility, including SLA guarantees** and transparent pricing models





## Network as a Service (NaaS)

### Definition

This quadrant focuses on providers that deliver cloud-based NaaS solutions to enterprise clients. They offer on-demand, consumption-based connectivity and network functions that eliminate the need for clients to own and operate in-house infrastructure while supporting agility, scalability and operational efficiency.

Aligned with MEF-defined NaaS principles, these solutions combine network and security services that are centrally managed, rapidly provisioned and fully orchestrated. Providers enable seamless integration with existing enterprise networks using standardized interfaces and tools for automation, observability and control.

NaaS platforms emphasize adaptability, self-healing, auto-configuration and programmable orchestration. These attributes support dynamic workloads, compliance needs and evolving enterprise architectures. With increasing focus on sustainability and sovereignty, NaaS models also embed capabilities such as carbon-aware routing and integration with sovereign clouds.

### Eligibility Criteria

1. Offer a **broad and integrated portfolio of NaaS solutions** covering connectivity, security, orchestration and lifecycle management
2. **Demonstrate consistent SLA adherence** across service performance, uptime, orchestration reliability and customer experience metrics
3. Provide **centralized orchestration platforms** (single pane of glass) that support **self-service management, real-time analytics and unified reporting**
4. **Proven experience in deploying and managing** scalable, cloud-native services, including integration of AI-driven tools and policy automation
5. Bring **strong domain expertise, including industry-specific NaaS** use cases, and demonstrate innovation aligned with market evolution
6. Enable **integration across multivendor and multicloud environments** through open APIs and programmable interfaces
7. Maintain **regular service updates and enhancements**, applied at high frequency and minimal disruption to ensure responsiveness
8. Provide documented success through **large-scale reference deployments** across industries and geographies
9. Support **sovereign cloud options, sustainability-linked functions** such as carbon-aware routing and **flexible provisioning models**
10. Compete effectively on modularity, **pricing transparency** and **consumption-based service flexibility**





## Quadrants by Region

As part of this ISG Provider Lens™ quadrant 2025 study, we are introducing the following three quadrants for Enterprise Managed Network Services:

Quadrant	Europe	U.S.	APAC*
Managed Network Services Evolution	✓	✓	✓
Managed Enterprise Connectivity Solutions (DIA, VoIP and VPN)	✓	✓	✓
Network as a Service (NaaS)	✓	✓	✓

\*APAC covers India, ANZ, ASEAN (Singapore, Indonesia, Thailand, Malaysia, the Philippines and Vietnam), Japan and South Korea markets but excludes China. Also, for APAC, the MNS Evolution quadrant could have a separate midmarket quadrant to cover niche and local/regional providers.



The research phase falls in the period between June and July 2025, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in December 2025.

Milestones	Beginning	End
Survey Launch	June 17, 2025	
Survey Phase	June 17, 2025	July 25, 2025
Sneak Preview	October 2025	
Press Release & Publication	December 2025	

Please refer to the [ISG Provider Lens™ 2025](#) research agenda to view and download the list of other studies conducted by ISG Provider Lens™

### Access to Online Portal

You can view/download the questionnaire from [here](#) using the credentials you have already created or refer to instructions provided in the invitation email to generate a new password. We look forward to your participation!

### Buyers Guide

ISG Software Research, formerly “Ventana Research,” offers market insights by evaluating technology providers and products through its Buyers Guides. The findings are drawn from the research-based analysis of product and customer experience categories, ranking and rating software providers and products to help facilitate informed decision-making and selection processes for technology.

In the course of the Managed Network Services 2025 IPL launch, we want to take advantage of the opportunity to draw your attention to related research and insights that ISG Research will publish in 2024. For more information, refer to the [Buyers Guide research schedule](#).

### Research Production Disclaimer:

ISG collects data for the purposes of writing research and creating provider/vendor profiles. The profiles and supporting data are used by ISG advisors to make recommendations and inform their clients of the experience and qualifications of any applicable provider/vendor for outsourcing the work identified by clients. This data is collected as part of the ISG FutureSource™ process and the Candidate Provider Qualification (CPQ) process. ISG may choose to only utilize this collected data pertaining to certain countries or regions for the education and purposes of its advisors and not produce ISG Provider Lens™ reports. These decisions will be made based on the level and completeness of the information received directly from providers/vendors and the availability of experienced analysts for those countries or regions. Submitted information may also be used for individual research projects or for briefing notes that will be written by the lead analysts.



### ISG Star of Excellence™ – Call for nominations

The Star of Excellence™ is an independent recognition of excellent service delivery based on the concept of “Voice of the Customer.”

The Star of Excellence™ is a program, designed by ISG, to collect client feedback about service providers’ success in demonstrating the highest standards of client service excellence and customer centricity.

The global survey is all about services that are associated with IPL studies. In consequence, all ISG Analysts will be continuously provided with information on the customer experience of all relevant service providers. This information comes on top of existing first-hand advisor feedback that IPL leverages in context of its practitioner-led consulting approach.

Providers are invited to [nominate](#) their clients to participate. Once the nomination has been submitted, ISG sends out a mail confirmation to both sides. It is self-evident that ISG anonymizes all customer data and does not share it with third parties.

It is our vision that the Star of Excellence™ will be recognized as the leading industry recognition for client service excellence and serve as the benchmark for measuring client sentiments.

To ensure your selected clients complete the feedback for your nominated engagement please use the Client nomination section on the Star of Excellence™ [website](#).

We have set up an email where you can direct any questions or provide comments. This email will be checked daily, please allow up to 24 hours for a reply.

Here is the email address:

[star@cx.isg-one.com](mailto:star@cx.isg-one.com)



**ISG Star of Excellence**



The ISG Provider Lens 2025 – Enterprise Managed Network Services research study analyzes the relevant software vendors/service providers in the global market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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Abhilash M V

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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.



## Contacts For This Study

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**Abhilash M V**  
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Manager**



### ISG Provider Lens Advisors Involvement Program

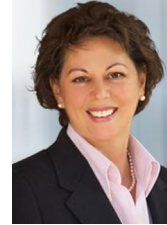
ISG Provider Lens offers market assessments incorporating practitioner insights, reflecting regional focus and independent research. ISG ensures advisor involvement in each study to cover the appropriate market details aligned to the respective service lines/technology trends, service provider presence and enterprise context.

In each region, ISG has expert thought leaders and respected advisors who know the provider portfolios and offerings as well as enterprise requirements and market trends. On average, three advisors participate as part of each study's quality and consistency review team (QCRT). The QCRT ensures each study reflects ISG advisors' experience in the field, which complements the primary and secondary research the analysts conduct. ISG advisors participate in each study as part of the QCRT group and contribute at different levels depending on their availability and expertise.

The QCRT advisors:

- Help define and validate quadrants and questionnaires,
- Advise on service provider inclusion, participate in briefing calls,
- Give their perspectives on service provider ratings and review report drafts.

## ISG Advisors to this study



Margot  
Wall

**Principal  
Consultant**



Liam  
Chin

**Principal  
Consultant**



## Invited Companies

**If your company is listed on this page or you feel your company should be listed, please contact ISG to ensure we have the correct contact person(s) to actively participate in this research.**

Accenture	Arctoslabs	BT	ConvergeOne
Acronym Solutions	Arelion	Cable & Wireless Communications	Cyient
ActivePort Group Ltd	Aryaka	Cambium Networks	Damovo
AD Network Solutions	AT&T	Capgemini	Data#3 Limited
Adtran Networks	Atos	CBTS	Datacom
Advanced Information Technology Public Company Limited	ATSG	Celcom Axiata	Deutsche Telekom
Akamai	Aussie Broadband Limited	Celcom Malaysia	DiGi Malaysia
Alcatel-Lucent Enterprise	Axiata Group Berhad	Ceragon Networks	Dragonfly Technologies Pty Ltd
Alkira Networks	Becom	Claranet	DXC Technology
Allied Telesis Holdings K.K.	Bendigo Telco Limited	Coforge Limited	DXN limited
Apcela	Bharti Airtel	Cogent Communications, Inc.	Empist
Appex Networks	Big Network	Commscope	Enea
APX Net, Inc	Blackbox	Controlware	EpsilonTel
Aqovia	BlueAlly	Converge ICT Solutions	Ericsson
	Boldyn Networks	Converged Communications	Expereo





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Externetworks	Hubify Limited	Kerv	Mphasis
Extreme Networks	Hughes Network Systems	Korea Telecom	N2N Connect Berhad
FPT Vietnam	IBM	KPN	NEC
Frontier	iliad/Free	Kyndryl	NexGen
Fujitsu	Inde	L2X Tech	Nexion Networks
GAVS Technologies	Indosat	LG CNS	Nile Secure
Globalgig	Infoline Tec Group Berhad	LG Uplus	Nokia
Globe Telecom	Infosys	Logicalis	Nomios
Graphiant	Insta ICT solutions	Lumen	Ntegrator Holdings Limited
GTT	Interactive Pty Ltd	M1	NTT Data
Happiest Minds	Internet Thailand Public Company Limited	Macquarie Technology Group Limited	Nuvias
HCLTech	Intervision	Maxis	Open Systems
HFCL	Intuitorit	Megaport	Optus
HPE Aruba	Join	MetTel	Orange Business
Huawei	Juniper	Microland	PacketFabric



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PCCW	Qoria Limited	Starhub	Telekom Malaysia
Peplink	Rakuten Mobile	Stratus Networks	Telekomsel Indonesia
Persistent Systems Limited	Ramen Networks	Superloop Limited	Telenet
Pica8	Reliance Jio	Swisscom	Telenor
PLDT	Route Mobile	Syringa Networks	Telesystem
Presidio	Samsung SDS	Systal	Telia
Presidio Networked Solutions LLC	Sencinet	Talari Networks	Telin
Privasia Technology Berhad	Sify technologies	Tata Communications	Telkom Indonesia
Proximus	Singtel	Tata Elxsi Limited	Telstra
PT DCI Indonesia Tbk	SKT	Tata Teleservices (Maharashtra) Limited	Teneo
PT Indosat	Smartfren Telecom	TCS	Terago
PT Mora Telematika Indonesia Tbk	Softcat	TDS Telecom	Time dotCom
PT Smartfren Telecom Tbk	Sonera	Tech Mahindra	T-Mobile
PT Telekomunikasi Indonesia Tbk	Spark New Zealand	Telekom Austria	TNF
PT XL	Spectra	Telekom Italia	TNNet



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TPG Telecom

TPX

True Corporation

UST

Ventia Pty Ltd

Verizon

Vietnamobile Vietnam

Viettel Vietnam

VMO2B

VNPT Vietnam

Vocus

Vodafone

Vonex

Wavenet

Wipro

XTIUM

Zensar Technologies

Zones

ZTE



### 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](#).

### iSG Research™

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research™ delivers guidance that helps businesses accelerate growth and create more value.

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For more information about ISG Research™ subscriptions, please email [contact@isg-one.com](mailto:contact@isg-one.com), call +1.203.454.3900, or visit [research.isg-one.com](https://research.isg-one.com).

### iSG

ISG (Nasdaq: III) is a global AI-centered technology research and advisory firm. A trusted partner to more than 900 clients, including 75 of the world's top 100 enterprises, ISG is a long-time leader in technology and business services sourcing that is now at the forefront of leveraging AI to help organizations achieve operational excellence and faster growth.

The firm, founded in 2006, is known for its proprietary market data, in-depth knowledge of provider ecosystems, and the expertise of its 1,600 professionals worldwide working together to help clients maximize the value of their technology investments.

For more information, visit [isg-one.com](https://isg-one.com).





**JUNE, 2025**

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**REPORT: ENTERPRISE MANAGED NETWORK SERVICES**