ISG Provider Lens®

Enterprise Managed Network Services

A detailed study of the enterprise managed network services market

Customized report courtesy of:

orange Business

QUADRANT REPORT | DECEMBER 2025 | EUROPE

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Business success depends on effectively overseeing advanced network provisioning and operations

The managed network services (MNS) market has historically encountered resistance from many European enterprises that preferred to rely on large in-house IT and data operations teams. This reluctance stemmed from a long-standing tradition of internal ownership and control over mission-critical network infrastructure. For many years, organizations across various industries, including manufacturing, finance, energy, healthcare, logistics and government institutions, have maintained their own data centers, private WAN connections and on-premises networking resources. While early MNS offerings were relatively narrow in scope, primarily focused on wired connectivity and basic network maintenance, the market has since undergone a profound transformation.

Today's MNS landscape encompasses a broad spectrum of AI-assisted and AI-driven capabilities across complex ICT environments, from centralized data centers to WAN, branch offices and network edge environments. MNS solutions now support multiple delivery models — wired, wireless and satellite connectivity — to accommodate the increasing demands of hybrid network architectures and global operations. They address both the operational layer and strategic functions such as network orchestration, security, multicloud connectivity and software-defined networking (SDN). This evolution is particularly critical in Europe, where enterprises operate in an environment of heightened security expectations, stringent data sovereignty rules and rigorous compliance obligations.

Modern ICT infrastructures are no longer static; they are dynamic, distributed and constantly evolving. MNS providers now deliver services that extend from underlay management of the physical infrastructure through overlay services, which involve sophisticated virtualized network

MNS is a **vital initiative** that drives **secure and advanced** enterprise networking.

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functions, AI-driven analytics and intelligent automation. In today's threat-heavy environment, enterprises are expected to maintain strong security postures, minimize downtime, comply with multiple regulatory regimes and support increasingly mobile and cloud-centric workforces. MNS has therefore emerged as a cornerstone of these efforts, providing technical solutions and delivering strategic value.

The rise of MNS in the context of hybrid work and AI acceleration

The past few years have seen dramatic shifts in how enterprises and public sector organizations operate. Hybrid work, remote access and distributed teams have become standard, creating new complexities for IT and network teams. Concurrently, digital transformation initiatives and rapid innovation in AI-powered infrastructure have intensified the need for sophisticated network management strategies.

Enterprises must now ensure that employees can securely and reliably connect to business applications and services from virtually anywhere. Modern network environments must support a mix of legacy infrastructure, cloud workloads, IoT devices and edge computing platforms. Simultaneously, cyber threats are becoming more advanced and persistent, making continuous monitoring, rapid incident response and proactive defense essential.

This evolving landscape has created fertile ground for MNS, network-as-a-service (NaaS) and specialized providers. Instead of building, owning and managing complex infrastructures internally, enterprises are increasingly turning to external providers with advanced expertise, automation capabilities and specialized staffing. The adoption of AI and generative AI (GenAI) further accelerates this shift by enabling network operators to automate routine tasks, enhance predictive analytics and improve incident detection and response times. These technologies reduce operational burdens for enterprises, allowing MNS providers to offer more efficient, scalable and secure services.

Enterprise network challenges in Europe

As of 2025, the key factors shaping enterprise networks in Europe closely mirror global trends but are strongly influenced by region-specific regulatory, technological and operational realities. Modern enterprises face a wide range of network challenges, including:

- **Network heterogeneity:** Organizations must integrate core, cloud and edge networks across fixed and mobile, wired, wireless and satellite links, as well as public and private domains. This involves managing multiple layers of technology and ensuring interoperability between systems from different vendors.
- **Performance and reliability:** Business continuity depends on high stability and uptime. With hybrid workforces, critical applications must perform consistently whether accessed from headquarters, branch offices or home networks.
- **Cost efficiency:** Organizations must balance operational budgets with growing infrastructure complexity, ensuring they maintain secure and efficient operations without excessive capital expenditure.
- **Regulatory compliance:** European enterprises face strict privacy and security obligations, including laws and frameworks such as the GDPR, the California Consumer Privacy Act (CCPA) for global operations and the Health Insurance Portability and Accountability Act (HIPAA) in specific sectors. Compliance requires sophisticated data handling, auditing and reporting capabilities.
- **Technology refresh cycles:** The pace of technological change continues to accelerate, requiring frequent upgrades and modernization of network infrastructures.
- **Mobility and cloud integration:** With growing reliance on public and private clouds, organizations must enable secure cloud adoption, support mobile and remote workforces and integrate private 5G networks and low earth orbit (LEO) satellite connectivity to reach distributed sites.
- **IoT management:** The proliferation of IoT devices introduces security, monitoring and management challenges, as well as the need for scalable and resilient connectivity.

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- **Skills gap:** Recruiting, training and retaining skilled staff capable of managing advanced technologies has become increasingly difficult.
- **Provider complexity:** Many enterprises rely on multiple service providers for connectivity, security, cloud and application delivery, creating challenges in coordination and integration.

These challenges are especially pronounced in industries where uptime, security and regulatory compliance are non-negotiable. For example, financial services firms must ensure both transactional integrity and compliance with cross-border data transfer rules; healthcare organizations must guarantee patient data confidentiality while enabling telehealth solutions; manufacturing enterprises must support connected production environments with minimal downtime.

MNS solutions and business focus areas

MNS providers have structured their offerings to address the aforementioned challenges systematically. Three major business focus areas have emerged:

1. **MNS evolution and end-to-end network services**

Modern MNS offerings are far more sophisticated than traditional managed connectivity services. Providers now deliver comprehensive solutions covering the entire network lifecycle, from provisioning and operations to monitoring, security and strategic advisory. Key elements include:

- **Provisioning, operations and monitoring:** MNS providers ensure continuous network performance and security through proactive monitoring, rapid incident response and predictive analytics powered by AI and automation.
- **Security frameworks:** Advanced security capabilities include next-generation firewalls, regular security audits, integrity checks, and intrusion detection and prevention systems (IDS/IPS). Providers integrate security into the network fabric, creating resilient and compliant infrastructures.
- **Upgrades and expertise:** Providers bring deep technical expertise and continuously enhance network capabilities through regular upgrades, best-practice implementations and proactive maintenance.
- **Flexible engagement models:** Enterprises can choose between full estate acquisition, where the MNS provider takes responsibility for the entire network, and phased upgrades targeting specific domains (for example, LAN, WAN, cloud, security).
- **Consulting and advisory:** Beyond operations, providers offer strategic guidance to align network evolution with broader business goals, digital transformation initiatives and organizational change management.

2. **Managed enterprise connectivity solutions (DIA, VoIP and VPN)**

While many organizations are shifting toward cloud-first or cloud-only models, a significant proportion still rely on hybrid or traditional architectures. For these enterprises, core managed connectivity services remain crucial. MNS providers deliver:

- **Private and virtual networking:** Enterprises benefit from secure and customizable connectivity through dedicated internet access (DIA), VPN and voice over IP (VoIP) services.
- **Remote access and device management:** Providers enable distributed workforce operations through secure access solutions, device management platforms and robust authentication mechanisms.
- **Design and implementation:** Providers design and build tailored network architectures optimized for performance, security and scalability.
- **Configuration and monitoring:** Continuous oversight ensures optimal network settings, minimizes downtime and maintains service quality.
- **Bandwidth and UX:** Adequate bandwidth allocation and performance optimization ensure strong UX, which is critical for employee productivity and customer engagement.

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3. Network as a Service (NaaS)

NaaS represents one of the fastest-growing segments of the MNS market. This consumption-first model enables enterprises to access advanced networking capabilities without owning physical infrastructure or committing to long-term capital expenditures. It offers:

- **On-demand connectivity:** This includes flexible, scalable connectivity options that can be deployed rapidly to meet evolving business requirements.
- **Usage-based pricing:** Enterprises pay primarily for consumed resources, improving cost control and predictability.
- **Expert-led management:** Day-to-day network operations are handled by specialized teams, freeing internal IT resources to focus on strategic initiatives.
- **Cybersecurity and assurance:** NaaS offerings integrate cybersecurity, SOC (security operations center) services and cyber defense mechanisms to protect against evolving threats.
- **Multicloud integration:** Providers offer seamless coordination between multiple clouds, core networks and edge environments to enable agile and efficient application delivery.

MNS as an enabler of European enterprise competitiveness

The increasing relevance of MNS in Europe cannot be overstated. As ICT environments grow more complex and cyber threats intensify, the ability to rely on managed services for critical infrastructure becomes a strategic differentiator. MNS providers enable enterprises to:

- Maintain high network performance and reliability without continuously expanding internal teams
- Leverage advanced technologies, such as AI-driven analytics, SDN, zero-trust security and automation, without the need for extensive capital investment or specialized in-house expertise
- Ensure regulatory compliance and data sovereignty through well-defined processes and certified infrastructures that meet European legal standards
- Adapt rapidly to changing market conditions, such as scaling up operations during expansion phases or integrating new branch locations seamlessly into existing networks
- Focus on core business goals, product innovation and customer engagement while delegating the complex, resource-intensive aspects of network management to trusted partners

Moreover, MNS aligns well with emerging enterprise strategies around sustainability and energy efficiency. Managed service providers often optimize network resources through virtualization, dynamic capacity management and energy-efficient hardware, helping organizations reduce their carbon footprint.

Future outlook for MNS in Europe

The MNS market in Europe is poised for significant expansion between 2025 and 2030. Several factors driving this trajectory include:

- **AI and GenAI integration:** AI will increasingly automate network configuration, anomaly detection, threat response and performance optimization, further enhancing service efficiency and reliability.
- **5G and satellite connectivity growth:** The expansion of private 5G networks and the growing role of LEO satellites will drive demand for flexible, secure and scalable connectivity solutions.
- **Regulatory developments:** Continued emphasis on data sovereignty and cybersecurity will increase the need for compliant and well-managed infrastructures.
- **IoT and edge computing:** As edge deployments expand across industries, such as manufacturing, logistics, healthcare and energy, MNS providers will play a central role in orchestrating and securing these distributed environments.
- **Workforce and skills strategies:** With persistent IT skills shortages, enterprises will increasingly depend on external providers to fill critical gaps and access specialized expertise.

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The MNS market has evolved from a niche offering into a strategic enabler of digital transformation. Once resisted by many European enterprises that preferred in-house IT operations, MNS has now become indispensable in supporting hybrid work, ensuring security and compliance, and enabling agility in fast-changing markets.

By combining legacy support with next-generation network technologies, MNS providers deliver high-performance, resilient and secure infrastructures that underpin modern enterprise operations. As digital infrastructures continue to evolve and cyber threats become increasingly sophisticated, the role of MNS will only increase in both operational importance and strategic value.

Ultimately, enterprises that leverage MNS effectively will be better positioned to innovate, scale and compete in an increasingly connected and regulated global economy.

MNS delivers tailored next-generation network solutions that form a secure foundation for digital transformation. By adopting MNS, enterprises can upgrade their technologies, reduce IT capital costs, optimize workforce scaling and training, and minimize risks through continuous updates. This is especially critical for organizations transitioning to multicloud and NaaS, where MNS ensures smooth integration and reliable operations.

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Provider Positioning

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	Managed Network Services Evolution	Managed Enterprise Connectivity Solutions (DIA, VoIP & VPN)	Network as a Service (NaaS)
Accenture	Leader	Leader	Leader
Apcela	Not In	Not In	Market Challenger
AT&T	Product Challenger	Product Challenger	Product Challenger
Atos	Product Challenger	Not In	Not In
Bechtle	Product Challenger	Not In	Contender
Birlasoft	Contender	Not In	Not In
BT	Product Challenger	Product Challenger	Product Challenger
C2S Bouygues	Not In	Contender	Not In
Capgemini	Product Challenger	Leader	Product Challenger
Cognizant	Product Challenger	Not In	Product Challenger

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Provider Positioning

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	Managed Network Services Evolution	Managed Enterprise Connectivity Solutions (DIA, VoIP & VPN)	Network as a Service (NaaS)
Colt	Leader	Leader	Leader
Comcast Business	Leader	Leader	Product Challenger
Computacenter	Leader	Product Challenger	Rising Star ★
Damovo	Not In	Market Challenger	Not In
Deutsche Telekom	Leader	Leader	Leader
DXC Technology	Product Challenger	Rising Star ★	Leader
GTT	Leader	Leader	Leader
HCLTech	Leader	Product Challenger	Leader
Infosys	Contender	Not In	Product Challenger
Kyndryl	Product Challenger	Leader	Product Challenger

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Provider Positioning

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	Managed Network Services Evolution	Managed Enterprise Connectivity Solutions (DIA, VoIP & VPN)	Network as a Service (NaaS)
Logicalis	Not In	Contender	Not In
Microland	Not In	Not In	Product Challenger
Mphasis	Not In	Product Challenger	Not In
NTT DATA	Leader	Leader	Leader
Orange Business	Leader	Leader	Leader
PCCW Global	Market Challenger	Not In	Contender
RIEDEL Networks	Product Challenger	Product Challenger	Not In
SFR	Not In	Contender	Contender
Tata Communications	Product Challenger	Product Challenger	Product Challenger
TCS	Product Challenger	Product Challenger	Product Challenger

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Provider Positioning

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	Managed Network Services Evolution	Managed Enterprise Connectivity Solutions (DIA, VoIP & VPN)	Network as a Service (NaaS)
Tech Mahindra	Product Challenger	Product Challenger	Product Challenger
Telefonica	Product Challenger	Product Challenger	Product Challenger
Verizon Business	Leader	Market Challenger	Leader
Vodafone Business	Product Challenger	Product Challenger	Product Challenger
Wipro	Leader	Product Challenger	Leader
Zensar Technologies	Contender	Not In	Not In

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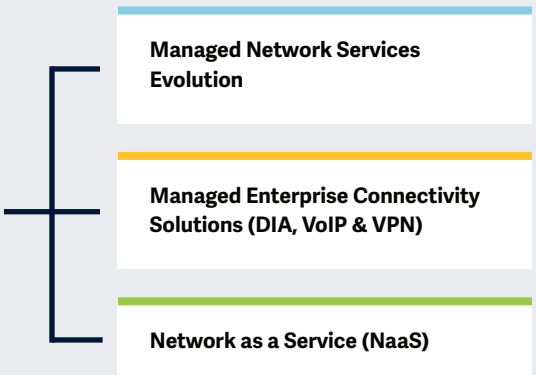
The report analyzes providers offering **MNS, managed DIA, VoIP or VPN networks, NaaS** solutions and consumption models.



Simplified Illustration Source: ISG 2025

Definition

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.

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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 service providers
- A differentiated positioning of providers by segments
- Focus on the regional 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).

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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.

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.

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.

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.

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Managed Network Services Evolution

Who Should Read This Section

This report is valuable for service providers offering **Managed Network Services Evolution** in Europe to understand their market position and for enterprises looking to evaluate these providers. It assesses providers' overall network vision and advisory capabilities, industry expertise, range of MNS offerings and ability to tailor their services to meet client-specific requirements.

Network professionals

Should read this report to gain insights into the latest managed service trends, technologies and best practices to design and implement scalable, resilient network infrastructures. It also explores strategies to enhance operational efficiency and future-proof networks against evolving digital demands. Additionally, the report highlights real-world use cases and actionable recommendations to help organizations stay competitive in a rapidly changing landscape.

CIOs, CTOs and other C-suite executives

Should read this report to gain insights into MNS for aligning technology with business goals, optimizing IT costs and enhancing operational efficiency. It also highlights strategies for driving innovation and improving service delivery, ensuring long-term competitiveness. Additionally, it provides actionable recommendations for future growth.

Cybersecurity professionals

Should read this report to understand how MNS can enhance their security posture, mitigate risks, comply with regulations and safeguard critical enterprise data and systems. It also explores proactive threat management strategies and best practices for resilience. Additionally, it offers insights into leveraging automation for faster incident response.

Procurement professionals

Should read this report to identify potential providers, compare pricing structures and understand contract nuances, enabling them to negotiate better terms and achieve cost savings. It also highlights vendor performance metrics and risk mitigation strategies. Additionally, it provides insights into optimizing procurement processes for long-term value.

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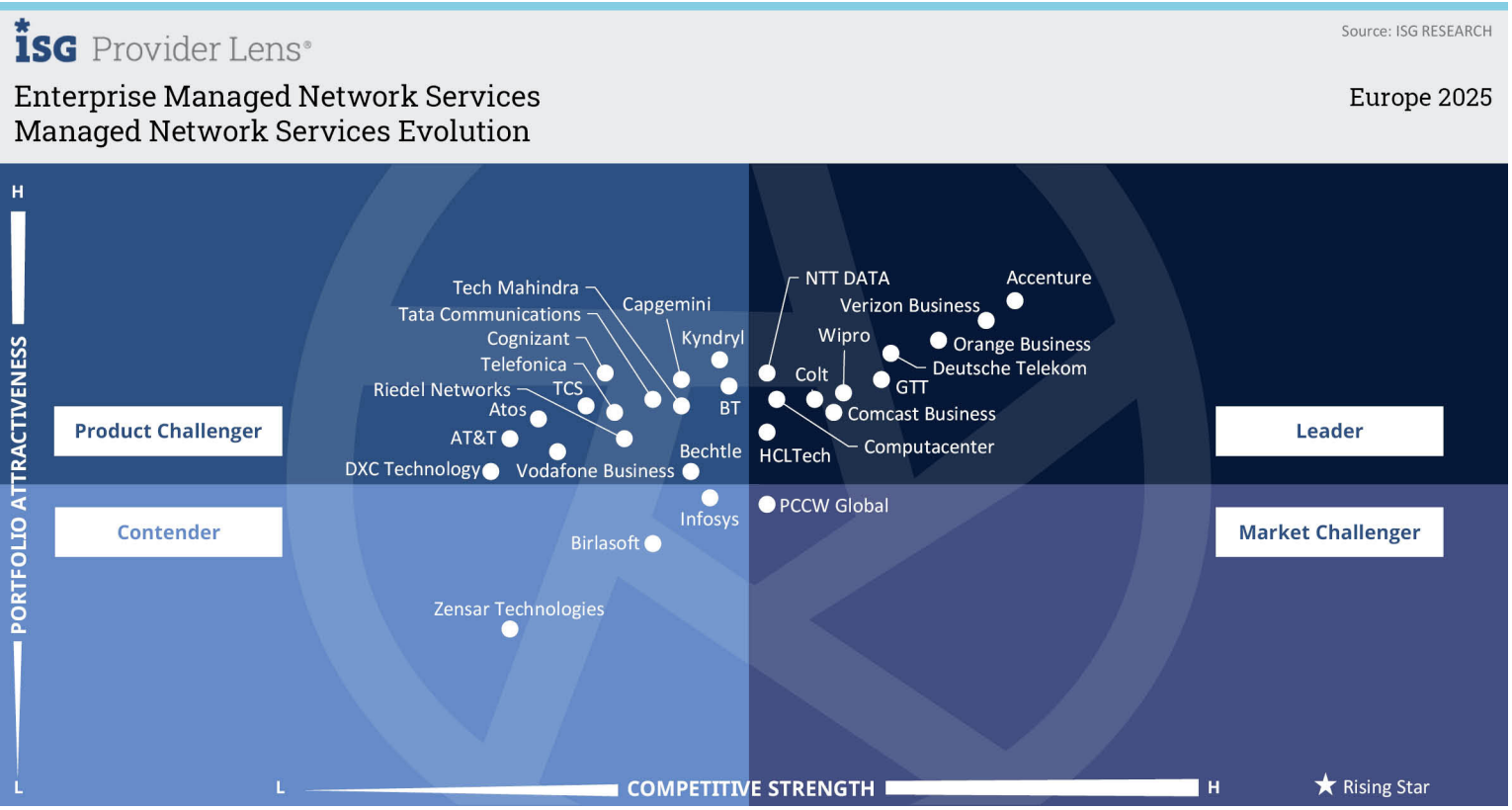

This quadrant assesses providers **delivering comprehensive managed network services**, integrating current technologies with **next-generation AI-driven capabilities**, to build **secure, adaptive networks** that meet and advance enterprise **business requirements.**

Dr. Kenn D Walters

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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**

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Observations

In line with global market dynamics, European enterprises are rapidly adopting MNS to achieve reliable connectivity and enhance operational efficiency. Providers now address a wide range of enterprise networking needs, covering multiprotocol label switching (MPLS), IP-based SD-WANs and SD-LANs, LEO and 5G links, managed WLANs, edge PoPs and advanced security layers. By doing so, they provide a holistic outsourced model that extends beyond connectivity to include strategic consulting, infrastructure deployment for fixed and mobile networks, resource optimization, upgrades and rollouts, remote monitoring, and critical functions such as cybersecurity, incident resolution, configuration control, update management and disaster recovery.

This broadened MNS scope underscores Europe's shift to fully or jointly outsourced arrangements, where providers manage hardware, software, transport services, spectrum and integrated tools as part of enterprise contracts.

The shift illustrates how organizations aim to simplify operations while modernizing networks into scalable, secure and future-ready systems. The rising adoption of AI-driven platforms, coupled with the proliferation of mobile, branch and edge devices, is amplifying network complexity and stretching in-house IT capacity — factors that are accelerating MNS adoption and fueling sustained market growth.

From the 36 companies assessed for this study, 29 qualified for this quadrant, with 11 being Leaders.

accenture

Accenture's MNS delivers a global, end-to-end solution to oversee and enhance enterprise network infrastructures. The offering prioritizes secure, resilient and scalable operations, allowing organizations to concentrate on driving business outcomes.

colt

Colt's MNS suite covers Tier 1 underlay, SD-WAN, cloud integration and management, end-to-end connectivity, CPE deployment and maintenance, advanced monitoring, strong security protocols, and integrated security service edge (SSE) and secure access service edge (SASE) functionalities.

COMCAST

Comcast Business' MNS framework supports business transformation through results-driven modernization and convergence across networking, cloud, connectivity and cybersecurity domains.

Computacenter

Computacenter addresses diverse networking needs with Managed SD-Campus for access, Managed SD-WAN for interconnection, Managed Secure Networking and SSE for protection, and Managed Data Center Networks for cloud and data-driven environments.

Deutsche Telekom's MNS portfolio drives customer digital transformation by expanding its software-defined everything (SDx) ecosystem, anchoring its Telco-as-a-Platform approach.

GTT

GTT delivers managed connectivity services as part of its enterprise portfolio, leveraging its global Tier 1 IP backbone to provide tailored solutions and seamless traffic transport across client locations worldwide.

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HCLTech advances its MNS practice with AI and GenAI innovations, a robust partner ecosystem and a commitment to continuous improvement and business value creation.

NTT DATA positions its SPEKTRA-powered MNS and NaaS as a unified portfolio for global enterprises, enabling modernization, transformation and future-ready, high-performance connectivity.

Orange Business enhances MNS through its Evolution Platform, offering two key advancements: cloud-style network and security delivery, and an open, innovation-friendly foundation that supports direct multivendor solution updates.

Verizon Business evolves its MNS capabilities with AI- and ML-driven tools, aligning with customer demands for secure, reliable, high-performing and agile network connectivity.

Wipro provides next-generation MNS by applying NetOps 2.0 and embedding AI and ML correlations into services and operations. Its flexible SLAs are designed collaboratively to align with client-specific business priorities.

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Leader

"Orange Business delivers flexible MNS through its Evolution Platform, offering customized networking, SD-WAN, multicloud and NaaS solutions with strong integration, performance and innovation capabilities."

Dr. Kenn D Walters

Orange Business

Overview

Orange Business is headquartered in Paris, France. It has more than 30,000 employees across 65 countries. In FY24, the company generated €7.8 billion in revenue, with IT & Integration Services as its largest segment. Orange Business positions its MNS portfolio within Digital Infrastructure together with the Evolution Platform, spanning consulting, integration and ongoing management. The platform enables cloud-like networking, multivendor integration and coinnovation with customers. Its capabilities extend across SDN, SD-WAN, multicloud and multinetwork integration, reinforced by a robust partner ecosystem and a growing NaaS focus.

Strengths

Platform-driven strategy for MNS transformation: Orange Business centers its strategy on Digital Infrastructure, introducing the Evolution Platform to deliver cloud-like networking and security. The platform integrates multivendor innovations and allows rapid access to the latest solutions. Its adaptive global SD-WAN provides fully virtualized, automated and centrally managed services, enabling on-demand scalability and performance. Security is built into the Evolution Platform, ensuring service chaining and robust monitoring across the MNS environment.

Provision of all delivery models: Orange Business offers multiple delivery models, including fully managed, comanaged and bespoke, allowing enterprises to align services with operational needs. Expert support teams, global monitoring tools and a strong partner ecosystem strengthen its delivery capability.

Orchestration and collaborative innovation: Orange Business' focus on flexible orchestration, automation and innovation—of its own and with partners and customers—ensures that enterprises achieve both performance and control. With its robust infrastructure and clear emphasis on collaborative innovation, the company stands as a key player in Europe's evolving MNS landscape.

Caution

Orange Business is undergoing a strategic transformation, but communicating the complexity of its platform-centric model may challenge some clients' understanding. Consistent and simplified messaging will be critical to maintaining clarity and reinforcing the company's continued market leadership.

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Managed Enterprise Connectivity Solutions (DIA, VoIP and VPN)

Who Should Read This Section

This report is valuable for service providers offering **Managed Enterprise Connectivity Solutions (DIA, VoIP and VPN)** in Europe to understand their market position and for enterprises looking to evaluate these providers. It assesses providers' overall network vision and advisory capabilities, industry expertise, range of MNS offerings and ability to tailor their services to meet client-specific requirements.

Network professionals

Should read this report to gain insights into implementing and optimizing DIA, VoIP and VPN services, as well as ensuring effective network performance. It also covers strategies for improving reliability and scalability. Additionally, it provides guidance on leveraging automation and monitoring tools for proactive issue resolution.

CIOs, CTOs and other C-suite executives

Should read this report to evaluate how managed connectivity solutions can enhance technological infrastructure and align with the overall business strategy. It also explores cost optimization opportunities and improved agility. Additionally, it provides actionable insights for driving innovation and ensuring long-term competitiveness.

Cybersecurity professionals

Should read this report to evaluate security protocols related to managed connectivity, identify potential vulnerabilities and ensure compliance with industry regulations. It also highlights best practices for threat detection and response. Additionally, it provides guidance on leveraging automation to strengthen overall security posture.

Procurement professionals

Should read this report to assess cost-effective solutions, negotiate contracts and understand the TCO associated with managed connectivity services. It also outlines vendor evaluation criteria and risk mitigation strategies. Additionally, it provides insights for optimizing procurement processes to maximize long-term value.

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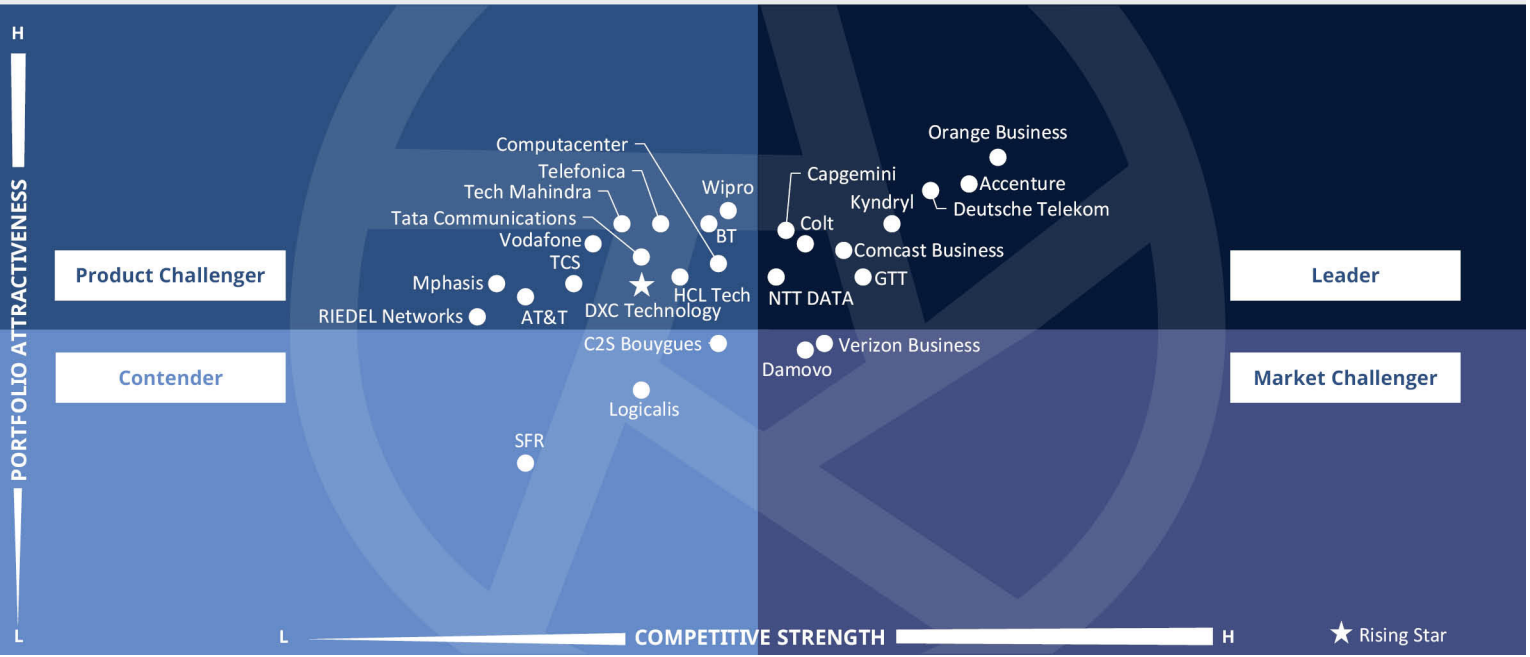
ISG Provider Lens®

Source: ISG RESEARCH

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

Europe 2025



This quadrant evaluates providers delivering **managed** services for enterprise **VPNs**, dedicated internet access **(DIA)** and **VoIP** management. These offerings may **include assuming control of current** systems and **modernizing them** for future readiness.

Dr. Kenn D Walters

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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

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Observations

Unlike the broad MNS or NaaS quadrants, which focus on wide-ranging market scale and multifunctional growth, this segment emphasizes fully managed enterprise DIA, VoIP and VPN solutions, which are often considered more private and non-cloud-connected in nature. Organizations are increasingly outsourcing these offerings, whether packaged or standalone, to ease internal workloads or to access capabilities existing teams cannot deliver without additional expertise.

DIA provides enterprises with a dedicated ISP connection, ensuring dependable, high-quality bandwidth without shared usage. This reliability is especially valuable for firms handling large-scale data or cloud-based workloads where secure, consistent access is mission-critical. VoIP, meanwhile, is gaining traction in targeted markets fueled by the rollout of high-speed broadband and 5G networks. These infrastructures provide the stability necessary for seamless voice and video communication, supporting unified communications strategies and expanded collaboration needs.

For industries with heightened compliance and security demands, such as finance or government, VPN and DIA solutions are becoming indispensable to guarantee secure, resilient and efficient connectivity.

From the 36 companies assessed for this study, 27 qualified for this quadrant, with 9 being Leaders and one rising star.

accenture

Accenture integrates VPN, DIA and VoIP as foundational elements of a secure (nonpublic MNS) ICT backbone. In line with its worldwide strategy, these services are implemented via the Accenture MNS organization.

Capgemini

Capgemini positions DIA, VPN and VoIP as vital parts of high-performing, secure infrastructures. The company's value lies in seamless integration, strong resiliency and embedded security features that set its offerings apart.

colt

Colt delivers DIA, VPN and VoIP with a focus on robust performance, global coverage and advanced management tools. SLAs reinforce dependable connectivity across enterprises.

COMCAST

Comcast Business leverages its extensive partner ecosystem and global service catalog to deliver enterprise solutions, including DIA, VPN and VoIP. These offerings are structured to address the scale and needs of large European enterprises.

Deutsche Telekom emphasizes DIA, VPN and VoIP as enablers of digital service transformation. The company continues to advance its Telco-as-a-Platform vision while expanding VPN capabilities and enhancing its Premium Internet Underlay (PIU).

GTT

GTT provides large enterprises with managed services such as DIA, VPN and VoIP. Advanced technologies and monitoring tools underpin these solutions to deliver performance, protection and consistency.

kyndryl

Kyndryl offers enterprise-grade networking services, including DIA, VPN and VoIP, as managed solutions. These offerings are designed for large-scale organizations that require dependable, secure and expandable connectivity.

NTT DATA

NTT DATA combines vast networking expertise with a broad asset base, including PoPs, data centers, a global IP backbone, P5G solutions and AI-enabled network management tools.

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Business

Orange Business delivers multiple service models such as fully managed, comanaged or customized. Hence, its VPN, DIA and VoIP solutions can be tailored to the operational and environmental needs of each customer.

DXC TECHNOLOGY

DXC Technology (Rising Star) delivers VPN, DIA and VoIP, reinforced by AI-driven operations, SDN and observability platforms. This combination ensures enterprises gain secure, scalable and high-performance infrastructures.

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Leader

"Orange Business supports enterprises with advisory-led VPN, DIA and VoIP transformations. By offering vendor-agnostic services and lifecycle management, it provides advanced solutions across Europe, aligning expertise with customer requirements."

Dr. Kenn D Walters

Orange Business

Overview

Orange Business is headquartered in Paris, France. It has more than 30,000 employees across 65 countries. In FY24, the company generated €7.8 billion in revenue, with IT & Integration Services as its largest segment. Orange Business provides advanced managed services, including VPN, DIA and VoIP, emphasizing advisory-led engagement. The company's methodology ensures seamless upgrades, migrations and takeovers, positioning it as a trusted partner for enterprises modernizing their networks. By combining vendor-agnostic solutions with strategic consulting and global reach, it delivers flexible and secure infrastructure tailored to digital business.

Strengths

Flexible delivery models: Orange Business supports fully managed, comanaged and customized models of delivery. These flexible approaches allow enterprises to adopt services according to internal capabilities, operational structures and specific compliance requirements. Monitoring and service management are integrated across all delivery models.

Vendor-agnostic approach: Orange Business acts as a solution aggregator, enabling customers to modernize operations by transitioning VPN and DIA environments with minimal disruption. Its end-to-end visibility, provided through single-pane-of-glass monitoring, strengthens control and simplifies the oversight of large-scale, global operations.

Advisory strength and expertise: Orange Business' advisory strength and integration expertise distinguish it as a capable provider for enterprises seeking flexible and globally consistent direct connectivity services. Its advisory services ensure the delivery of appropriate client-centric, tailored solutions.

Lifecycle management improvements: Orange Business manages the entire lifecycle of its networking services, including planning, staging, installation and ongoing oversight. Its Synergy methodology ensures project consistency, supported by program managers and delivery experts who coordinate technical and operational deployment.

Caution

Orange Business is shifting focus toward platforms, cloud, digitization and automation. However, this transition risks overshadowing its VPN, DIA and VoIP messaging. Clearer communication regarding ongoing investments in standalone services is necessary to reassure European enterprise clients.

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Network as a Service (NaaS)

Who Should Read This Section

This report is valuable for service providers offering **Network as a Service (NaaS)** in Europe to understand their market position and for enterprises looking to evaluate these providers. It assesses providers' overall network vision and service model capabilities, industry expertise, range of NaaS offerings and ability to tailor their services to meet client-specific requirements.

CIOs, CTOs 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. It also explores strategies for improving agility and accelerating digital transformation. Additionally, it provides actionable insights for aligning network services with business objectives.

Network professionals

Should read this report to gain insights on automation, network performance and security to make informed decisions about adopting NaaS for improved network resilience and flexibility. It also covers strategies for cost optimization and scalability. Additionally, it provides guidance on leveraging analytics for proactive issue resolution.

Procurement and vendor management professionals

Should read this report to understand the financial and operational benefits of NaaS when evaluating providers and selecting the right service models. It also highlights cost optimization strategies and risk management practices. Additionally, it offers insights into contract terms and performance benchmarks for long-term value.

Cybersecurity professionals

Should read this report to understand how NaaS can reduce vulnerabilities by centralizing network control, improving visibility and enabling quick deployment of security patches. It also explores advanced threat detection and compliance strategies. Additionally, it provides guidance on leveraging automation for faster incident response and stronger security posture.

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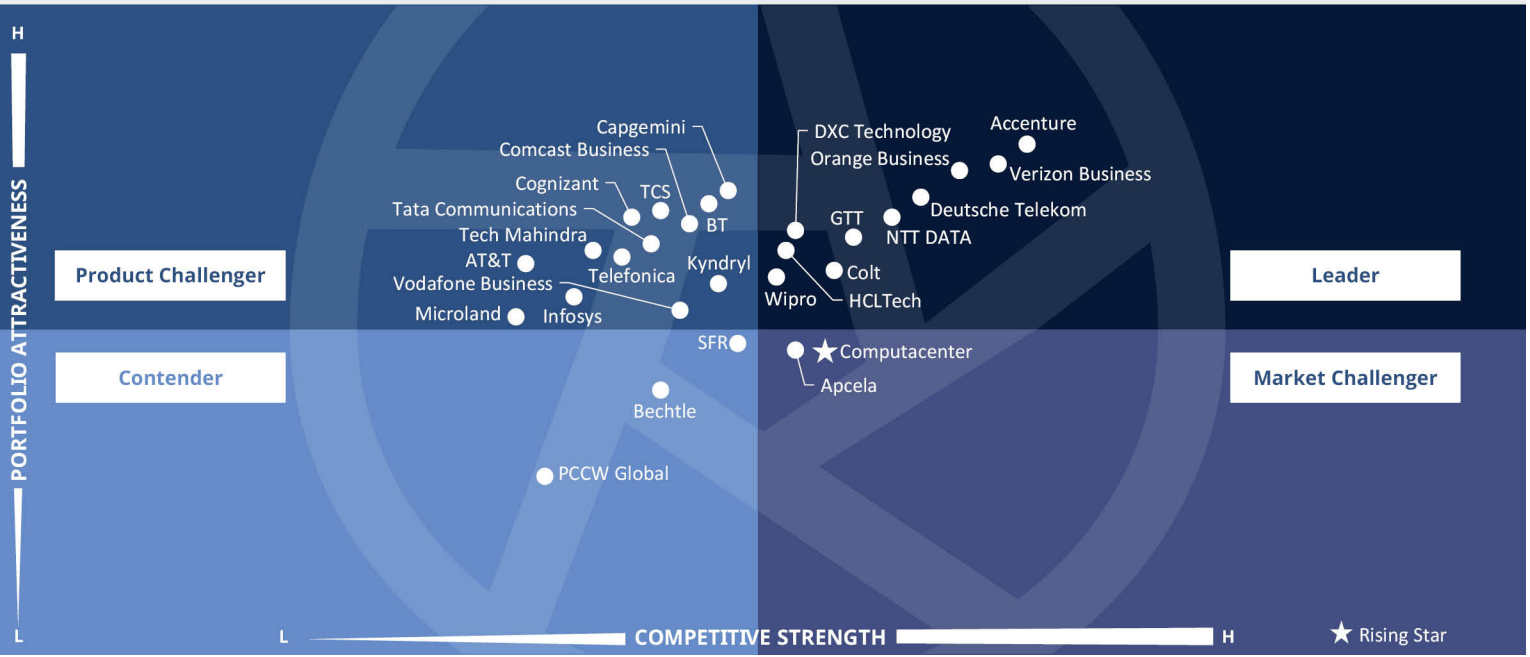
ISG Provider Lens®

Source: ISG RESEARCH

Enterprise Managed Network Services
Network as a Service (NaaS)

Europe 2025



This quadrant reviews NaaS providers, highlighting current innovations and **forward-looking solutions** that offer businesses stronger **advanced networking and higher security** via **adaptable pricing and usage models.**

Dr. Kenn D Walters

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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**

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Observations

The NaaS approach in Europe aligns seamlessly with global standards, reflecting a cloud-centric service model based on Metro Ethernet Forum (MEF) specifications. It allows enterprises, through MSPs, telecom operators, SIs and cloud providers, to access network capabilities on a subscription basis, integrating smoothly with existing commercial infrastructure across multiple regions. NaaS removes the burden of maintaining on-premises network infrastructure while fulfilling critical connectivity requirements.

The NaaS framework combines cloud-like agility with robust security solutions such as ZTNA, SASE and SSE, enabling modernized network and security outcomes. Its on-demand provisioning and centralized management make it highly adaptable to the evolving demands of AI-driven SaaS, cloud and edge computing. Distinguished by orchestration, automation, self-healing and dynamic service delivery, NaaS differs significantly from conventional managed services. Also referred to as network-on-demand (NoD), it operates on pay-as-you-go or fully flexible consumption models, addressing enterprise needs without heavy investment in hardware or personnel.

NaaS offers bespoke advantages aligned with today's digital and operational priorities. It delivers resilient, secure and efficient networking, ensures high-performance connectivity with flexibility and supports scalable growth under a usage-based pricing structure.

From the 36 companies assessed for this study, 28 qualified for this quadrant, with 10 being Leaders and one rising star.

accenture

Accenture's NaaS simplifies traditional network management by abstracting its complexity. This approach enables organizations to consume agile, scalable and cost-efficient services, while Accenture manages the underlying operational intricacies.

colt

Colt capitalizes on the global Colt IQ Network to provide direct fiber access to more than 230 cloud on-ramps. Its NaaS solutions include Ethernet, MPLS, internet, SD-WAN, IP VPN and wavelength services, offering enterprises flexible and high-performance connectivity.

Deutsche Telekom continues expanding its SDx-driven automation ecosystem, reinforcing the Telco-as-a-Platform vision. With NaaS at its core, the company delivers adaptable, secure and scalable services that support enterprise transformation journeys across industries.

DXC TECHNOLOGY

DXC Technology combines broad digital transformation expertise with modernized MNS and NaaS. By integrating multiple disciplines, it helps clients address evolving business challenges and invest consistently in enhancing DXC MNS and NaaS capabilities.

GTT

GTT adapts its NaaS solutions to the specific needs of European enterprises while maintaining global consistency. Its offerings blend proprietary and partner-delivered solutions, supported by end-to-end visibility and monitoring through the EnvisionDX portal.

HCLTech

HCLTech delivers end-to-end services encompassing strategy, consulting, architecture, integration and NaaS deployment. The company also designs tailored ZTNA strategies, aligning seamlessly with existing IT environments to improve security and business agility.

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NTT DATA presents its SPEKTRA-powered MNS and NaaS portfolio as a global platform of network and transformation services. This comprehensive suite enables enterprises to achieve high-performance, scalable and future-ready networks designed for resilience.

Orange Business provides a diverse portfolio of managed, comanaged and customized operational models. Its NaaS framework allows enterprises to transition from conventional service provider arrangements to flexible, modern and consumption-based network services.

Verizon Business offers NaaS solutions as managed services that accelerate enterprise modernization. These services help build resilient, agile and cloud-centric infrastructures, supporting distributed operations while enabling rapid ICT transformation and long-term scalability.

Wipro, in partnership with Verizon and others, delivers NaaS solutions on a subscription model. Featuring certified, preconfigured designs and validated service chains, the platform boosts performance, strengthens trust and improves CX for differentiation.

Computacenter (Rising Star) can offer many SD campus NaaS solutions, either incorporating vendor solutions from Cisco and HPE or as a completely independent Computacenter solution. These solutions are also expanding into data centers.

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Leader

"Orange Business provides advanced NaaS via its Evolution Platform, enabling enterprises to access flexible, secure and tailored network and security services aligned to their specific requirements."

Dr. Kenn D Walters

Orange Business

Overview

Orange Business is headquartered in Paris, France. It has more than 30,000 employees across 65 countries. In FY24, the company generated €7.8 billion in revenue, with IT & Integration Services as its largest segment. By leveraging its robust MNS portfolio, Orange Business offers NaaS through its Evolution Platform that integrates consulting, design and managed services. This platform-driven approach allows enterprises to adopt flexible consumption models while benefiting from coinnovation, ecosystem partnerships and strong expertise in integration and security services.

Strengths

Strategic value propositions: Orange Business aligns its solutions with customer needs through strategic value propositions (SVPs), especially within networking and digital infrastructure. Key innovations include cloud-like delivery of network and security services and a platform approach that gives enterprises early access to multivendor advancements and innovation ecosystems, providing direct access to the latest multivendor releases.

Flexible consumption and service models: Orange Business offers a range of delivery and operational models, including fully managed, comanaged and customized solutions tailored to customers' unique environments. This comprehensive portfolio helps transition from the traditional service provider model to an SD-network transformation, independent of the underlay network and delivered as a service to enable NaaS.

Secure, automated network services: Orange Business' Evolution Platform is designed to deliver highly reliable, secure networking services. It incorporates advanced service chaining, automation and monitoring to support mission-critical workloads, while extending NaaS capabilities across diverse enterprise environments.

Caution

As Orange Business expands its platforms, automation and cloud-based offerings, maintaining clear communication of evolving capabilities is a challenge. Ensuring clients fully understand the benefits and uniqueness of the Evolution Platform in MNS or NaaS modes should remain a top priority.

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Appendix

The ISG Provider Lens® 2025 – Enterprise Managed Network Services study analyzes the relevant software vendors/service providers in the Europe 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 report includes research 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. The data collected for this report represent information that ISG believes to be current as of November for providers that actively participated and for providers that did not. ISG recognizes that many mergers and acquisitions may have occurred since then, but this report does not reflect these changes.

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

The study was conducted in 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 and use cases
4. Leverage ISG's internal databases and advisor knowledge & experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts & figures received from providers and other sources.
6. Use of the following key evaluation criteria:
   * Strategy and vision
   * Innovation
   * Brand awareness and presence in the market
   * Sales and partner landscape
   * Breadth and depth of portfolio of services offered
   * Technology advancements

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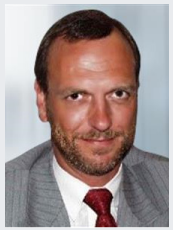
Lead Analyst and Author

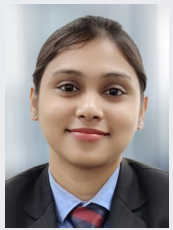


Dr. Kenn D Walters

Distinguished Lead Analyst

Dr. Kenn Walters is a highly skilled senior executive with more than 40 years of experience in directing and managing major transformational technology projects, R&D programs, as well as extensive experience within providers and in global industry research and executive advisory. For ISG, Kenn has written more than 100 articles for ISG Insights, covering 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 ISG Provider Lens® reports (https://isg-one.com/research/isg-provider-lens) in areas such 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 Analysts



Shatakshi Singh

Senior Research Analyst

Shatakshi Singh is a Research Analyst at ISG and is responsible for supporting Provider Lens studies on Telecommunication, Media and Entertainment Services , Networking – Software defined Solutions and Services and Enterprise Managed Network Services. She works closely with the Lead author from diverse regions in the research process. She also authors global summary reports. Prior to this role, she has completed her masters i.e. MBA from Amity Business School, Amity University Noida.

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Study Sponsor

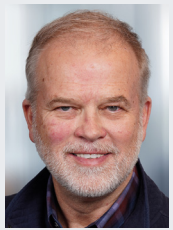
Heiko Henkes

Managing Director

Heiko Henkes serves as a Managing Director at ISG, overseeing the Global ISG Provider Lens™ (IPL) Program for all IT Outsourcing (ITO) studies alongside his pivotal role in the global IPL division as a strategic program manager and thought leader for IPL lead analysts. 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 known for his contributions as a keynote speaker on digital innovation, sharing insights on using 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 partner 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.

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ISG Provider Lens®

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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.

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ISG Provider Lens®

DECEMBER, 2025

REPORT: ENTERPRISE MANAGED NETWORK SERVICES

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