

Enterprise Managed Network Services

A detailed study of the enterprise
managed network services market



Introduction	03	Contacts for this Study	14
About the Study		Advisor Involvement	
Quadrants Research	05	Advisor Involvement –	
Definition	06	Program Description	15
Quadrants by Regions	10	Advisory Team	15
Schedule	11		
Client Feedback Nominations	12	Invited Companies	16
Methodology & Team	13	About our Company & Research	18

Enterprise networks have become the operational backbone of digital business. As applications, users, data and workloads extend across branches, campuses, clouds, edge locations and data centers, enterprises require network services that deliver security, resilience, observability and agility. Managed network services have evolved beyond traditional connectivity operations to service models combining transformation, lifecycle management, automation, cloud connectivity and experience assurance.







The ISG Provider Lens® Enterprise Managed Network Services 2026 study evaluates how providers help enterprises plan, operate and modernize network environments via three connected sourcing models, namely, consulting-led transformation, managed network operations and network as a service (NaaS). The study also assesses managed enterprise connectivity services in India, reflecting the demand for resilient last-mile delivery, regulated-sector readiness, sovereign connectivity, and cloud and colocation ecosystems.

This study complements the ISG Provider Lens® Network - Software-Defined Solutions and Services study. While the latter focuses on software-defined technologies, platforms and underlay modernization, this study evaluates providers' ability to deliver service outcomes through operating models, service assurance, SLA governance, application experience, security integration and automation.

Enterprise buyers seek partners that can bridge legacy networks and modern architectures while supporting hybrid work, multicloud environments, edge use cases, AI-ready workloads and flexible consumption models. This study evaluates providers on their ability to improve resilience, visibility, agility and business alignment.

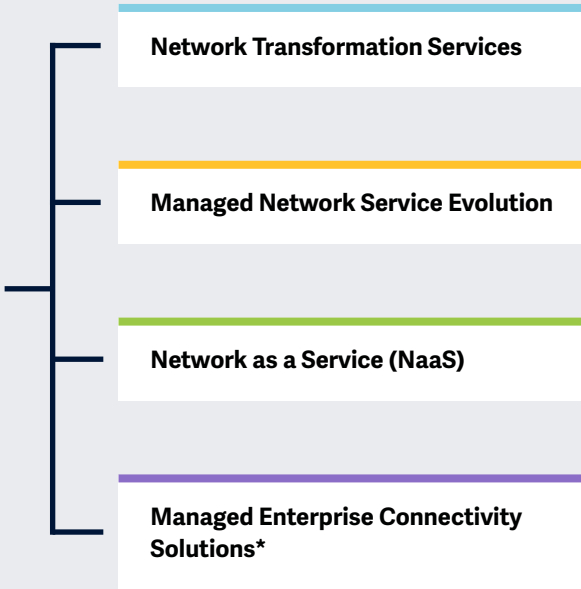


Enterprise Managed Network Services 2026 – Coverage Overview

Anchors and Key Drivers	2026 Quadrants	Services	Components/Tools
 Innovation IP – accelerators in Data, AI Sandboxes, Cloud, etc.	Network Transformation Services	Advisory/consulting/transformation	MPLS, IP/VPN, LEO SAT, Ethernet, cloud/DC, wireless SD-networks connectors / accelerators for advisory
 Security & GRC Data – System		Provisioning/installation/upgrading with third-party vendor systems	LAN/WLAN, SD-LAN & WAN/SD-WAN
	 Agile, DevSecOps, NetOps, & SRE Frameworks Standards as Code, Zero Trust Security, Digital Tech and Architectural Convergence	Managed Network Service Evolution	Automated operations support (incl. routing, pattern analysis)
Fault diagnosis, recovery, configuration management, BC, security, SLA checks			Branch, Edge PoPs and related orchestration tools
 Enterprise Value Management ESG, Strategy, Data/Devices Management, Multi-access, Multi-vendor, multicloud, Sovereignty, IT/OT convergence	Network-as-a-Service (NaaS)	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 and standard interfaces
 Management and Deployment Compliance, Patch, SLA and Configuration, Performance Management, AIOps, Service Automation	Managed Enterprise Connectivity Solutions – India only	Adaptable business services (flexible consumption models)	Cloud-based service management and delivery frameworks
		App/services performance (latency, jitter and packet loss, etc.)	Monitoring and reporting with differentiated AI, ITSM and CX tools
 Competency & Talent 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



This report evaluates providers of network transformation services, MNS evolution, NaaS and **managed enterprise connectivity solutions**.



Simplified Illustration Source: ISG 2026

*Covered for India only

The ISG Provider Lens® Enterprise Managed Network Services 2026 study offers the following to business and IT decision makers:

- Transparency on the strengths and weaknesses of relevant providers.
- A differentiated positioning of providers by segments on their competitive strengths and portfolio attractiveness.

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



Network Transformation Services

Definition

This quadrant assesses providers of consulting-led enterprise network transformation services for organizations modernizing, restructuring or outsourcing their managed network environments. Providers support clients throughout the network transformation lifecycle, including current-state assessment, target architecture design, business case development, migration planning, solution validation, rollout governance and operating model design.

The scope includes transformation programs for WAN, LAN, WLAN, SD-WAN, SASE, cloud and edge connectivity, NaaS readiness, automation, AIOps-enabled operations, zero-trust integration and compliance-driven modernization. Providers must translate business, security, application and cloud requirements into actionable network transformation roadmaps.

As enterprises modernize distributed, hybrid and regulated environments, they seek providers that reduce complexity, coordinate ecosystems, mitigate migration risk and align network transformation objectives.

Eligibility Criteria

1. Offer a structured portfolio of **network transformation services**, including assessment, target architecture design, roadmap development, migration planning and transformation governance
2. Cover relevant **enterprise networking domains**, such as WAN, LAN, WLAN, SD-WAN, SASE, cloud connectivity, edge networking and network automation
3. Provide **capabilities to design future managed network operating models**, including governance, service integration, performance management and continuous improvement
4. Support **network architecture modernization for cloud, edge and distributed enterprise environments**, including hybrid work, multicloud connectivity and branch transformation
5. Meet **application- and experience-centric** network requirements, and **business-aligned performance** metrics
6. Deliver **planning capabilities for AI-ready and data-intensive network environments**, such as capacity, latency, throughput, resilience and workload-specific traffic patterns
7. Support **transformation scenarios** involving OT/IT convergence, industrial IoT, private mobile networks or other low-latency edge use cases, where relevant
8. Advise on **flexible network consumption and commercial models**, such as NaaS, network FinOps and usage-aligned capacity planning



Managed Network Service Evolution

Definition

This quadrant assesses providers delivering fully managed, enterprise-grade network services through long-term outsourcing engagements.

These providers assume end-to-end responsibility for enterprise network environments across core, distributed and cloud infrastructure, using AI-assisted operations, automation, predictive analytics, self-healing capabilities, zero trust security and operational transformation.

The scope includes managed WAN, LAN and WLAN services, multiprotocol label switching (MPLS) and IP networking, branch connectivity, edge, firewalls and network security. Services span the full lifecycle from consulting and provisioning to monitoring, and continuous improvement delivered through SLA-based models.

In 2026, MNS providers are expected to embed AI-driven automation, zero trust-aligned sovereign operations, cross-vendor observability, self-healing workflows, sustainability and real-time performance management to support resilient, secure and future-ready enterprises.

Eligibility Criteria

1. Offer a **comprehensive portfolio of managed network services**, including connectivity, security and edge networking
2. Deliver end-to-end lifecycle services spanning **planning, implementation, operations, modernization and support** for fixed and mobile enterprise networks
3. Provide **integrated management platforms** with unified dashboards, enabling **centralized monitoring**, SLA tracking, policy enforcement, **sustainability** and performance analytics
4. **Operate and orchestrate hybrid and distributed enterprise networks**, ensuring **modularity and scalability**
5. Maintain a **mature partner ecosystem for seamless service integration**
6. **Embed AIOps, automation, predictive analytics, event correlation, automated root cause analysis (RCA), self-healing workflows and cross-domain observability**
7. **Have a minimum number of enterprise managed network customers** supported through legacy modernization and transition with minimal disruption, including branch/site rollout, service migration, compliance, device refresh and operating model change
8. **Provide dedicated NOC and SOC capabilities**
9. Demonstrate **readiness for regulated industries** through security controls, compliance reporting, resilience design, data sovereignty support, zero trust alignment and audit evidence
10. Support commercial regional or country-specific contracts through **modular managed services, co-managed options, consumption-based and NaaS models, outcome-linked SLAs and transparent pricing.**



Definition

This quadrant assesses providers offering cloud-native NaaS solutions for enterprise customers. These solutions deliver on-demand, consumption-based capabilities that reduce the need for enterprises to own and manage network infrastructure while enhancing agility, scalability and efficiency.

Aligned with the MEF's NaaS principles, these solutions integrate networking and security services through centralized management, automated provisioning and end-to-end orchestration. Providers enable interoperability with existing environments via standardized APIs, automation, observability and policy-based control.

Emphasis is on programmability, self-healing, autoconfiguration, fast service activation, multicloud and multivendor integration, and adaptive orchestration to support dynamic workloads, regulatory requirements and evolving architectures. Increasingly, providers incorporate sustainable and sovereign capabilities, including carbon-aware routing and integration with sovereign clouds.

Eligibility Criteria

1. Offer a **broad and integrated portfolio of NaaS solutions** spanning connectivity, security, orchestration and lifecycle management
2. Provide a modular service catalog that enables enterprises to select, activate, scale, modify and retire network services through standardized bundles, self-service workflows
3. **Demonstrate consistent SLA adherence** across service performance, orchestration reliability and CX metrics
4. Provide **centralized orchestration platforms** (single pane of glass) supporting **self-service (portal) management, real-time analytics** and **unified reporting**
5. **Have proven experience in deploying and managing** scalable, cloud-native services, including integration of AI-driven tools and policy automation (with industry-specific use cases)
6. Enable **integration and provisioning across multivendor and multicloud environments** through open APIs and programmable interfaces
7. Maintain **frequent service updates and enhancements** with minimal disruption. Provide AI- and AIOps-enabled service assurance, predictive analytics, automated remediation, capacity optimization and self-healing capabilities, where applicable
8. Provide documented success through **large-scale reference deployments** across industries and geographies, supported by a substantial client base
9. Support **sovereign cloud options, sustainability-linked functions** such as carbon-aware routing and **flexible provisioning models**.



Managed Enterprise Connectivity Solutions*

Definition

This quadrant evaluates providers delivering managed enterprise connectivity services in India, including dedicated internet access (DIA), Ethernet, VPN, Session Initiation Protocol (SIP) and voice over IP (VoIP), cloud connectivity, unified communications (UC), contact-center connectivity and inter-data-center connectivity. Providers assume end-to-end accountability across planning, provisioning, operations and service assurance for various environments.

The quadrant emphasizes resilient last-mile delivery, multi-carrier coordination, readiness for regulated sectors, local data handling and sovereign connectivity requirements. Relevant capabilities include cloud and colocation connectivity, public switched telephone network (PSTN)/SIP integration, secure enterprise voice, application-aware performance management and AI- and AIOps-enabled assurance.

In a managed network or NaaS model, providers must deliver services directly while maintaining clear accountability for outcomes.

*Covered for India only

Eligibility Criteria

1. Offer managed enterprise connectivity services in India, such as **DIA, Ethernet, VPN, SIP/ VoIP, cloud connectivity, SDWAN, inter-data-center connectivity or UC/contact-center connectivity**
2. Provide lifecycle capabilities spanning **planning, design, provisioning, migration, operation and support across branch, campus, data center, cloud and contact center environments with partners**
3. Support resilient pan-India connectivity, including **last-mile coordination and diversity, multi-carrier integration, field support, 4G/5G backup, NOC and local service desk capabilities, and multi-site management and governance**
4. Include **measurable service assurance** for availability, restoration, packet performance, voice quality, activation timelines, change governance and application experience
5. Provide **secure network infrastructure services**, including DNS, DHCP, IPAM, secure SIP, DDoS protection, route security and integration
6. Meet **Indian regulatory, sovereignty and data-handling** needs through local hosting or processing options, auditability, encryption and regulated-sector controls
7. **Support cloud, colocation and data center ecosystems** through direct cloud connect, cloud exchanges, interconnect fabrics, NaaS platforms or equivalent models
8. Provide **modern service assurance and commercial flexibility** through AI- and AIOps-enabled monitoring, customer portals, SLA reporting, flexible pricing and bundled or consumption-based options



Quadrants by Regions

As a part of this ISG Provider Lens® quadrant study, we are introducing the following four quadrants on Enterprise Managed Network Services 2026:

Quadrant	U.S.	Europe	APAC
Network Transformation Services	✓	✓	
Managed Network Service Evolution	✓	✓	✓
Network as a Service (NaaS)	✓	✓	✓
Managed Enterprise Connectivity Solutions*			✓

***Covered for India only**



The research phase falls in the period between July and August 2026, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in December 2026.

Milestones	Beginning	End
Survey Launch	July 7, 2026	
Survey Phase	July 7, 2026	August 6, 2026
Sneak Preview	October 2026	November 2026
Press Release & Publication	December 2026	

Please refer to the [ISG Provider Lens® 2026 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 Enterprise Managed Network Services 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 2026. 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



ISG Star of Excellence



The ISG Provider Lens® 2026 – 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.

Study Sponsor:

Heiko Henkes

Lead Analysts:

Kenn Walters and Yash Jethani Pradeep

Research Analyst:

Mamtha R

Data Analyst:

Sri Vathsya Upadyaya

Project Manager:

Priyanka A

Information Services Group Inc. is solely responsible for the content of this report. Unless otherwise cited, all content, including illustrations, research, conclusions, assertions and positions contained in this report were developed by, and are the sole property of Information Services Group Inc.

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.



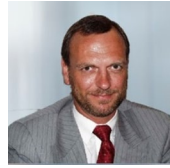
Contacts For This Study

Study Sponsor



Heiko
Henkes

Director and
Principal Analyst



Kenn Walters

Overall Lead and
Principal Analyst –
Europe, U.S.



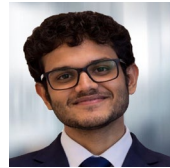
Yash Jethani Pradeep

Senior Manager
and Principal
Analyst, APAC



Mamtha R

Research
Specialist



Sri Vathsa
Upadyaya

Data
Analyst



Priyanka A

Project
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 consultant advisors participate as part of each study's quality and consistency review process.

The consultant advisors ensure 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 consultant advisors' group and contribute at different levels depending on their availability and expertise.

The consultant 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



Leon
Platts

**Partner and
President**



Jon
Harrod

Partner



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.

* Rated in previous iteration

Accenture*	Capgemini*	DXC Technology*	Megaport*
Adani Group	Coforge	Equinix	Microland*
AdaniConneX	Cognizant*	ESDS	Mphasis*
Airtel Business	Colt*	Fujitsu*	NTT Communications
Akamai	Comcast Business*	GPX India	NTT Data*
Alkira Networks	Computacenter*	GTT*	Nxtra
Apcela*	Console Connect	HCLTech*	Optus*
AppEx Networks*	Converge ICT Solutions*	HFCL*	Orange Business*
Aryaka*	Crown Castle*	Infosys*	PCCW Global*
AT&T*	CtrlS	Interactive*	Persistent Systems*
Atos*	Cyient	Invenia	Red River Technology*
Axiata*	Damovo*	Kyndryl*	Reliance Jio
Bechtel*	Data#3*	Lightstorm*	Riedel Networks*
Birlasoft*	Deutsche Telekom*	Logicalis*	SFR*
BT*	Digital Realty	Lumen Technologies*	Sify Technologies



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.

* Rated in previous iteration

Singtel*	VNPT*
SK Telecom*	Vocus*
Sparkle	Vodafone Business*
Starhub*	Wipro*
STT GDC India	Yotta Technologies
Tata Communications*	Zensar Technologies*
TCS*	
Tech Mahindra*	
Telefonica*	
Telekom Malaysia*	
Telkom Indonesia*	
Telstra*	
UST*	
Ventia*	
Verizon Business*	



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](#).

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.

ISG offers research specifically about providers to state and local governments (including counties, cities) as well as higher education institutions. Visit: [Public Sector](#).

For more information about ISG Research™ subscriptions, please email contact@isg-one.com, call +1.203.454.3900, or visit research.isg-one.com.

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.





JULY, 2026

BROCHURE: ENTERPRISE MANAGED NETWORK SERVICES