iSG Provider Lens™

Managed Network Services 2024

A detailed study of the Managed Network Services market

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

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

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

Managed Network Services 2024 – Coverage Overview

Anchors & Key Drivers	2024 Quadrants	Services	Components/Tools
Innovation IP – accelerators in Data, AI Sandboxes, Cloud, etc.	**Managed Network Services**	Advisory/Consulting	MPLS, IP/VPN, IPLC, Ethernet, SD–Networks, Cloud/DC Connect
		Provisioning/Installation/Upgrading	LAN/WLAN & WAN/SD–WAN
Security & GRC Data – System		Operations Monitoring/Support (incl. routing, pattern analysis)	Firewalls/Security tooling
Agile, devSecOps, NetOps, & SRE Frameworks Standards as Code, Zero Trust Security, Digital Tech Convergence		Fault Diagnosis, Recovery, Configuration Management, BC, SLA checks	Branch, Edge PoPs and related tools
	Managed (DIA, VoIP AND/OR VPN)	App performance	Monitoring & reporting
Enterprise Value Management ESG, Strategy, Data/Devices Management, Multi-access, IT–OT		Security (IDS/IPS), encryption, compliance services	VoIP/Video over IP
		Implementation supply upgrade	Fault Diagnosis, Recovery, Configuration Management tools
Management and Deployment Compliance, patch, SLA and configuration, performance management	**Network-as-a-Service**	N/w orchestration (Auto-config/self-healing, AIOps, ML optimization)	Hosted SDWAN/SASE, DC-as-a-service tools/frameworks
		ZTNA	DR tools/frameworks/standard interfaces
Competency & Talent Resources – certifications		Adaptable business services (flexible consumption models)	Cloud-based service management & delivery frameworks

The report is
an analysis of
providers offering
MNS, managed
private networks
and NaaS
solutions.
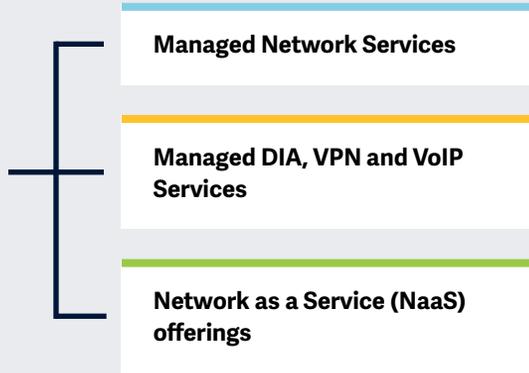
Simplified Illustration Source: ISG 2024

Managed Network Services

Managed DIA, VPN and VoIP Services

Network as a Service (NaaS) offerings

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

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

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

Managed Network Services

Definition

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

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

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

Eligibility Criteria

1. Have a wide scope of products/services in the **MNS portfolio**

2. **Plan, deliver, implement and support** hardware and software aspects of a hybrid network

3. **Have a partner ecosystem** of leading providers, vetted to assist with overall delivery

4. **Effectively replace/upgrade** outdated network components, as required, to deliver **efficient, streamlined and reliable networks**

5. Offer simplified operations and management for clients through a **single pane of glass**

6. **Manage** and meet all SLAs of an enterprise network

7. **Have proven capability** to seamlessly implement and commercially deploy MNS, at scale, across industries

8. **Undertake comprehensive updates and apply the same to** networks with the needed frequency

9. Show a significant **volume of reference customers/site deployments**

10. **Competitive** in terms of offerings and commercials terms, **including guarantees on SLAs**

Managed DIA, VPN and VoIP Services

Definition

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

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

VoIP is witnessing significant growth, with the availability of high-speed broadband connections and 5G networks offering stable connections that allow seamless VoIP calls and high-quality video conferences.

The increasing popularity of managed and third-party hosted VoIP solutions is playing a significant role in driving market growth, particularly with demand from businesses seeking flexible options.

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

Eligibility Criteria

1. **Offer a wide portfolio of comprehensive solutions covering various** areas

2. Ability to **plan, deliver, implement and support** all hardware and software aspects of networks with standardized services and proprietary network transport

3. **Successfully operate and manage** all SLAs regarding an enterprise network

4. **Proven capability** in seamless implementation and commercial deployment at the required scale

5. **Undertake comprehensive updates and apply the same** to networks with the needed frequency

6. Show a **significant volume of reference customer/site deployments**

7. **Competitive** in terms of offerings and commercial terms

Network as a Service (NaaS) Offerings

Definition

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

NaaS is a cloud-based service model, based in large part on the MEF model where clients can rent networking services from providers, typically MSPs, telecoms operators or cloud providers. With NaaS, enterprises can meet their networking requirements without the need to have related staff to maintain the networking infrastructure. NaaS combines flexible cloud computing with modern security models such as zero trust network access (ZTNA) to deliver advanced and updated network and security solutions to enterprises.

NaaS can be rapidly deployed or removed, on demand, using centralized management tools. Standardized interfaces ensure compatibility with existing solutions.

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

Eligibility Criteria

1. **Offer a wide portfolio of comprehensive solutions covering** various areas

2. **Successfully** meet all SLAs of an enterprise network

3. Offer simplified operations and management for clients through a **single pane of glass**

4. **Have proven capabilities** in deploying and managing cloud-based services and the delivery of tools/frameworks integrated with AI

5. **Have an understanding of the market** and the evolution and contributions of technologies, together with **industry-specific expertise and experience**

6. **Ability to leverage a wide range of partnerships** and management capabilities involving disparate providers and solutions for a customer

7. **Undertake comprehensive updates and** apply the same to networks with the needed frequency

8. **Show a significant volume of reference customer/site** deployments

9. **Competitive** in terms of offerings and commercial terms

Quadrants by Region

As part of this ISG Provider Lens™ quadrant 2024 study, we are introducing the following three quadrants on Managed Network Services.

Quadrant	Europe	U.S.	APAC*
Managed Network Services	✔	✔	✔
Managed DIA, VPN and VoIP Services	✔	✔	✔
Network as a Service (NaaS) Offerings	✔	✔	✔

*APAC includes India, Australia/New Zealand, Singapore, Malaysia, Indonesia, Thailand, Vietnam and the Philippines and excludes Japan, South Korea, Taiwan and China.

The research phase falls in the period between June and September 2024, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in December 2024.

Milestones

Milestones	Beginning	End
Survey Launch	June 26, 2024	
Survey Phase	June 26, 2024	August 9, 2024
Sneak Previews	Oct 2024	
Press Release & Publication	Dec 2024	

Please refer to the link to view/download the ISG Provider Lens™ 2024 research agenda

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!

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:
ISG.star@isg-one.com

ISG Star of Excellence

Methodology & Team

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

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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 services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of June 2024, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

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

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Abhilash M V

Global 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 advisors participate as part of each study's quality and consistency review team (QCRT). The QCRT ensures each study reflects ISG advisors' experience in the field, which complements the primary and secondary research the analysts conduct. ISG advisors participate in each study as part of the QCRT group and contribute at different levels depending on their availability and expertise.

The QCRT advisors:

- Help define and validate quadrants and questionnaires,

- Advise on service provider inclusion, participate in briefing calls,

- Give their perspectives on service provider ratings and review report drafts.

ISG Advisors to this study

Margot
Wall

**Principal
Consultant**

Liam
Chin

**Principal
Consultant**

Invited Companies

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

Accenture	BlueAlly	Computacenter	Externetworks
AIS (Thailand)	Bouygues SFR	Controlware	Extreme Networks
Alcatel-Lucent Enterprise	BT	Converge ICT Solutions (Philippines)	Frontier
Apcela	Cable & Wireless Communications	Converged Communications	Fujitsu Limited
Appex Network	Cambium Networks	ConvergeOne	GAVS Technologies
Aryaka	CANCOM	Crown Castle	Globalgig
AT&T	Capgemini	Damovo	Globe Business
ATSG	Cato Networks	Data#3 Limited	GTT
Aussie Broadband Limited	CBTS	Datacom	HCLTech
Axians	Celcom Malaysia	Deutsche Telekom	HPE Aruba
Axiata Group Berhad	Coforge Limited	DTAG	Hughes
Bechtle	Cogent Communications, Inc.	DXC Technology	iliad/Free
Bharti Airtel	Colt	Empist	Infosys
Birlasoft	Comcast Business	Entag	Insta ICT solutions
Blackbox	Commscope	Ericsson	Interactive Pty Ltd

Invited Companies

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KPN

Kyndryl

Logicalis

Lumen

M1 (Singapore)

Macquarie Technology Group Limited

Maxis Berhad

Megaport Limited

MetTel

Microland

MNJ Technologies

Mphasis

NEC

Nera

NexGen (Singapore)

Nile

NTT Data

Nuage

Open Systems

Optus (Australia)

Orange Business

PCCW

Persistent Systems Limited

PLDT Inc.

Presidio Networked Solutions LLC

PRO IT

Progessive Infotech

Proximus

PT Indosat

PT Smartfren Telecom Tbk

PT Telekomunikasi Indonesia Tbk

Ramen Networks

Reliance Jio

Riedel Networks

Sify Technologies

Singtel

Sonera

Spark New Zealand

StarHub

Stratus networks

Superloop Limited

Swisscom

Syringa

Systal

Tata Communications

Tata Teleservices (Maharashtra) Limited

TCS

TDS Business

Tech Mahindra

Telefonica

Telekom Austria

Telekom Italia

Telekom Malaysia Berhad

Telenet

Telenor

Telia

Telkom Indonesia (Indonesia)

Telstra

T-Mobile

TPX

Invited Companies

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Trigyn Technologies LTD

True Corporation (Thailand)

Verizon

Vodafone

WAVE Business Solutions

Windstream enterprises

Wipro

Zensar Technologies

About Our Company & Research

ISG Provider Lens™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens™ research, please visit this webpage.

ISG Research™

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

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ISG

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Founded in 2006, and based in Stamford, Conn., ISG employs 1,600 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data.

For more information, visit isg-one.com.

ISG Provider Lens™

JULY, 2024

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