

Network As A Service - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

Network As A Service Market Analysis

The Network as a Service market size is valued at USD 33.22 billion in 2025 and is forecast to reach USD 115.36 billion in 2030, registering a 28.3% CAGR over the period. This expansion reflects a decisive enterprise shift from capital-intensive hardware ownership toward consumption-based service models that align operating budgets with agility needs. Strong momentum comes from cloud-first transformation roadmaps, rapid SD-WAN and SASE rollouts, and AI-driven network-assurance engines that cut mean time to repair to under five minutes. North America retains primacy through robust enterprise digitalization and a mature managed-services ecosystem, while Asia-Pacific posts the fastest growth, supported by large-scale modernization programs and strict data-sovereignty mandates. Competitive intensity is rising as legacy equipment vendors reposition around service portfolios and telecom carriers monetize private-5G slicing. At the same time, data-residency rules, vendor-lock-in anxieties, and IFRS 16/ASC 842 accounting complexity temper near-term adoption prospects.

Global Network As A Service Market Trends and Insights

Enterprises' "cloud-first" network-transformation roadmaps

Modernization programs are redefining infrastructure consumption as organizations retire legacy hardware in favor of cloud-native, software-defined platforms that deliver intent-based automation and integrated security. Cisco notes that 91% of technology executives have boosted networking budgets to underpin AI and IoT workloads, with unified NaaS frameworks

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emerging as the preferred path to rapid innovation. Tight coupling of connectivity, security, and observability under a single operational model enables quicker provisioning, lower downtime, and consistent policy enforcement across multi-cloud estates. The resulting agility strengthens the Network as a Service market by turning networking into an elastic utility rather than a depreciating asset.

Shift from CapEx to OpEx subscription budgeting pressure

IFRS 16 and ASC 842 compel enterprises to recognize leases on balance sheets, complicating traditional hardware-procurement economics. Consumption-based networking helps firms sidestep large capital allocations, smooth cash-flow profiles, and shorten refresh cycles, driving uptake among CFO-led transformation initiatives. Predictable monthly spend also reduces financial risk when technology lifecycles accelerate, making subscription models especially attractive for mid-market adopters.

Persistent data-sovereignty and residency compliance barriers

Regional mandates such as the European Data Act and China's cybersecurity law require local processing and impose cross-border transfer restrictions. These frameworks complicate global service uniformity, forcing providers to deploy fragmented footprints that dilute economies of scale and extend procurement cycles, thereby slowing the Network as a Service market in regulated sectors.

Other drivers and restraints analyzed in the detailed report include:

SD-WAN and SASE convergence accelerating managed WAN refresh / Campus-LAN NaaS demand to counter Wi-Fi 7 power spikes / Vendor lock-in fears around proprietary lifecycle platforms /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

The Network as a Service market size for WAN-as-a-Service reached USD 15.10 billion in 2024 and accounted for 45.5% of revenue. Enterprises prioritize resilient, application-aware connectivity that supports hybrid work and cloud adoption. Campus-Switch-as-a-Service, however, is forecast to expand at 29.8% CAGR to 2030, propelled by Wi-Fi 7 rollouts that demand sophisticated power-management and RF optimization.

Vendors bundle switching, access points, and assurance software into subscription contracts, flattening the procurement barrier for mid-sized campuses. Over the forecast horizon, LAN-as-a-Service and data-center interconnect offerings are expected to gain share as organizations converge campus, WAN, and cloud fabrics under unified contracts. The push toward single-platform operations will keep service-type diversification at the forefront of Network as a Service market expansion.

Virtual CPE held 42.8% share in 2024 as enterprises replaced hardware routers with software images hosted on white-box devices. Integrated network-security-as-a-service exhibits the strongest trajectory with a 29.3% CAGR, reflecting growing reliance on SASE frameworks that blend connectivity and threat defense.

Bandwidth-on-Demand and managed VPN remain complementary, enabling dynamic capacity scaling for seasonal workloads and secure connectivity to low-bandwidth sites. By 2030, integrated security is expected to overtake virtual CPE as enterprises regard secure connectivity as baseline. The trend underpins steady increases in Network as a Service market size, channeling spend toward multi-function service tiers that bake compliance, DDoS protection, and observability into a single SLA.

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The Network As A Service Market Report is Segmented by Type (LAN-As-A-Service, WAN-As-A-Service, and More), Application (Virtual CPE (vCPE), Bandwidth-On-Demand (BoD), and More), Organization Size (Large Enterprises and Small and Medium Enterprises (SMEs)), Industry Vertical (IT and Telecom, BFSI, Healthcare, and More), and Geography. The Market Forecasts are Provided in Terms of Value (USD).

Geography Analysis

North America held the lion's share at 35.4% in 2024, reflecting a sophisticated cloud ecosystem, early SASE adoption, and an active MandA landscape that consolidates capabilities within incumbent vendors. HPE's planned USD 14 billion acquisition of Juniper Networks intends to double networking revenue contribution, signaling a platform play to challenge Cisco's dominance. Federal and state data-privacy rules further spur managed-service uptake by enterprises that lack compliance resources in-house.

Asia-Pacific is poised for a 28.9% CAGR through 2030 as governments fund digital-infrastructure build-outs and telcos commercialize private-5G slicing for industrial campuses. China's data-localization mandates encourage sovereign-cloud NaaS models, while India's Production-Linked Incentive program stimulates factory digitization, together bolstering regional demand.

Europe remains opportunity-rich despite tight regulations; the upcoming Digital Operational Resilience Act drives banks and insurers toward managed connectivity that embeds audit-ready reporting. Service providers tailor offerings to satisfy GDPR, data-act portability, and emerging cyber-resilience benchmarks, promoting steady uptake. Latin America, the Middle East, and Africa are still nascent but gaining traction as cloud-service availability rises and energy-price volatility increases appetite for predictable OpEx consumption models.

List of Companies Covered in this Report:

Cisco Systems Inc. / Hewlett Packard Enterprise (Aruba/GreenLake) / ATandT Inc. / Verizon Communications Inc. / IBM Corp. / DXC Technology / TD SYNEX (Avnet) / NEC Corp. / Oracle Corp. / GTT Communications / VMware (Broadcom) / Telstra Group / Lumen Technologies / Cato Networks / Aryaka Networks / Juniper Networks / Nokia (Alcatel-Lucent Enterprise) / Akamai Technologies / Masergy (Comcast Business) / Proofpoint / Meta Networks / Extreme Networks / Fortinet Inc. /

Additional Benefits:

The market estimate (ME) sheet in Excel format /
3 months of analyst support /

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