FRAMINGHAM, Mass. August 31, 2020 – International Data Corporation (IDC) today published a new assessment of twelve global communication service providers offering managed SD-WAN services. The IDC MarketScape report uses a comprehensive framework to assess these vendors relative to a set of criteria that explain both short-term and long-term success in the managed SD-WAN services market. The twelve global communication service providers evaluated in this MarketScape report are: AT&T, BT, CenturyLink, GTT, NTT, Orange, Sprint, Tata Communications, Telefonica, Telstra, Verizon, and Vodafone.

The managed SD-WAN market is at an inflection point, moving from early adopter to early majority phase, building on the momentum generated from early deployments. Today, SD-WAN is a top of mind consideration for enterprises as they pursue their digital transformation strategies. The architectural advantages of SD-WAN, with the ability to provide direct and secure connectivity to cloud applications, respond to increasing bandwidth demand, and be flexible to integrate new virtual network functions (VNFs), are well suited to organizations striving to become a digital enterprise. SD-WAN is also well suited to support a widely distributed remote work environment.

With enterprise adoption of managed SD-WAN services on the rise, service providers are adopting differentiation strategies that emphasize their ability to simplify the full life cycle customer deployment experience. Several providers have responded to the recent pandemic by extending SD-WAN to the remote worker leveraging VPN connectivity and SD-WAN gateways. This is commendable and underscores the resilience of SD-WAN architecture to deal with unforeseen circumstances.
Other service provider developments designed to attract potential enterprise customers include:

- Offering end-to-end reporting at the application level and provide an integrated overlay/underlay view.
- Extending software-defined to the LAN with the intent to capture opportunities in the intelligent branch.
- Expanding security offerings to address customer premises equipment (CPE), application, cloud-connectivity, and other vulnerabilities.

"As managed SD-WAN transitions from early adopter phase to early majority, global service providers are shifting their emphasis from the technical merits of SD-WAN toward underscoring the benefits that managed SD-WAN brings in terms of simplifying and improving the customer deployment journey," said Ghassan Abdo, research vice president, Worldwide Telecom, Virtualization & CDN. "This pivot will entail extensive developments in orchestration, automation of operational processes, gaining insight from data with artificial intelligence and machine learning, and simplifying the contractual and pricing frameworks."

The report, IDC MarketScape: Worldwide Managed SD-WAN 2020 Vendor Assessment (IDC #US45837420), provides an assessment of twelve communication service providers that offer SD-WAN managed services on a global basis. The assessment is based on their
current capabilities and future plans for delivering managed SD-WAN services.

About IDC MarketScape

The **IDC MarketScape** vendor analysis model is designed to provide an overview of the competitive fitness of IT, telecommunications, or industry-specific suppliers in a given market. The research methodology utilizes a rigorous scoring methodology based on both qualitative and quantitative criteria that results in a single graphical illustration of each vendor's position within a given market. IDC MarketScape provides a clear framework in which the product and service offerings, capabilities and strategies, and current and future market success factors of IT, telecommunications, or industry-specific vendors can be meaningfully compared. The framework also provides technology buyers with a transparent foundation to allow companies to independently compare the strengths and weaknesses of current and prospective vendors.

For more information about IDC MarketScape, please contact Karen Moser at kmoser@idc.com.

About IDC

International Data Corporation (IDC) is the premier global provider of market intelligence,
advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,100 analysts worldwide, IDC offers global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries. IDC’s analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly-owned subsidiary of International Data Group (IDG), the world’s leading media, data and marketing services company. To learn more about IDC, please visit www.idc.com. Follow IDC on Twitter at @IDC and LinkedIn. Subscribe to the IDC Blog for industry news and insights: http://bit.ly/IDCBlog_Subscribe.

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