IDC MarketScape

IDC MarketScape: Worldwide Managed SD-WAN Services 2025 Vendor Assessment

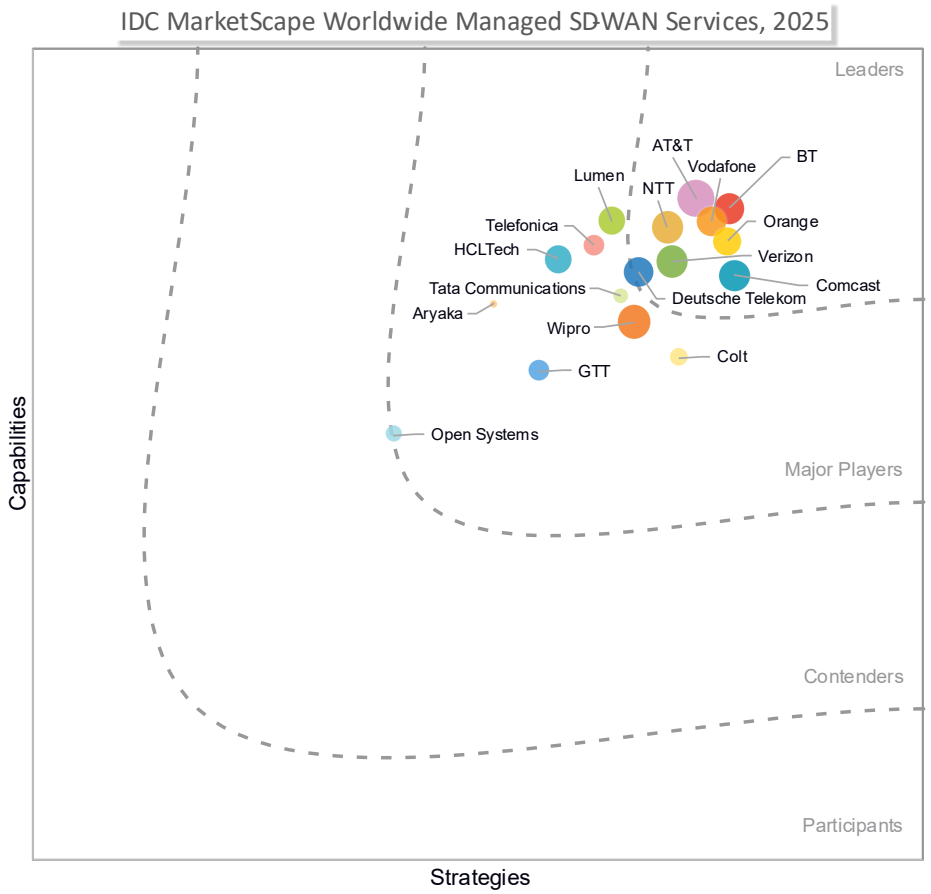
Ghassan Abdo James Eibisch

THIS EXCERPT FEATURES ORANGE AS A LEADER

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Managed SD-WAN Services Vendor Assessment



Source: IDC, 2025

September 2025, IDC #US52980125e

Please see the Appendix for detailed methodology, market definition, and scoring criteria.

ABOUT THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Managed SD-WAN Services 2025 Vendor Assessment (Doc # US52980125).

IDC OPINION

This study utilizes the IDC MarketScape methodology to evaluate global communications service providers (communications SPs) offering managed SD-WAN services.

Global service providers have had a long history of providing managed SD-WAN services dating back to 2015. Software-defined networking captured the attention of networking decision-makers as enterprises had to navigate several trends including the move to cloud services, increased demand on bandwidth, and availability of lower-cost Ethernet connectivity services. Enterprises are facing additional challenges with the need to pursue a digital transformation journey, further accelerated with the advent of artificial intelligence (AI) technologies. SD-WAN services as such have become a strategic imperative for enterprises.

Global service providers have had good success serving the multinational corporation (MNC) and large enterprise segments with high-touch sales effort. The move down to SMEs, however, has been challenging, with sporadic successes.

This study provides a comparative view of 17 global providers and summarizes key takeaways assessed from numerous interviews with enterprises that have deployed managed SD-WAN services. These key takeaways are beneficial to all ecosystem players, technology providers, service providers, and enterprises. The key takeaways from this IDC MarketScape are discussed in the sections that follow.

Market Adoption

- Managed SD-WAN services adoption continues to gain strong momentum as evidenced by strong revenue growth by most global service providers.
- Key drivers for SD-WAN adoption include network transformation, upgrade of legacy MPLS networks, higher-bandwidth demands, enhanced application availability, and cloud adoption.
- Managed SD-WAN services target segments that are primarily MNCs and large enterprises.

- Some global service providers have had success serving the midmarket; however, the SMB segment is still underserved.
- SD-WAN maturity differs across the market: many large enterprises are on their second or even third generation of SD-WAN solution, whereas other, typically smaller, companies have yet to adopt the technology.
- The most targeted verticals include retail, manufacturing, and financial services.

Support Services

- Most enterprises opt for a fully managed service although comanaged services, where customers and service providers agree and share management responsibilities, have been increasing in popularity in recent years.
- Most MNCs would like to sign a single service-level agreement (SLA) with the managed service provider (MSP) with the expectation that the underlay services provided by third-party internet SPs are handled under that single contractual framework.
- Global service providers are providing extensive security consulting to enterprises to help them decide on the most relevant security services.

Orchestration and Client Portals

- All global service providers provide a client portal to allow customers to change configurations, obtain reports, and request analytics data.
- Most portals allow direct access to the supported vendor portals/consoles. While service providers continue to evolve their own orchestration layer and are improving their ability to orchestrate across vendors, there are practical and economic limits to how much vendor capability they can and should replicate themselves. They continue to rely on accessing the interfaces of the underlying vendor portal. This limits the extent to which they and customers can manage multivendor deployments within a single portal.
- Real-time reporting of network anomalies and the level of granularity of these reports are some of the key complaints of enterprises. This is an area that deserves significant attention from the service providers.
- Most global service providers claim to use artificial intelligence and machine learning (ML) technologies to enhance predictive maintenance and improve use of customer data. We believe there are opportunities for improvement here, especially the use of generative AI (GenAI) to simplify access to data and analytics.

Technology and Vendors

- Most global service providers rely on several SD-WAN vendors to ensure coverage of target segments. They typically offer three to five vendor solutions with a tendency to reduce the number of vendors.
- All major SD-WAN providers also offer secure service edge (SSE) capabilities based on vendors such as Zscaler, Netskope, and Palo Alto Network's Prisma Access. These are usually offered either standalone or in conjunction with SD-WAN in the form of SASE solutions.
- Global service providers continue to rely on vendor CPE devices despite an evolving market toward universal CPE (uCPE) based on x86. We believe that the move to uCPE should be accelerated to mitigate reliance on complex supply chains and improve the ability to support multivendor SD-WAN and SASE solutions.
- The dominant deployment model for SD-WAN is on premises. Security services are typically cloud hosted or hosted on provider's points of presence (POPs). Most global providers deploy POPs within acceptable low-latency needs of their customer base to ensure good performance of networking and security services.
- Interoperability remains a challenge, especially across vendor virtual network functions (VNFs) and certainly spanning carrier boundaries.
- Several global providers are extending their software-defined capabilities to the LAN with the intent to capture opportunities in the intelligent branch, integrated with the WAN and security.
- Network as a service (NaaS) is still a work in progress. Global providers need to accelerate effort here as cloud consumption models are attractive to enterprises as they value flexibility, scalability, and automation, key hallmarks of NaaS. Early examples included dynamic bandwidth capabilities such as Colt's portfolio of on-demand services. More recently, a platform approach to NaaS has started to emerge that aims to offer a broad range of flexible, scalable, and consumption-based network services including SD-WAN. Examples include BT's Global Fabric and Orange Business' Evolution Platform.

Go-to-Market and Branding

- Despite some progress, most providers lack a cohesive marketing and branding communication plan for their managed SD-WAN services.
- Most global providers rely on channel partners to target the midmarket and SMB segments. These segments are generally underserved and represent a greenfield opportunity.

- Most global services eye global expansion to geographies not currently served. This can be challenging due to increased global competition and required investments in GTM and support services.

In summary, the managed SD-WAN services market is very dynamic. Global service providers understand its strategic importance to enterprises as they navigate the journey to network transformation. The deployment effort is still complex and requires dedicated resources and experience to deliver on its promise. Reporting continues to be a challenge for enterprises.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

This IDC MarketScape included service providers from all regions, the Americas, EMEA, and APJ, that met the following criteria:

- Service providers that have global capability and serve global MNCs
- Service providers with minimum $25 million annual revenue in 2024
- Service providers demonstrating commitment to further development of their managed SD-WAN services
- Service providers that are driving innovation in their SD-WAN road map

ADVICE FOR TECHNOLOGY BUYERS

Managed SD-WAN has become a strategic imperative for enterprises as they pursue their network transformation journey. According to IDC's 2024 *Worldwide Future of Enterprise Connectivity Services (FECS) Survey,* 45% of medium-sized and large enterprises globally currently use SD-WAN, with security, flexibility, and easier WAN management as the three most important benefits, and telecom service providers (the most common implementation partner). Technology buyers looking to adopt or refresh their SD-WAN solutions should seek service providers that can ensure a successful deployment journey and provide a future road map that incorporates service innovation, shifts to edge services, and integrated security services and leverages AI/ML to deliver a compelling customer experience. Furthermore:

- The ability of the managed SD-WAN services provider to de-risk the deployment journey through automation spanning the planning, proof concept, design, configuration, and deployment phases
- The depth of industry knowledge and pretested configurations relevant to certain industry segments such as retail, financial, health, and manufacturing

- The flexibility and adaptability of the commercial model to incorporate uniform service-level agreements, cloud consumption model, pricing transparency and predictability, and flexible support models
- The depth and real-time aspects of end-to-end performance management including underlay, overlay, and application layer
- The extent of innovation agenda to include the buyer as a co-innovation partner
- The maturity of the client portal to simplify configuration management and strive toward self-management including digital experiences
- The reporting data that is real time assesses network performance, anticipates corrective actions, and utilizes for improved customer service
- The integration of security solutions within the context of SASE concepts
- The global reach of the provider to ensure coverage in target geographies
- Stronger focus on the SD-WAN life cycle, service wrap, digital experience, and business outcomes than on specific vendor partner choices

VENDOR SUMMARY PROFILES

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

Orange

Orange is positioned in the Leaders category in this 2025 IDC MarketScape for worldwide managed SD-WAN services.

With 650 POPs, Orange has one of the largest global network footprints, providing service in over 200 countries, 65 of which are served by local Orange teams direct. Global NOCs are located in Brazil, Egypt, and India.

The company launched its first SD-WAN solution in 2016. Since then, it has expanded its capabilities and partners significantly, and it is transforming the way it offers, builds, and manages solutions to customers via its Evolution Platform. Main SD-WAN vendor partners today are VeloCloud, HPE Aruba, Cisco, Fortinet, and Palo Alto. The latter two are also SSE partners along with Netskope and Zscaler and collectively make up the company's SASE offerings. Versa will also be added later in 2025. Orange Business is certified with all its primary partners (with 17,000 certified employees in total) as well as joint go-to-market relationships.

For several years, Orange Business' primary SD-WAN offering has been the Flexible SD-WAN family of fully or comanaged services based on Cisco, Fortinet, or VeloCloud. While the partners remain the same (and HPE Aruba and Palo Alto are added), the company's SD-WAN propositions are migrating to Evolution Platform, which is now at the heart of Orange's network service strategy.

Evolution Platform is a modular solution design and delivery platform deployed in Orange's software-defined Super POPs currently located in 50 of the company's own sites and carrier-neutral colocation facilities globally. Partners such as SD-WAN and SSE vendors, as well as cloud connectivity, are instantiated as VNFs in Orange's POPs and exposed to customers via a digital interface and APIs. More than a service order platform, Evolution Platform lets customers (by themselves or via Orange Business) compose solutions graphically by chaining available functions. Provisioning is automated according to the customer's configuration and managed via the Evolution Platform console; billing can be usage based, and solutions are backed by end-to-end SLAs.

Orange Business provides a full set of consulting, advisory, deployment, and operational services to guide the customer as required, as well as observability, management, and optimization tools. Resulting solutions can be self-managed, comanaged, or fully managed. Orange Business stresses the flexibility of its approach, with customers free to control as much of the design and management as they like. High-level reporting, dashboards, and ticketing are provided by the Evolution Platform console, which also gives access to underlying vendor consoles for more detailed information and fine-tuning. Orange Business positions Evolution Platform as providing the best of two worlds: the resilience and performance of telco networks and the flexibility of SIs.

Orange Business has implemented, and plans to implement, several AI use cases to support network operations and customer experience. These include categorizing, analyzing, and summarizing incident reports, anomaly detection, incident prediction, and capacity and usage forecasting. Over the next two years, the company plans to use AIOps within its NewCo IT stack to expand its AI and automation capabilities including to automate SD-WAN deployment, generate configurations, automatically assess the compliance of solutions, and apply GenAI and copilots widely across operational and customer-facing activities.

Strengths

Orange Business benefits from its considerable global scale and depth of MNC relationships. Its main strengths include:

- Orange's global network footprint and operational presence, providing service in every territory
- The Evolution Platform strategy that will transform how customers consume and manage SD-WAN, SASE, and other services from Orange (The platform and associated processes are designed to be particularly flexible in terms of customer choice and desired level of engagement.)
- A mature set of consulting and professional services that augment technical solutions and help guide customers, for both existing and Evolution Platform–based deployments

Challenges

To compete beyond current coverage areas, Orange can benefit from the following:

- Embark on marketing campaign to increase name recognition and perception on a global basis.
- Continue the development of Evolution Platform in terms of AI capabilities, go-to-market partnerships, and business-relevant use cases.
- Pivot toward Inferencing at the Edge as the concept is gaining ground and can provide long-term differentiation and revenue growth opportunities. Some emerging use cases are security, media, IoT, and data sovereignty.

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market Definition

Since its inception in 2015, SD-WAN was viewed as a transformational technology that addressed the enterprise needs for cloud adoption, flexible service introduction, and dynamic bandwidth allocation. It has since been elevated as the underpinning of network transformation, fundamental to the digitization of enterprises. The demands on the network are constantly evolving considering the adoption of AI and GenAI technologies, demanding higher bandwidth and variable traffic patterns.

Global communications SPs initially offered network-based SD-WAN managed services primarily based on Cisco IWAN. They later incorporated OTT solutions from start-ups such as Viptela, VeloCloud, and Versa in response to enterprise demand and to fend off against competition from these vendors.

2019 witnessed an acceleration of managed SD-WAN adoption and increase in commercial deployments. SD-WAN architecture has evolved to integrate security services under the umbrella of Secure Access Service Edge (SASE). From a commercial perspective, SD-WAN/SASE is increasingly bundled under the network-as-a-service (NaaS) commercial framework. NaaS provides a cloud consumption model of networking services and integrates it under a single SLA.

Managed SD-WAN services continue to experience strong growth. IDC has forecast that managed SD-WAN services will experience significant growth in the forecast period of 2022–2028, culminating in worldwide revenue of around $14.17 billion in 2025. Communications service providers will grab the lion's share of this managed SD-WAN market, reaching 65% market share.

LEARN MORE

Related Research

- *Worldwide Managed Edge Services Forecast, 2025–2029* (IDC #US53507526, June 2025)
- *NaaS: Market Trends 2025* (IDC #US51677424, May 2025)
- *Inference at the Edge: Implications for Service Providers* (IDC #US53114325, March 2025)
- *Top 5 Trends in Managed Edge Content Delivery Services in 2025* (IDC #US52277225, February 2025)

Synopsis

This IDC study presents an assessment of 17 managed service providers that provide managed SD-WAN services on a global basis. The assessment is based on their current capabilities and strategies for delivering managed SD-WAN services. This is the fourth comprehensive analysis by IDC on this rapidly growing market, and it provides insights to enterprises deciding on the adoption of managed SD-WAN services in their journey toward network transformation.

"Global service providers are pivoting toward automation, improved customer support service, and adoption of AI technologies in their pursuit to differentiate their managed SD-WAN services offers. Implementation, operational, and support challenges persist despite the maturity of the underlying SD-WAN technologies. Enterprises value trust, long-term relationships, and strong connectivity foundation as they assess their choice of service provider," says Ghassan Abdo, research VP, WW Telecom, IDC.

"The next phase of development in the SD-WAN market includes the emergence of NaaS platforms that will make the process of ordering, deploying, and managing SD-WAN and other network services easier and more flexible. In addition, they will make it easier for enterprises to compose end-to-end solutions by combining network and security services in a way that best fits their needs," said James Eibisch, research director, European Enterprise Communications Services.

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 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, 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, Inc.).

Global Headquarters

140 Kendrick Street
Building B
Needham, MA 02494
USA
508.872.8200
Twitter: @IDC
blogs.idc.com
www.idc.com