



Multi-cloud networking: a framework for understanding the opportunity and ecosystem



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About this report

This report analyses the emerging multi-cloud networking (MCN) market and value chain to establish a framework and taxonomy.

A new breed of network-as-a-service (NaaS) providers and SDN/cloud-native networking technology suppliers are entering the cloud connectivity market to meet enterprises' needs for consistent and programmable connectivity and related L4-7 services across multiple clouds and network domains. This is driving a significant change to the cloud connectivity value chain because these players are defining new market categories and are threatening to take existing revenue away from established suppliers (such as traditional operators and physical routing vendors).

This framework report describes the MCN buyer and supplier landscape, analyses the key players in the market and assesses the size of their opportunity. It will help service providers and vendors to identify their roles in this developing market and understand how spending will shift to new players and business models.

It is based on several sources:

- Analysys Mason's internal research and consulting projects with vendors and investors
- interviews with stakeholders in the multi-cloud connectivity market.

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KEY QUESTIONS ANSWERED IN THIS REPORT

- What is the MCN market opportunity and what are the key areas of growth?
- How is the MCN market structured and where do vendors and service providers sit in the taxonomy?
- What are the key components of MCN platforms?
- Which vendors and service providers are taking the lead in developing MCN platforms?
- What are the opportunities and threats for incumbent players in the enterprise connectivity market?



WHO SHOULD READ THIS REPORT

- Executives in the strategy and product marketing departments of IP networking vendors that need to understand the changes in the enterprise connectivity market, customer requirements and spending patterns.
- CTO office and strategy executives in telecoms operators, MSPs and co-location/IX providers that need to understand their roles in the emerging MCN value chain, as well as opportunities and threats.
- Investors looking at the opportunity for new vendors/service providers to enter and disrupt the enterprise networking market in response to emerging requirements for enterprise multi-cloud connectivity.



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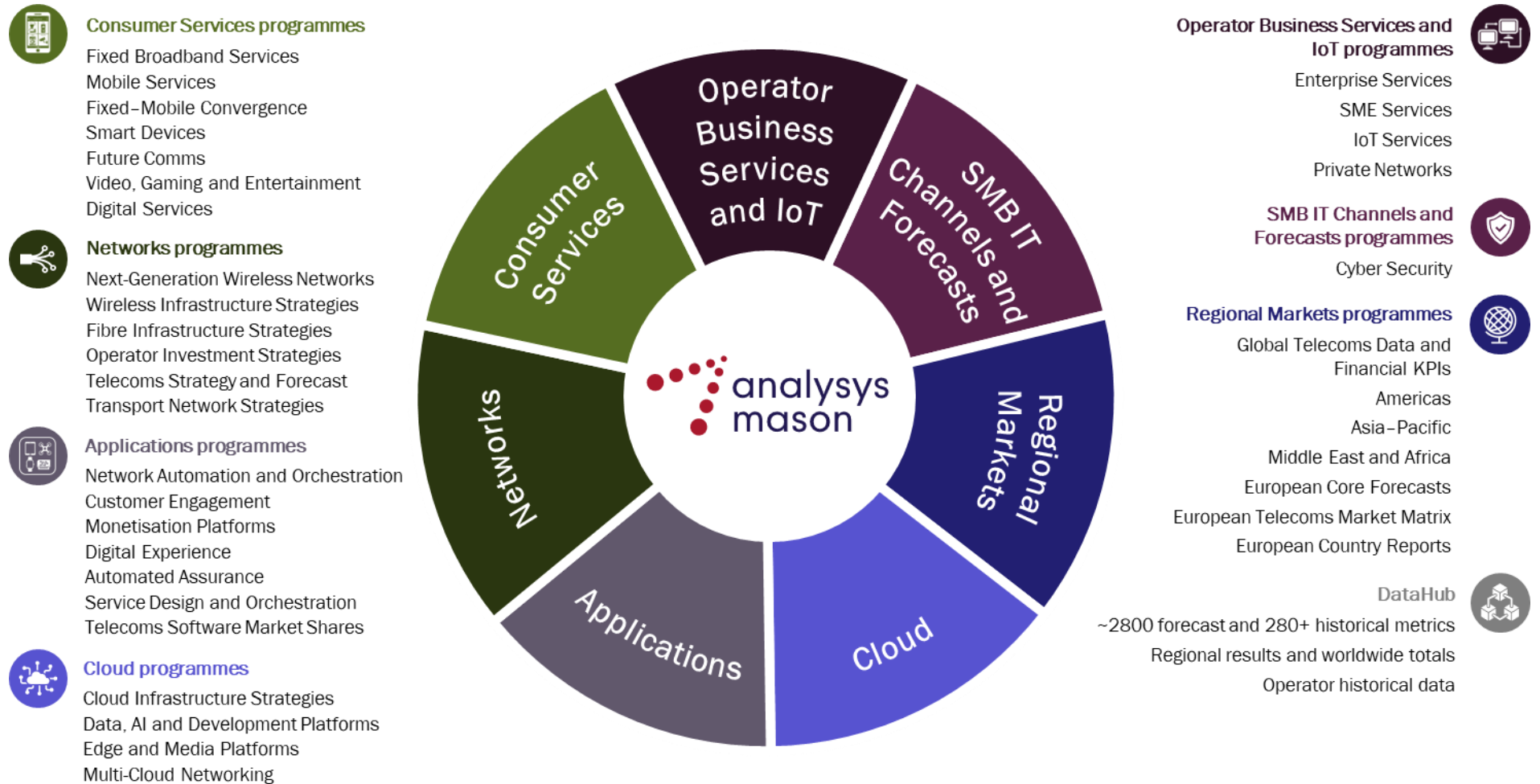
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MCN market segments

About the author and Analysys Mason

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