Magic Quadrant for Global WAN Services

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For this mature WAN market, AI integration, automation and customer experience can provide the differentiation to address ever-changing enterprise needs to deliver on digital business initiatives. I&O leaders can use this research to evaluate and select optimal global network service partners.

Strategic Planning Assumptions

By 2027, 65% of new software-defined wide-area network (SD-WAN) purchases will be part of a single-vendor secure access service edge (SASE) offering, an increase from 20% in 2024.

By 2028, 30% of large enterprises that use multiple public cloud providers will use software-defined cloud interconnect (SDCI) services or cloud hubs, up from 15% in 2024.

Market Definition/Description

This document was revised on 3 April 2025. The document you are viewing is the corrected version. For more information, see the Corrections page on gartner.com.

Gartner defines global WAN services as POP-based services supporting multiregional corporate networks. These services address enterprise challenges such as hybrid working practices, accelerating digital and cloud transformations and improving enterprise network agility. Providers own and operate their own global core networks and sell directly to the client. Services include transport-centric/unmanaged, managed, co-managed network services, or network as a service via a monthly fixed or usage-based fee model. Core transport services are often complemented by ancillary services like carrier-based cloud

interconnect, SD-WAN, SASE or managed services. Services are measurable and consumable through web-based customer interfaces via portals and programmable APIs.

As digital business initiatives increase demands on the enterprise network, the need for reliable bandwidth continues to grow. Growing cloud workloads and the rise in application-specific traffic are the main drivers for increases in bandwidth. Gartner has also observed AI and machine learning (ML) being used in network monitoring, optimization and provisioning to quickly address shifting requirements, such as SaaS and evolving infrastructure as a service (IaaS) and platform as a service (PaaS)-based applications. As a result, SaaS and these associated applications are putting pressure and a level of criticality never before seen to ensure optimal performance and unfailing support.

Enterprises rely on global WAN services to deliver global and regional fixed, wide-area networking connectivity. These services consist of backbone network transport and last-mile access connections to deliver connectivity to individual enterprise sites, such as large or remote/branch office locations. Although these are core to the offer, service providers also offer more transformational capabilities enabled by the underlay service network.

Mandatory Features

Gartner's view of the market is focused on foundational technologies or approaches delivering on the future needs of end users.

The mandatory features for this market include:

- **Ability to sell internet services to enterprise customers globally, including dedicated internet access (DIA) and broadband/DSL:** DIA should be offered as the provider's own service, which can be supplemented by DIA from partners. Broadband internet can be a resold solution but must be generally available on a global basis. Internet service points of presence (POPs) are provider-owned network equipment located at the provider's own facilities, colocation facilities or a third-party facility.
- **Ability to sell Multiprotocol Label Switching (MPLS) to enterprise customers globally:** MPLS should be offered as the provider's own service, with POPs in either a colocation facility or in the provider's own buildings (leased or owned real estate). MPLS service POPs are provider-owned network equipment located at the provider's own facilities, colocation facilities or a third-party facility.

- **Offer WAN services portals:** Provider portals and APIs must be available to enterprises to view network status and performance metrics.
- **Offer carrier-based cloud interconnect (CBCI):** This is a private connection, such as MPLS and/or Ethernet, between a service provider's network and the point of presence of one or more cloud service providers (CSPs). CBCI requires an interconnection between the network service provider (NSP) and the cloud provider at a provider-owned or third-party location, such as a data center or colocation facility. CBCI also must be available on a global basis to the major cloud providers.
- **Offer managed SD-WAN services:** Management of enterprise software-defined WAN (SD-WAN) can be delivered either by edge devices or through providers' network-based SD-WAN gateways globally. SD-WAN gateways can terminate SD-WAN connections from on-site appliances close to external resources such as cloud services. SD-WAN is augmented with network-based security capabilities to offer secure access service edge (SASE). SD-WAN is now nearly always secure SD-WAN with at least a firewall and offered as part of a long-term SASE adoption plan.
- **All WAN services must be generally available and offer global coverage (North America, Europe and Asia/Pacific at a minimum).** They may not be offered on an individual customer (one-off) basis or only in limited countries and territories. This market segment does not include wholesale or services sold to other providers.

Common Features

The common features for this market include:

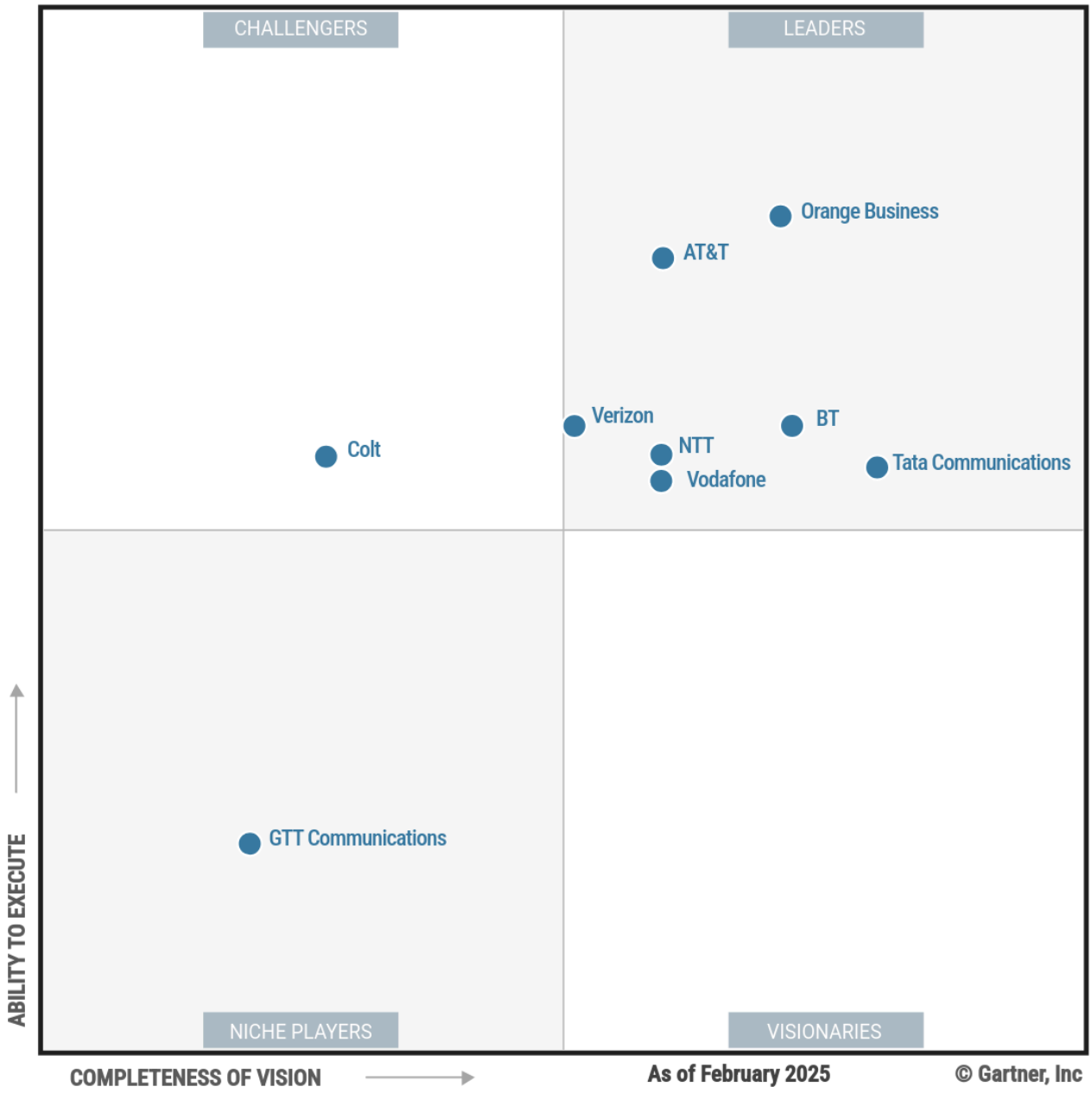
- **Managed SASE:** Managed SASE with single-vendor or dual-vendor SASE combining SD-WAN and security service edge (SSE) security from two integrated partners.
- **4G/LTE and 5G cellular WAN access:** Cellular services can be used as a type of WAN transport that enables rapid deployment of new locations, supporting temporary locations and providing diversified backup links.
- **LEO satellite access:** Low Earth orbit (LEO) satellite services can also be used for primary or backup WAN connections in locations where wireline services are limited or unavailable.
- **Network on demand (NoD):** NoD services from NSPs enable enterprises to make near-real-time changes to access/port bandwidth, change the WAN service types delivered

over a network port, and add and remove endpoints (for example, connections to cloud providers). This capability is available through provider-supplied customer web portals or APIs.

- **Advanced portal features:** Provider portals offering advanced analytics, including real-time and historical circuit utilization, circuit performance, incident/trouble tickets and SLA compliance. This can also include predictive analytics such as circuit configuration recommendations to improve performance. Other advanced features can include tools allowing customers to configure circuits, change network or security policies, or order new services, as well as a GenAI chat interface allowing customers to request analytics information or request service changes.
- **Enhanced internet services:** Enhanced internet backbone services or other approaches — including deterministic routing, ISP federations and network-based SD-WAN gateways — are designed to improve and stabilize the performance of purely internet-based global networks.
- **Network function virtualization (NFV):** NFV is an architecture to deliver multiple network functions — including routing, firewall, SD-WAN, WAN optimization and visibility — as software, called virtual network functions (VNFs). NFV can be implemented on universal customer premises equipment (uCPE) — typically via industry-standard x86 devices used in place of function-specific appliances — and in NFV service nodes located in the provider's network or in colocation facilities. NFV enables network functions to be activated on demand, deactivated when no longer required and consumed on an as-a-service basis.

Magic Quadrant

Figure 1: Magic Quadrant for Global WAN Services



Gartner

Vendor Strengths and Cautions

AT&T

AT&T is a Leader in this Magic Quadrant. Based in the U.S., AT&T is a major provider of U.S. fixed and mobile network services and global enterprise network services.

AT&T's current investments include plans to use AI-driven insights to optimize the price of connectivity — the first U.S.-headquartered carrier to do so. In addition, recent enhancements include targeting prospects in new fiber-lit buildings.

AT&T is a good fit for enterprises of all sizes, particularly large multinational enterprises with global networking requirements. It is also a good choice for clients with significant site requirements in North America, Europe and the Asia/Pacific region, where AT&T's private and public WAN service coverage is strongest.

Strengths

- AT&T expanded its digital functionality, simplifying proposal quotes, ordering, contracting, and move, add, change or delete (MACD) for high-volume services, enabling near-real-time changes across connectivity types. This included the ability to add embedded security functions to its dedicated internet services within 15 minutes on average.
- AT&T enterprise customers can now customize service management and billing and create custom hierarchies that align with their organizational structures. Also, enterprises can use single sign-on across AT&T's wireline and wireless portals.
- AT&T is in the process of improving key international WAN performance SLAs, such as inter- and intraregional packet performance.

Cautions

- Except for North America, AT&T's dedicated internet access (DIA) city and country points of presence (POPs) lag behind its Multiprotocol Label Switching (MPLS) presence. This is in contrast to nearly all the other providers evaluated in this research and could impact optimal support for migrations from its AT&T VPN (AVPN) portfolio.
- AT&T's SLAs lag behind others in this research due to the lack of network on demand, application performance and specific enhanced internet SLAs. Also, its chronic outage guarantees are weak, and there are significant gaps in SD-WAN and its cloud connectivity service (NetBond) SLAs. Since secure access service edge (SASE) SLAs vary by vendor, they are typically the underlying vendor's SLAs.
- AT&T's cloud connectivity uses far more exchange-based POPs out of region versus connecting directly to cloud service providers (CSPs). The types and number of cloud providers have not notably increased, and the same is true for the supported virtual network functions (VNFs).

BT

BT is a Leader in this Magic Quadrant. Headquartered in the U.K., BT is a telecommunications and network service provider, offering a broad portfolio of connectivity and managed services. In the U.K., it also offers Internet of Things and mobile network services.

In 2024, BT appointed Allison Kirkby as the new BT Group CEO. In 2025, Jon James was appointed CEO of BT Business as it became focused on the U.K. Bas Burger, previous CEO of BT Business, will focus on optimizing BT's international operations and explore options for the unit.

The vendor targets a diverse range of customers, including large enterprises and public-sector organizations, with a particular focus on industries such as financial services, energy, retail and manufacturing. BT's operations are primarily concentrated in Europe, with significant activities in North America, the Asia/Pacific region and the Middle East. It is particularly well-suited for large enterprises and multinational corporations that require comprehensive and secure WAN and multicloud connectivity solutions across multiple regions.

Strengths

- BT operates a comprehensive network infrastructure that spans multiple regions. This extensive reach allows the vendor to offer consistent services across diverse geographic locations, and it is particularly strong in Europe across all WAN services.
- BT continues to expand the reach of its convergent, programmable core network, called Global Fabric, which is engineered for multicloud support with enhanced near-real-time connectivity to cloud providers. It also offers on-demand delivery and service automation, combined with flexible commercial offerings.
- BT continues to invest in network automation and AI to enhance service delivery and customer experience, as well as to provide a comprehensive set of security features and services.

Cautions

- BT's international WAN customers and prospects (outside the U.K. market) should monitor updates on changes in the vendor's service offerings and delivery due to ongoing strategic assessments.
- BT's SLAs, particularly for managed services, are comparatively below the standard offerings of other providers evaluated in this research. In particular, BT lacks SLAs for

network on demand and chronic outages, and the SLA credits offered are low when compared to those of others in this research.

- The strategic realignments and key ongoing investments in BT have led it to concentrate its commercial efforts in international markets on serving its existing customer base. As a result, it is less focused on acquiring new clients during this transformative time.

Colt

Colt is a Challenger in this Magic Quadrant and is headquartered in the U.K. It is a wireline provider specializing in serving the enterprise market. Colt's portfolio offers infrastructure and connectivity services focused on automation and access aggregation for hyperscalers. Its enterprise solutions enhance professional and managed services for complex client needs.

Colt's investments in on-demand customer-defined routing service will introduce options to support route diversity and low-carbon footprints. It will also broaden and deepen its global WAN footprint, build new cloud connect hubs, and expand its internet partner portfolio. Additional roadmap items include flexible usage-based billing capabilities to support aggregation of usage commitment across multiple ports in multiple cities.

Colt is well-suited for organizations with a majority of their locations located in Europe and/or the Asia/Pacific region.

Strengths

- Colt is the only provider evaluated in this research with a consistently greater DIA presence in out-of-region countries than MPLS, but its footprint is confined to North America, the Asia/Pacific region and Europe.
- Colt's SLAs are above the industry average, with fewer gaps compared to many other vendors in this Magic Quadrant. For example, its enhanced internet service SLA guarantees latency between a customer's site and Microsoft's cloud.
- Colt's current and planned research and development investment is the highest among all the vendors evaluated in this Magic Quadrant. This investment has allowed Colt to release a new monitoring and reporting platform that features near-real-time analytics and tailored, client-specific dashboards. All clients within its customer base are now using the new platform.

Cautions

- Colt has no presence in Africa and no MPLS or wavelength presence in the Middle East. In Latin America, its network coverage remains limited, and it has no MPLS presence. Colt's direct cloud coverage is in the bottom tier of providers included in this research. Beyond the three top hyperscalers, Colt supports a limited number of unique cloud providers in all regions.
- After the Lumen EMEA acquisition, European clients report network reliability and operations support issues with Colt's network.
- Colt's SD-WAN lineup relies on just two vendors — Broadcom (VMware) and Versa Networks — which is less diverse than most vendors evaluated in this Magic Quadrant. Its SASE service options are also comparatively limited.

GTT Communications

Privately held GTT Communications (GTT) is a Niche Player in this Magic Quadrant. Based in the U.S., GTT is a provider of secure cloud networking for global enterprises with connectivity, networking, security, cloud and voice services.

GTT's continued evolution of its digital gateway, EnvisionDX, will include proprietary AI tooling for customers to interact with its service inventory using natural language. This will enable report generation, new service quoting, fault finding and SLA reviews. With these enhancements, GTT intends to improve the usability for the network and security infrastructure and make the insights available to a broader audience within the enterprise IT team. Customers will be able to observe performance against these new SLAs within EnvisionDX.

GTT is a good fit for enterprises with strong WAN coverage requirements in North America and Europe.

Strengths

- GTT's EnvisionDX portal is an intuitive digital experience for interfacing with its global Envision platform to manage its end-to-end solutions. Its user-friendly dashboard provides action menus for billing, reporting and monitoring, along with a network status map displaying site-based status and performance.
- GTT offers strong internet services, including broadband, through on-network services utilizing access products from wholesale Layer 2 vendors, delivered into the GTT network

via network-to-network interfaces (NNIs). It resells third-party off-net broadband internet globally (for example, using xDSL or fiber to the x [FTTx], cable, wireless and satellite access technologies).

- GTT is exclusively an access aggregator, specializing in combining and managing various access networks. It is well-suited for clients with highly diverse access and geography footprint requirements.

Cautions

- GTT does not support network on demand; rather, customers can burst their bandwidth at the same price per megabyte ($/MB) rate as their commitment rate. To address this, GTT plans to launch a networking as a service (NaaS) solution in 2H25.
- The majority of GTT's salesforce continues to be based in North America and Europe, where it supports existing and new acquisition global customers. GTT has very limited salesforce and customer support in the Asia/Pacific region, Middle East, Africa and Latin America.
- GTT follows an asset-light strategy, which does not offer any on-network, last-mile fiber connectivity, and all of GTT's POPs are in colocation facilities. Given these facts, and its privately held strategy, potential clients should consider how the vendor's strategy aligns with their own risk tolerance.

NTT

NTT is a Leader in this Magic Quadrant. It is headquartered in Japan. NTT provides a full range of network services around the globe.

NTT has been continuously investing in its software-defined platform to deliver a software-driven network and flexible consumption model approach. It has also invested in its generative AI (GenAI) capabilities, with internal and client-facing network agents that manage large-scale, dynamic network configurations. These agents create adaptive solutions in real time, reduce time to repair and time to make configuration changes, and also help generate responses to new security threats in real time.

NTT is well-suited to enterprises across most regions. However, potential customers in the Middle East and Latin America should assess NTT's ability to meet their business needs.

Strengths

- NTT's WAN customer portal is feature-rich, offering visibility, policy changes, network analytics and incident reporting. Enhanced automation and API integration in self-service portals have enhanced the customer experience when troubleshooting network and security incidents and real-time event correlation. NTT also uses AI/machine learning to automate service activation, accelerating SD-WAN/network deployment with proprietary templates.
- NTT has fully integrated ServiceNow into its offering, which supports more efficient trouble ticket processing and incident response.
- In terms of both number of targeted metrics and financial credits offered, NTT's SLAs excel in comparison to those of other providers in this research.

Cautions

- NTT provides very limited on-network, last-mile connectivity outside of Japan. This can lead to higher prices and added complexity. Additionally, its broadband access offerings are limited compared to its competitors, relying solely on third-party providers outside Africa and the Asia/Pacific region.
- NTT's private and public WAN services in Latin America and the Middle East are limited when compared to other vendors evaluated in this Magic Quadrant. Those seeking network services in Latin America and the Middle East may need to assess NTT carefully.
- NTT has not successfully overcome market perceptions of low penetration in regions outside the Asia/Pacific. With limited market visibility and based on feedback from Gartner client inquiries, the vendor is less often considered for global WAN services by enterprises located outside the Asia/Pacific market.

Orange Business

Orange Business is a Leader in this Magic Quadrant. Headquartered in France, it is a telecommunications service provider with local subsidiaries in 26 countries across Europe and Africa, and it has a broad portfolio of services.

The vendor's recent investments are in next-generation connectivity, trusted cloud solutions and cybersecurity, with a focus on its Evolution Platform. Orange Business also plans to reduce its service portfolio from 300 to 150, focusing on simplification and profitability and expanding its digital services and integration capabilities.

Orange Business supports multinational corporations and large enterprises across all vertical sectors. It is strong in the public sector in France, partly due to its data sovereignty offering. Orange Business is well-suited for enterprise clients that require scalable and secure WAN solutions across multiple regions.

Strengths

- Orange Business continues to have a stronger network presence in Europe, Africa, Latin America and the Middle East, compared to most other providers evaluated in this research.
- The vendor's continued investment in its Evolution Platform enables on-demand delivery of a broader catalog of VNFs, service automation and as-a-service commercial models. This includes down-to-the-hour options and digital service front ends (portals and APIs).
- Automation and AI in the vendor's service delivery remain above average among the providers in this Magic Quadrant. It includes demonstrated use cases in order creation, management of changes and incidents, field operations, and capacity management.

Cautions

- While Orange Business has a global presence, its sales teams, product capabilities and service levels vary by region. Therefore, clients outside France and Europe may not see the same level of services or support offered and sales engagement may vary. Enterprises should verify service availability, SLAs and support capabilities in their specific locations to ensure alignment with their needs.
- The vendor's customers may be impacted by its portfolio service reduction and its transformation of the IT stack that supports services and operations. Its customers should request clear and timely communication about any changes to or discontinuation of services, as well as notification of and remediation regarding potential service impacts from migrating services to the new IT stack.
- Wavelength connectivity is not available as a standard offering through Orange Business, which might limit options for enterprises requiring high-capacity, low-latency connections. Custom solutions are available through Orange Wholesale.

Tata Communications

Tata Communications is a Leader in this Magic Quadrant. Headquartered in India, it is a global provider of enterprise network services.

Tata Communications' strategic investments are in cloud networking solutions like its IZO Multi Cloud Connect (MCC; its SDCI platform to connect multiple clouds) and multicloud networking (MCN) software, which provides unified management from Layer 3 to Layer 7 networking. Tata Communications has also invested in AI-based fault diagnosis, which uses AI/machine learning for 85% accuracy, while AI-driven telemetry predicts and addresses issues for proactive network monitoring.

Tata Communications' solutions address the distinct demands of retail; banking, financial services and insurance; media; IT services; and manufacturing, including vertical-specific services. The vendor is a good fit for all enterprises, especially those requiring extensive coverage in Africa, the Middle East and the Asia/Pacific region.

Strengths

- Tata Communications is expanding its global reach by upgrading its on-demand fabric with intent-based network capabilities, enabling expansion into new geographies and enhancing services for financial hubs and low-latency solutions. Additionally, IZO Internet WAN Satellite supports both low Earth orbit (LEO) and geostationary Earth orbit (GEO) satellite services to address connectivity gaps in remote sectors such as oil and gas, mining, and marine.
- The vendor's network on demand service continues to offer more options than most providers evaluated in this research, including multicloud connectivity and a zero-based bandwidth option for temporary WAN links.
- Tata Communications' monitoring as a service provides customer-managed environments with configurable reports, customizable dashboards and configurable thresholds to match their business needs.

Cautions

- Tata Communications' management portal demonstrates minimal innovation and requires customers to toggle between individual service dashboards. It is not as advanced or efficient as the management portals offered by other providers in this Magic Quadrant.
- The vendor's SLAs are average and have gaps in terms of credits and consistency across services. The SLAs also lack application-level metrics.

- Tata Communications' cloud connectivity service availability by country is below average when compared to that of other vendors evaluated in this research. It has no cloud POPs in the Middle East and Africa and only one direct connection in Latin America. In addition, 70% of its 90 cloud POPs — including all 23 China POPs — are via exchange only.

Verizon

Verizon is a Leader in this Magic Quadrant. It is headquartered in the U.S. and provides wireline and wireless services.

Verizon focuses on the enhanced edge across its service networks. It plans to enhance its network capabilities by using programmable networks and APIs. This includes improvements in connectivity, automated bandwidth provisioning, automated SLAs, and enhanced security and observability. Verizon is also advancing its fixed wireless access (FWA) to support MPLS, native integrated security and internet networks. Additionally, Verizon is expanding customer-facing capabilities through its integrated NaaS portal, Digital Enablement Platform, enhanced Verizon Enterprise Center and Dynamic Network Manager.

Verizon's network service footprint is broad in coverage but lacks depth. The vendor is well-suited for enterprises of all sizes — particularly large multinational enterprises — with global networking requirements. However, potential clients should carefully review alignment of coverage overlap.

Strengths

- Verizon's implementation of deterministic routing includes optimized logic to improve latency and application performance for both site-site and site-cloud applications.
- Verizon's AIOps and digital interface automation enhance network reliability by preventing outages, optimizing resource allocation and delivering agile data insights. These tools identify anomalies, remediate vulnerabilities and adjust pricing based on market factors to improve operations and minimize disruptions.
- Verizon now offers site-specific business outcome SLAs to its NaaS clients in conjunction with select services.

Cautions

- Outside of North America and Europe, Verizon's city and country DIA presence lags behind its MPLS footprint. Outside of these markets, Verizon has a comparably broad

MPLS country presence, but it is not deep (in 75% of these countries, Verizon only has one MPLS POP).

- Verizon does not offer chronic outage, broadband, network on demand or application performance SLAs. Since SASE SLAs vary by vendor, they are typically the underlying vendor's SLAs.
- During contract renewals, Verizon's negotiating position frequently requires client commitments to increase overall spend as a condition to obtain competitive prices. It is the only provider in this research that uses this approach in negotiations and, as a result, customers may be challenged to lower spend if that is a priority objective.

Vodafone

Vodafone is a Leader in this Magic Quadrant and is headquartered in the U.K. It is a global telecommunications provider offering a wide range of network services.

In 2023, Vodafone appointed a new Group CEO. Since then, it has announced the divestiture of its operations in Spain and Italy, the merger of its domestic U.K. operation with Three, the restructuring of its local German subsidiary, and a joint venture with Accenture. Vodafone has also spun off its Internet of Things business.

The vendor is investing in network automation, cloud connectivity, 5G expansion and security solutions. It is enhancing its Super POP infrastructure and wireless portfolio with new cellular and satellite connectivity options, including a NaaS offer for eSIM FWA capability.

Vodafone serves all verticals but has a deeper focus on financial services, manufacturing and retail. While it primarily targets direct sales to European enterprises with large international footprints, it is also a good fit for enterprises with global networks that require strong coverage in Europe, the Middle East, Africa and/or the Asia/Pacific region.

Strengths

- Vodafone boasts a wide geographic coverage with significant presence across Europe, Africa and the Asia/Pacific region, which helps provide consistent service delivery and connectivity for multinational enterprises.
- Vodafone continues the rollout of its new converged Super POP infrastructure that supports self-service delivery through enhanced automation and orchestration, multicloud networking, and consumption-based as-a-service models.

- The vendor is reinforcing its managed services, user portal and API capabilities across many of its products and operations. This provides more consistent user experiences in the digital service interfaces across WAN services, mobility, cloud, edge, security and Internet of Things products.

Cautions

- Vodafone does not have network DIA POPs in Latin America and has only two MPLS POPs in Brazil, which may limit its ability to offer competitive services in the region. Despite recent rollouts, Vodafone's Super POP footprint is limited when compared to other providers evaluated in this research.
- Vodafone's recent business restructuring affected several domestic operations in Europe as well as Group capabilities, with layoffs, spinoffs, mergers and divestitures. Enterprises should assess the potential impact on their operations, especially if they rely on services in these markets.
- Vodafone's portal may present challenges in user experience due to its fragmented interface, with various functionalities accessible only through separate dashboards.

Vendors Added and Dropped

We review and adjust our inclusion criteria for Magic Quadrants as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant may change over time. A vendor's appearance in a Magic Quadrant one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. It may be a reflection of a change in the market and, therefore, changed evaluation criteria, or of a change of focus by that vendor.

Added

No vendors were added to this Magic Quadrant.

Dropped

Comcast Business, Deutsche Telekom and RIEDEL Networks no longer met the inclusion criteria and were dropped from this Magic Quadrant.

Inclusion and Exclusion Criteria

To qualify for inclusion, providers must:

- Demonstrate global network reach and coverage for both private and public WAN services:
    - Must own a core backbone network, composed of MPLS and internet in North America, the Asia/Pacific region and Europe at a minimum, while Middle East, Africa and Latin America are desirable. Providers must operate their own global core backbone with a minimum number of POPs in all three major regions at a minimum. “Ownership” requires that the provider own the rack and the equipment/Border Gateway Protocol (BGP)/etc., versus a lease arrangement.
    - Must offer and include access as part of the solution (bring your own access [BYOA] solely offered does not meet inclusion criteria). WAN services must include end-to-end SLAs, regardless of access provider.
    - Must have a minimum of five MPLS POPs in five different cities in each of the following geographic regions: North America, Europe and Asia/Pacific, either in owned or leased buildings or in colocation facilities. Providers must fully identify where POPs are located for inclusion.
    - Must have a minimum of 10 internet POPs in 10 different cities in each of the following geographic regions: North America, Europe and Asia/Pacific, either in owned or leased buildings or in colocation facilities. Providers must fully identify where POPs are located for inclusion.
    - Must offer broadband access services (minimum 100/10 Megabits per second [Mbps]) that are either inherent to the provider’s core WAN offerings or offered in a resale model in all three major regions (North America, Europe and Asia/Pacific).
    - Must offer 4G/LTE and/or 5G cellular WAN access connectivity in each region (North America, Europe and Asia/Pacific) either directly or through partners for a comprehensive offering.
- Offer a WAN service customer portal for its enterprise private and public WAN services. Providers’ online service portals should give customers a view into provider performance

and offer visibility into network operations and performance to support service modifications and verify SLAs for key performance metrics.

- Offer managed SD-WAN services globally with a minimum of five physical SD-WAN gateways in five different cities (or countries) in each of the following geographic regions: North America, Europe and Asia/Pacific, from at least two different vendors.
- Have a minimum of five physical SASE nodes in five different cities in North America, Europe and Asia/Pacific. These nodes may be self-owned, via partner SASE services or resold third-party security service edge services. Further, the provider must offer both single- and dual-vendor SASE options and support at least four of the following functions: SD-WAN (with or without embedded security functions), secure web gateway, cloud access security broker, network access control and network firewalling (with or without an intrusion detection system/intrusion prevention system).
- Have a minimum of five physical carrier-based cloud interconnect (CBCI) nodes to the three leading cloud providers (including Amazon Web Services, Google Cloud Platform and Microsoft Azure) in all three regions (North America, Europe and Asia/Pacific), either directly or via third-party exchanges.
- Have a minimum of five access aggregation nodes in each of the three regions (North America, Europe and Asia/Pacific), and these must include fiber, DIA, DSL/wireline broadband, and optional FWA 4G, 5G and LEO/GEO services based on either owned or third-party access services.
- Confirm that no more than 70% of revenue is generated from a single region or its home geographic region.
- Operate their own global network services (rather than simply reselling the services of other global or regional network providers) and provide last-mile connectivity in all three major regions (North America, Europe and Asia/Pacific). They must also have availability in at least one of the following areas: Latin America, the Middle East or Africa.
- Demonstrate active global sales activity by having signed at least one new contract (signed in the last 12 months) for global enterprise network services in each major region (North America, Europe and Asia/Pacific) as a net-new account for global WAN services. These should include provisioned sites in a minimum of three of six regions (North America, Latin America, Europe, the Middle East, Africa and Asia/Pacific).

Evaluation Criteria

Ability to Execute

Gartner analysts evaluate WAN service providers on the breadth of their network service portfolio in terms of features, quality and processes to deliver the services. These criteria enable service providers' performance to be competitive, efficient and effective, and to improve revenue, retention and reputation in Gartner's view of the market.

Product or Service: Gartner evaluates the ability to offer a broad range of network services, including breadth of WAN services, managed SD-WAN, cloud connectivity, network on demand and uCPE/NFV/SASE services. We consider offering capabilities and differentiation across service breadth, vendor support, global consistency, competitive SLAs and customer experience categories.

Overall Viability: Viability includes an assessment of the vendor's overall financial health, as well as its financial and practical success and the likelihood that the individual business unit will continue investing in the overall portfolio of services.

Sales Execution/Pricing: We evaluate the vendor's capabilities in all presales activities and the structures that support them. This includes deal management, pricing options, contract negotiations, presales support and the overall effectiveness of the sales channel.

Market Responsiveness/Record: We look at the vendor's ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the vendor's history of responsiveness to changing market demands.

Marketing Execution: We evaluate the clarity, quality, creativity and efficacy of programs designed to deliver the vendor's message to influence the market, promote the brand, increase awareness of offers and establish a positive identification in the minds of customers. This mind share can be driven by publicity, promotions, thought leadership, social media, referrals and sales activities.

Customer Experience: This criterion assesses how customers view this provider and the quality of customer experience delivered. The key components in this category are the provider's portal and service support responsiveness for enterprise customers, regardless of size or industry and customer feedback.

Operations: This criterion refers to the ability of the service provider to meet delivery commitments. Factors include quality of the organizational structure, skills, experiences, programs, systems and other vehicles that enable the vendor to operate effectively and efficiently.

Table 1: Ability to Execute Evaluation Criteria

Evaluation Criteria	*Weighting*
Product or Service	High
Overall Viability	Medium
Sales Execution/Pricing	High
Market Responsiveness/Record	High
Marketing Execution	Medium
Customer Experience	High
Operations	Medium

Source: Gartner (March 2025)

Completeness of Vision

Gartner analysts evaluate vendors on their ability to convincingly articulate logical statements. This includes current and future market direction, innovation, customer needs, and competitive forces, and how well these map to Gartner's view of the market.

Market Understanding: This criterion assesses whether the vendor can drive/influence the direction of the market through development of roadmaps and offerings. It also looks at whether providers are focusing on building their core competencies with strategic enhancements, or if they are investing in random technologies.

Marketing Strategy: We assess whether the vendor's messaging and marketing campaigns effectively communicate how it differentiates in functionality and value proposition. We also evaluate whether the issues communicated meet the trends in the market and the needs of end users.

Sales Strategy: This criterion evaluates whether the vendor has a sound sales strategy, including direct and indirect sales, marketing, and communications. We also evaluate whether the vendor has partners that extend the scope and depth of its market reach, expertise, technologies, services and customer base.

Offering (Product) Strategy: We evaluate whether the current and planned future offerings meet buyers' needs now with differentiated functionality, and how the vendor will do so in the future. We also evaluate whether the provider is building additional features and expanding the offers that buyers are seeking or if it is lagging behind in this area? In addition, we look at whether the vendor is anticipating the issues that the buyer will face and allocating resources to address them.

Business Model: This criterion assesses whether the design, logic and execution of the vendor's business proposition demonstrate the ability to achieve continued success, along with evaluating if the business model meets the needs of the target market and enables the provider to grow.

Vertical/Industry Strategy: We evaluate whether the provider's strategy, direct resources, skills and offerings meet the needs of market segments, including vertical industries. In the network service market, we assess whether the vendor can differentiate itself with services that are specifically developed for the unique requirements of targeted verticals, such as healthcare, logistics, manufacturing, retail, hospitality and others.

Innovation: This criterion looks at what the provider has done to address the future requirements of network services, including the need for product breadth, additional vendor support, AI and automation investments, consistent portals, and ubiquitous offerings globally to solve clients' business problems. We also assess whether the vendor has successfully differentiated its current and future product lines to address customer requirements, both now and two to five years out.

Geographic Strategy: We look at whether the provider's strategy to direct resources, skills and offerings meets the specific needs of geographies outside its "home" or native

geography, as well as assessing if the provider meets the needs of global enterprises for product and support.

Table 2: Completeness of Vision Evaluation Criteria

Evaluation Criteria	*Weighting*
Market Understanding	High
Marketing Strategy	Medium
Offering (Product) Strategy	High
Vertical/Industry Strategy	Medium
Innovation	High
Geographic Strategy	Medium
Sales Strategy	Low
Business Model	Low

Source: Gartner (March 2025)

Quadrant Descriptions

Leaders

Providers in the Leaders quadrant are performing well and maintaining a stable organization, with a clear vision of market direction. They deliver comprehensive portfolios of quality network services across the broadest geographies. They address the global networking needs of a broad range of enterprises in terms of size, geographic distribution and vertical industry. Leaders shape the direction of the market by extending their coverage, developing new class-leading capabilities and commercial models, and deploying them at scale.

Challengers

Challengers are strong in execution but narrower than Leaders in their vision for taking market leadership. They focus more on established network services and geographies and are typically followers of the market innovations created by Leaders and Visionaries.

Visionaries

Visionaries have market-leading plans for the future in terms of geographic and/or network service innovation. However, their current capabilities are not class-leading in terms of scope and/or quality.

Niche Players

Providers in the Niche Players quadrant may focus on a particular segment of the market, as defined by characteristics such as size, vertical sector, geographic coverage or technology, and they may be strong providers for those requirements. However, they lack the capabilities to address the needs of the broader range of enterprises or the vision to significantly alter their position in the market.

Context

A reliable, agile, secure and high-performing WAN network is critical to support enterprise business operations. Digital business initiatives place increasing demands on the enterprise network to ensure reliability and performance and meet increased bandwidth demands of between 35% and 40% annually (see Note 1). As a result, enterprises find it challenging to design and operate their networks to support dynamic business requirements, including hybrid work and the acceleration of digital and cloud transformations.

Managed SD-WAN over the internet has become the predominant offering for new network deployments and major refreshes. Given continued enterprise concerns about security, service providers also are adding managed SASE offerings that integrate SD-WAN with security packages including a firewall, CASB, SWG and ZTNA, and often additional security services (DLP, RBI, MDR, etc.). At the same time, the virtualization of network edge functions, using nodal NFV and uCPE/VNFs, is commonly offered as an additional option. However, compared to core transport, it has received less attention from clients.

Enterprises with global networking needs can choose from a select group of providers and elect to use multiple providers across multiple regions (for example, use a different provider for the Asia/Pacific region than for Europe). This usually results in better price/performance versus a global, single-provider approach. Sourcing options include managed, co-managed or unmanaged network services, with more options of sourcing the underlay transport services separately from overlay SD-WAN and security. This type of strategy supports the needs of clients that prefer regionally sourced WAN transport managed by a global overlay provider.

Related to pricing, competition continues to drive down unit prices for global WAN services. However, in a market in which there are no meaningful price lists, enterprises should still use competitive procurement practices and strong negotiation tactics to obtain the best-priced solution, competitive SLAs and optimal contractual flexibility.

Market Overview

Gartner forecasts that the market for enterprise fixed data networking services in 2025 will exceed $139.2 billion, an increase of approximately 0.5% from 2023 for a 0.7% compound annual growth rate (CAGR) from 2023 through 2028. [1] Although the number of global network service providers (NSPs) that qualified to be included in this research has declined, many more providers are operating in the broader market, including aggregators, smaller or regional providers, and new delivery model providers (see **Look to XBaaS to Address Long-Standing WAN Challenges**). The market also includes pure-play managed service providers that own little or no network infrastructure but resell network services to enterprise clients.

Underlay Network Transport Trends

Gartner commonly sees where DIA and broadband are augmenting and often replacing MPLS. FWA (5G cellular or LEO as new options) is being introduced for redundancy, and Ethernet and wavelength services address clients' needs for private WAN services, offering higher reliability and bandwidth.

While MPLS offers high availability and stable performance benefits, depending on the geography and port size, it is priced at a premium compared to equivalent dedicated internet services. Clients still often prefer MPLS as the primary link for critical locations (such as between a traditional data center and cloud provider), or in places where internet

performance is poor or variable, or due to local regulations or geopolitical considerations. The net result is that WAN architectures now heavily rely on the internet, with a smaller number of higher-capacity MPLS and Ethernet services. Despite this evolution, carriers have not kept up; most still have deployed considerably more MPLS POPs than dedicated internet. However, this is changing. Some countries have already discontinued offering MPLS, with others beginning the process to ultimately do so. Clients in these markets with private WAN needs are turning to Ethernet instead.

Internet connectivity allows direct access to SaaS and other internet-centric sites, with options including DIA, wireline and 4G/5G wireless broadband. Another benefit is sourcing choice: DIA and broadband services can be sourced from multiple providers, while MPLS still typically must be sourced from a single provider. Gartner estimates that enterprise internet service spend will grow globally at a 3.5% five-year CAGR in constant U.S. dollars from 2023 through 2028. [1]

However, internet connections also bring additional challenges not found in private MPLS networks, including the risk of suboptimal routing and congestion due to oversubscription by some ISPs as the traffic traverses multiple providers. There are several ways of overcoming this, including:

- Sourcing all internet services from a single provider.
- Sourcing from federations of ISPs that offer controlled routing among their members.
- Network-based SD-WAN gateways terminating the SD-WAN tunnels and passing the traffic over the provider's backbone.
- Enhanced internet services optimizing routing through an ISP's backbone; however, to benefit, clients must only use that single provider. BT, Colt, NTT, Orange Business, Tata Communications and Vodafone offer these services, but most lack differentiated SLAs (versus each provider's regular internet service).
- Evaluation of service providers to ensure their internet POP footprint matches local access needs and verifying potential oversubscription levels as well as historic performance.

More NSPs rely on colocation facilities (e.g., Equinix, Digital Realty) to host their POPs instead of owning or leasing facilities. This can improve time to market and internal cost, compared to the traditional approach. However, the traditional approach (owning and

operating a POP in a city) demonstrates long-term financial commitment to that market and provides a carrier with absolute control of the location, available functions, etc. For the sake of resiliency, clients that use providers deploying a POP colocation strategy should make sure that the carrier uses diverse colocation providers in a particular market.

No provider has last-mile, on-network connectivity throughout the world. Carrier dependence on last-mile local access providers and the level of full automation used for orders, installation, MACDs and trouble resolution will vary by global-local provider pair per country. Clients should request specific information on this, especially for all sites of medium-to-high importance, as greater levels of automation provide greater levels of reliable performance and are often reflected in SLA details.

Enterprises' rapid adoption of cloud services is foundational to WAN architecture transformation. In response, global NSPs have expanded their cloud connectivity offerings (see **Choose the Right Private Connectivity Option for Your Cloud Needs**). All providers in this Magic Quadrant offer CBCI service, directly from their MPLS and Ethernet networks to the top three CSPs (Amazon Web Services, Google Cloud Platform and Microsoft Azure), as well as through third-party exchanges for greater reach and/or location diversity. The key differentiators are the number of individual cloud providers and cities where interconnections have been preestablished, and the ability to add virtualized services (such as security) into the cloud connection points.

Gartner estimates that enterprise spend on cloud connect services will grow globally at a 21% five-year CAGR in constant U.S. dollars from 2023 through 2028. [1] These CBCI services typically allow for capacity adjustments and, in some cases, add new cloud endpoints on demand via a portal and/or API control. CBCI also can be tied to network on demand services that allow customers to change bandwidth and make some policy modifications for individual MPLS, DIA or Ethernet connections.

Overlay Network Trends

New global WAN proposals are almost exclusively based on managed SD-WAN services, either proposing a hybrid mix of MPLS and internet, or all-internet-based underlay links. Global NSPs commonly offer a portfolio of three to six SD-WAN vendors to accommodate different client vendor preferences. In fact, Gartner requires that providers evaluated in this research offer strong integration with at least three SD-WAN vendors and demonstrate a strong global customer base. Providers that support many SD-WAN vendors (five or more)

may have limited integration with those vendors; consequently, there is less of an advantage for enterprises to work with NSPs versus any other over-the-top provider.

Many providers offer network-based SD-WAN gateways, allowing for easier SD-WAN migration, improved scalability and integration to third parties such as CSPs. Such gateways allow the network to combine internet access with the provider's higher-quality, long-haul backbones, greatly improving reliability and performance. A similar outcome can be achieved by using stand-alone enhanced internet backbone services on ISP federations. Managed SD-WAN services typically offer the option of local internet access from every site, which is especially useful for access to SaaS applications such as Microsoft Office 365. This avoids tromboning effects in SaaS traffic routing that add latency and possibly degrade performance. Perimeter security can be provided on-site or as a cloud-based service and is increasingly integrated as part of SASE services.

Global WAN service providers continue to enhance their managed SASE offerings using best-of-breed dual-vendor or single-vendor solutions. This can eliminate the need for an enterprise to service chain and orchestrate SD-WAN with network security functions, thereby simplifying management and, usually, offering better overall performance due to less complexity. However, NSP SASE-specific SLAs are embryonic at present and vary by SASE vendor. Thus, at this time, clients that engage with NSPs for this service are doing so for convenience, not for superior solutions. Be advised, however, that convenience typically comes at a premium price.

Network functions such as edge routing, SD-WAN, security, WAN optimization and visibility can be delivered as on-site appliances, but also can be offered as a uCPE/VNF. uCPE employs X-86 whiteboxes, which run multiple vendors' software instances, such as Broadcom (VMware) routing with Palo Alto Networks. Given the level of feature interaction between multiple software vendors, this option is most often offered as a managed service. Some providers allow customers to run their own software, including edge compute applications, on SD-WAN appliances and uCPE. In contrast, POP-based VNFs run in carrier nodes, making it easier to rapidly change the functions offered, and they are usually consumed as a service with a per-function monthly subscription fee. Popular VNF examples include vSBCs, performance monitoring and security functions.

Automation and Operational Trends

The level of complexity for global WANs continues to grow, especially when transport is a mix of MPLS and internet with cloud endpoints and a variety of backbone options plus SD-WAN and NFV technologies. In addition, the internet, especially using broadband or cellular access, is an inherently less predictable service than MPLS or Ethernet. Visibility capabilities — sometimes referred to as performance analytics — can help by enabling enterprises to see the actual performance of their connections and applications.

Provider enhancements have focused on performance reporting tools and portals, enabling the enterprise to have improved visibility at the network application layers. However, enhanced visibility does not quickly translate into improved performance SLAs, which continue to lag behind both enterprise expectations and requirements. To improve service responsiveness in an increasingly complex network, NSPs seek to increase use of AI/machine learning across the life cycle in design, ordering, provisioning, monitoring and billing.

In a trend we have seen developing over the last 12 months, many providers have begun adopting AI for IT operations (AIOps) and network automation for service onboarding and customer experience improvements. This is primarily for Days 0 and 1; comparably few have yet employed AI for Day 2 activities to provide predictive analytics for service improvement and minimal downtime (see **Predicts 2025: AI and Generative AI Technologies in CSPs**).

NSPs remain focused on improving their installation and service initiation lead times, although they are constrained by third-party/local access providers' lead times. Cellular service data speeds are increasing, making it more useful as an interim rapid deployment solution while awaiting permanent, fixed connectivity. In addition, cellular connectivity provides a truly diverse backup option. However, the hype around 5G cellular as a fixed connectivity replacement should be treated with caution, as both SLAs and coverage gaps continue.

Sourcing Trends

Providers are increasingly focused on providing the managed network service overlay platform, typically using SD-WAN and, increasingly, SASE, which can be delivered from cloud-native platforms or (less frequently) using NFV/uCPE. As noted, providers are more willing to support BYOA and other flexible sourcing approaches for the underlay network transport components.

However, the majority of enterprises still buy most of their underlay services from their overlay provider, especially when using a mix of MPLS and internet access. Global WAN service providers are moving toward software-based network services that emphasize visibility and self-service via portals and APIs. In addition, some providers tout newer NaaS offerings (see **Market Trend: CSP NaaS Offerings for Enterprise Networking**); to date, these largely reflect the capabilities already supplied by managed network services. These are not a la carte services. Since they are highly bundled, NaaS currently only appeals to a small subset of enterprise customers.

We continue to see incremental improvements in provider contracts, especially around the right to cancel in the event of chronic breach, on-time delivery guarantees, and commitments for proactive notification and fulfilling timely change requests. Willingness to respond in a timely fashion and negotiate terms and conditions can often differentiate a provider during the selection process.

Managed Service Trends

Most NSPs deliver global WANs as a managed service, with the on-site devices such as routers and security appliances provided and managed by the service provider. Transport links are usually sourced from the NSP, which has complete operational responsibility. The U.S. market remains unique in that, although many U.S.-headquartered multinationals rely on managed network services, a significant number still manage their networks in-house and own their CPE, with network underlay sourced from global providers.

At the same time, more WANs are moving to a co-managed reality because more network functions — such as SD-WAN application policies, security policies and NoD bandwidth — are controllable by the enterprise via the provider's portals and APIs. A benefit of this approach is that it opens the door for co-managed service options, allowing enterprises to oversee aspects of the network, such as application and security policies, to meet specific business requirements. In this case, responsibilities for various network management functions are divided between the provider and the enterprise. This is especially true when network perimeter security functions are integrated into the SD-WAN solution (SASE), where a separate organization will often control the security policies and actions. Co-management options vary by provider and usually are not priced substantially less than fully managed offers.

⊕ Evidence

Note 1: Internet Traffic and Capacity

Annual demand growth has decelerated slowly, but according to new data from TeleGeography's Transport Networks Research Service, [2] aggregate demand more than tripled between 2019 and 2023 to reach an eye-popping 5 Pbps. On a regional level, most parts of the world have seen very comparable growth at about 35% to 40% CAGR since 2019.

⊕ Evaluation Criteria Definitions