

# Cloud and Datacenter Networks

IDC's *Cloud and Datacenter Networks* service provides continuous market data and analysis of the worldwide markets for datacenter and multicloud networking, including software, hardware, and cloud services, with emphasis on new AI workloads. As applications migrate to public clouds, the datacenter and its network are becoming increasingly distributed, driving a need for scalable architectures, declarative policy-based automation, simpler operations, better abstractions, and seamless operation with public clouds. This service provides research and analysis on how these trends are reshaping the datacenter and multicloud networking markets.

## MARKETS AND SUBJECTS ANALYZED

- Datacenter network infrastructure and AI impact
- Ethernet switching in the datacenter and AI impact
- Multicloud networking and AI impact
- Automation of datacenter networks
- Application delivery network infrastructure
- Service mesh technologies and AI impact
- Datacenter network spending, segmented by technology/region
- Growth of bare metal ODM/white-box switching
- Detailed market forecasts and enterprise buyer insights
- Network disaggregation, including open source network operating systems such as SONiC
- Software-defined networking (SDN) and intent-based networking
- IaaS networking (network services provided by IaaS cloud giants)
- Networking for converged and hyperconverged infrastructure
- IDC Innovators documents on networking start-ups
- Evolution of open source networking technologies
- Software-defined WAN (SD-WAN) markets and technologies
- Key industry partnerships and alliances in datacenter networking

## CORE RESEARCH

- Datacenter Network Forecast and Analysis
- Datacenter Switching Forecast and Market Share
- Application Delivery Controller Forecast and Analysis
- Datacenter SDN/IBN Forecast and Analysis
- Multicloud Networking Forecast and Analysis
- Service Mesh Technologies Forecast and Analysis
- Market Assessments and Forecasts for IaaS Networking
- IT Buyer Studies: Deployment of Datacenter/Multicloud Networking
- Datacenter/Multicloud Network Customer Requirements
- SD-WAN Forecast and Analysis

In addition to the insight provided in this service, IDC may conduct research on specific topics or emerging market segments via research offerings that require additional IDC funding and client investment. To learn more about the analysts and published research, please visit: [Cloud and Datacenter Networks](#).

## KEY QUESTIONS ANSWERED

1. What are the greatest growth opportunities for datacenter network infrastructure vendors (AI and other fast-growing workloads) in on-premises datacenters and public clouds?
2. As hybrid IT and multicloud proliferate, what challenges and opportunities are available to established vendors, cloud providers, and start-ups?
3. What are enterprise requirements for multicloud networking?
4. How and where will public clouds continue to impact the datacenter network landscape, driving new innovations and best practices?
5. What IaaS networking services from cloud giants will have the greatest market impact?
6. How will buying centers change as multicloud networking and cloud-native technologies gain wider adoption?

## COMPANIES ANALYZED

IDC's *Cloud and Datacenter Networks* service reviews the strategies, market positioning, and future direction of providers in this market, including:

A10 Networks Inc., Accton/Edgecore, Alibaba Cloud, Alkira, Amazon Web Services (AWS), Arista Networks Inc., Array Networks Inc., AT&T Inc., Aviatrix, Broadcom Inc., Celestica, Cisco Systems Inc., Citrix Systems Inc., Dell Technologies, Delta (DNI), Digital Realty, Equinix, Extreme Networks Inc., F5 Inc., Fortinet, Google Cloud, Hewlett Packard Enterprise (including Aruba), Huawei Technologies Co. Ltd., IBM (including IBM Cloud and Red Hat), Intel Corp. (including Barefoot Networks), Juniper Networks Inc., KEMP Technologies Inc., Marvell Technology, Microsoft Corp., Nefeli Networks, New H3C Technologies Co. Ltd., Nokia Corp, NVIDIA, Oracle Corp., Pica8 Inc., Pluribus Networks Inc., Quanta, Radware Ltd., Riverbed Technology

Inc., Silver Peak Systems Inc., SnapT, Teridion, Verizon Communications Inc., Versa Networks, VMware Inc., and Volterra.