Managed Edge and Content Delivery Services

IDC's *Managed Edge and Content Delivery Services* CIS explores the role of service providers in delivering compelling rich media customer experience by integrating virtualization, programmability, MEC, media delivery, and security to develop innovative low-latency use cases. In a world where the customer's online experience is key to business success, enterprises need to incorporate strategies that align agile networking, edge compute, and rich media content delivery to create differentiation. The service evaluates the impact of virtualization and shift to the edge on service provider monetization strategies in the emerging managed edge services. It also provides market perspectives on transformational technologies such as SD-WAN, CDN, and edge; quantitative analysis of managed services opportunities; and competitive profiles of key players including communiction service providers, CDN providers, and hyperscalers. This service underscores the significance of data in motion, a key pillar of the future of connectedness.

MARKETS AND SUBJECTS ANALYZED

- Managed low-latency edge services
- Managed virtualized services (e.g., managed SD-WAN)
- Managed content delivery services (CDN)
- Multi-access edge compute (MEC)
- Programmability of the edge based on software-defined virtualized/container architecture and open APIs and underpinned with DevOps to speed service introduction
- Integration of security with SD-WAN, CDN, and edge compute

CORE RESEARCH

- Virtualization and Shift to the Edge: Managed Services
- IDC Market Glance: Worldwide Telecom, CY 2Q24
- Worldwide SD-WAN Managed Services Forecast, 2024–2028
- Virtualization and Shift to the Edge: Content Delivery Networks
- Worldwide Content Delivery Networks Market Forecast, 2024–2028
- Worldwide Content Delivery Networks Market Shares, 2023
- Market Analysis Perspective: Worldwide Content Delivery Networks, 2024
- Vendor Profiles
- U.S. Enterprise Communications Services Survey: Content Delivery Networks, 2024
- Market Analysis Perspective: Managed Edge Services, 2024
- U.S. Enterprise Communications Services Survey: SD-WAN, 2024
- Managed Edge Services Forecast, 2024-2028

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: Managed Edge and Content Delivery Services.

KEY QUESTIONS ANSWERED

1. What are enterprises' key requirements and priorities for edge services, SD-WAN, and content delivery?
2. How are telcos and CDN players exploring edge strategies and monetization opportunities?
3. What are industry alliances, standards bodies, and public cloud providers doing to define edge architecture, edge platforms, and use cases?
4. What are the low-latency use cases that will require managed edge services using 5G (e.g., video streaming, IoT applications)?
5. What vendors and service providers are leading in MEC innovation?
6. What is the market opportunity for MEC services?
7. What is the impact of managed edge services on SD-WAN and CDN?
8. What key technologies enable innovation of managed edge services?
9. What is the role of programmable edge to drive service provider innovation and differentiation?

COMPANIES ANALYZED

This service reviews the strategies, market positioning, and future direction of several providers in this, including:
Akamai Technologies, Amazon.com, AT&T Corp., BT EMEA (Tier 1), Cisco Systems, Comcast, Cox Communications, Edgio, Ericsson EMEA (Tier 1), F5 Networks, NTT Communications (Japan), Orange SA EMEA, Red Hat, T-Mobile US, and Verizon.