ISG Provider Lens™

Software Defined Networking & Services

Managed SD – WAN Services

U.S. 2018

Quadrant Report

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

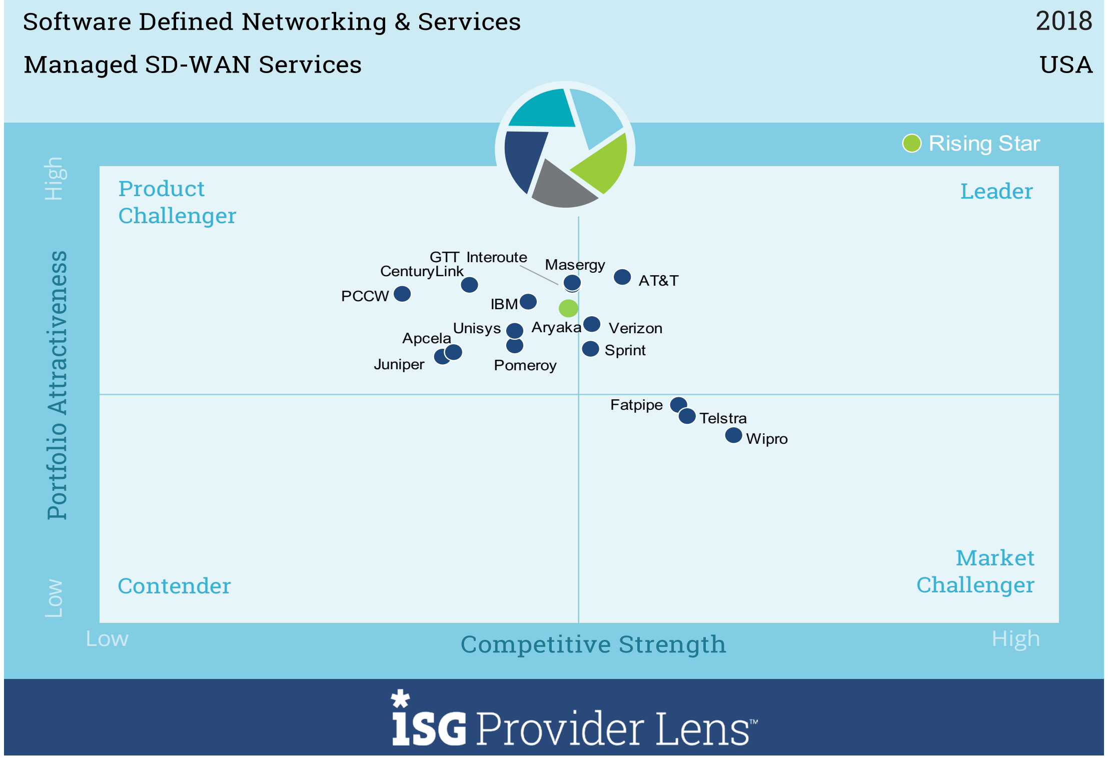
Sprint Business

June 2018

MANAGED SD – WAN SERVICES

Definition

Managed SD-WAN services cover the features and functionality carriers offer in their wide area networks (WAN) and at the customer point of demarcation. They may be considered a direct alternative to "traditional" managed WAN services. Many enterprises see managed SD-WAN services as a way to outsource IT functions and purchase them along with consulting and professional services to assess, design and implement their enterprise networks, while taking advantage of the benefits offered by software-defined networks. Many enterprises have also expressed interest in using forms of managed SD-WAN as an interim solution to allow them to receive immediate benefits of SD-WAN technologies and methods, while reducing learning curves within their own enterprise to do so. In these cases, "Plan, Build, Run" (PBR, and also evaluate, transfer back to the enterprise) or "build, operate and transfer" procurement scenarios often have been discussed.



Source: ISG Research 2018

MANAGED SD – WAN SERVICES

Definition (cont.)

SD-WAN provides the benefits of SDN technologies to traditionally hardware-based networking. It is an overlay architecture providing a networking foundation that is much easier to manage than legacy WANs. It essentially moves the control layer to the cloud and, in the process, centralizes and simplifies network management. This overlay design abstracts software from hardware, enabling network virtualization and making the network more elastic. SD-WAN architecture reduces recurring network costs, offers network-wide control and visibility and simplifies the technology with zero-touch deployment and centralized management. The key to the SD-WAN architecture is that it can communicate with all network endpoints without the need for external mechanisms or additional protocols.

Managed SD-WAN suppliers have been increasingly active as both managed network services providers (MNS), as well as supplying complete and partial solutions to other traditional MNS companies in partnering deals. MNS providers have been aggressively marketing complete SD-WAN solutions as managed service packages to enterprises as replacements or alternatives to traditional managed WAN solutions. Although still in the early stages of adoption, SD-WAN is expected to have a high take-up by enterprises that are seeking a managed service alternative to their WANs during 2018-21.

SPRINT

Overview

Name of Product/Service: SD-WAN Complete, SD-WAN Co-management, SD-WAN CPE offerings

Strengths

Sprint has a long history of competing for market share within U.S. enterprises across the networking products spectrum, including the highly competitive mobile business areas. It has compiled an impressive portfolio recently of SD-WAN related products and services and is fully capable of delivering these as managed services via its managed services business area.

Sprint has protected its strategic contracts through competitive pricing and improved services recently. It also embraced the adoption of SD networking products and managed services. This, in addition to its indubitable experience in the marketplace, coverage, footprint and mobile heritage, has allowed Sprint to enjoy an advanced position compared to many competitors.

Caution

Sprint's growth in SD networking began with pilots and POCs with existing clients and, though a bit late to market, it has expanded into numerous production-level customer deployments.

Sprint is perceived much more as a wireless/mobile-driven provider in comparison to many of its competitors. While that perceived positioning is a benefit in many ways, fiber and traditional cabled networks and access must be equally promoted for Sprint to gain or retain the attention of many enterprises.

Sprint's progress into an advanced position in the overall market must be sustained. Pricing and product portfolio challenges, together with increasing entrants and competition from companies with good pedigree who are also able to deliver managed SD-WAN may result in erosion to its leadership position over the coming 12 to 24 months.

2018 ISG Provider Lens™ Leader

Sprint is well-placed competitively, has a strong pedigree in SD networking and mobility products and is a recognized supplier in the U.S. market.

METHODOLOGY

The research study "ISG Provider Lens™ 2018 Software Defined Networking & Services" Quadrant Report analyzes the relevant software vendors/service providers in the U.S. market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology. The study was divided into the following steps:

1. Definition of the Software Defined Networking & Services target market

2. Use of questionnaire-based surveys of service providers/vendor across all trend topics

3. Interactive discussions with service providers/vendors on capabilities and use cases

4. Leverage ISG's internal databases and advisor knowledge and experience (wherever applicable)

5. Detailed analysis and evaluation of services and service documentation based on the facts and figures received from providers and other sources.

6. Use of the following key evaluation criteria:
   - Strategy & vision
   - Innovation
   - Brand awareness and presence in the market
   - Sales and partner landscape
   - CBreadth and depth of portfolio of services offered
   - Technology advancements

Authors and Editors

Dr. Kenn Walters, Author

Global Lead Analyst, ISG Research

Kenn is a thought leader and practitioner in networks, smart infrastructure and services and application of advanced technologies globally. Authoring and lead analyst of Software Defined Networking and Digital Transformation IPLs, as well as authoring multiple ISG Insights. He supports clients with customer engagement activities and events on SDN, Future Networks, ICT Network Services, IoT, Smart Cities and Infrastructure, Mobile Enterprise client strategies, Digital Transformation, market development and trends. Kenn is a known expert in these fields in many countries internationally, with over 40 years of experience in the ICT sector.

Jan Erik Aase, Editor

Director

Jan Erik Aase is a director and principal analyst for ISG. He has more than 35 years of collective experience as an enterprise client, a services provider, an ISG advisor and analyst. Jan Erik has overall accountability for the ISG Provider Lens™ reports, including both the buyer-centric archetype reports and the worldwide quadrant reports focused on provider strengths and portfolio attractiveness. He sets the research agenda and ensures the quality and consistency of the Provider Lens™ team.

ISG Provider Lens™ | Quadrant Report
June 2018

ISG (Information Services Group) (NASDAQ: III) is a leading global technology research and advisory firm. A trusted business partner to more than 700 clients, including 75 of the top 100 enterprises in the world, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; technology strategy and operations design; change management; market intelligence and technology research and analysis. Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,300 professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data.