

**\*ISG** Provider Lens™

# Software Defined Networking & Services

Managed WAN Services

U.S. 2018  
Quadrant  
Report



A research report  
comparing provider  
strengths, challenges  
and competitive  
differentiators

Customized report courtesy of:



June 2018

## MANAGED WAN SERVICES

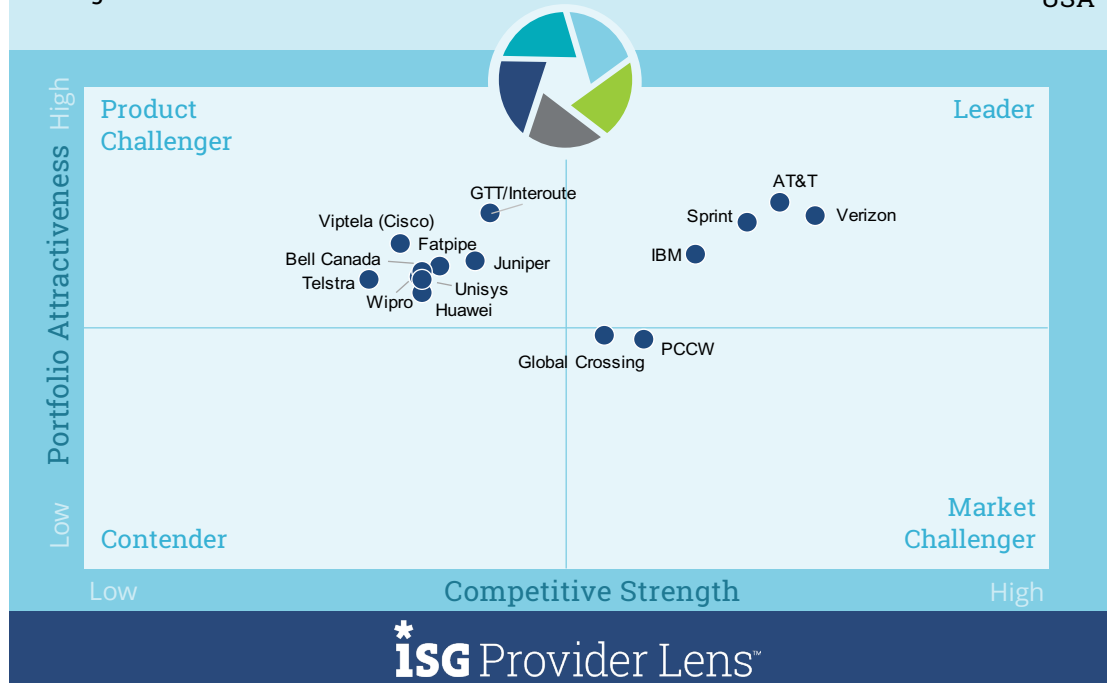
### Definition

Managed WAN services are increasingly being described as “traditional” managed WAN services in light of the SD-WAN offensive globally. A managed wide area network (WAN) covers the features and functionality carriers offer in their network and at the customer point of demarcation. These are a collection of value-added services that can include monitoring and reporting, security and outsourced customer premise equipment (CPE) functions. Many enterprises see managed 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.

At a basic level, carriers’ managed WAN services offer monitoring and alerts for critical problems such as network outages, plus configuration management, proactive troubleshooting and trouble resolution, SLA management, on-the-ground equipment installation, hardware support and overall lifecycle management..

Software Defined Networking & Services  
Managed WAN Services

2018  
USA



Source: ISG Research 2018

## MANAGED WAN SERVICES

### Definition (Cont.)

Managed WAN services by respective service providers offer the scope of services and functionality of various network solutions, often including core solutions such as the MPLS protocol for IP-VPN services and multiple-access technology. WAN services allow end customers to access resources for NOCs, disaster recovery, active fault clearance and customer portals.

Traditional managed WAN services, often based around MPLS, have come under increased pressure over the last 24 months due to the promise of SD-WAN; this trend looks set to continue over the next 24 months. MPLS is the most widely used WAN technology in companies with distributed locations and has developed continuously. For example, today it is possible to prioritize types of applications depending on their respective jitter, packet loss and deceleration to allow individual applications to be accelerated, based on customer requirements or policies. While MPLS VPNs provide certain advantages as an option to connect locations, they are an expensive medium

when it comes to connecting mobile devices, especially since the growth of traffic that is not business critical is exploding due to the IoT. The increasingly mobile workforce and decentralised locations within enterprises also contribute to mobile traffic growth. In addition, enterprises are demanding more flexibility and business-oriented result SLAs metrics from the network than ever before, such as performance per application and quality of experience (QoE). Such demands are resulting in strain and threatening the smooth running of traditional WAN services and managed services. Often, it becomes apparent that these newer flexibility and metric requirements require a more flexible infrastructure than MPLS networks can provide alone. Thus, software-defined networking becomes increasingly relevant.

ISG does not foresee MPLS networks being replaced by alternate software-driven networks any time soon; however, ISG does see MPLS networks increasingly being complemented by SD-WAN technologies in the period 2018-2021.

## SPRINT

 Overview

Name of product/service: SD-WAN Complete, SD-WAN Co-management, Managed Network Services

 Strengths

Sprint has a long history of competing for market share within U.S. enterprises across the networking products spectrum, including in managed services and managed WAN. It has compiled an impressive list of clients, partly driven by its wireless and mobile business initiatives, and has retained a commitment to its existing managed WAN clients.

Sprint has competitive pricing and has recently expanded its service and management portfolio, while improving upon referenced client delivery and quality. This, in addition to the company's indubitable experience in the marketplace, coverage, footprint and mobile heritage, allows it to enjoy an advanced position compared to many competitors.

 Caution

Even though Sprint has a broad portfolio of wireline networking solutions and a wireline business unit with executive leadership, product development, sales and sales support resources focused on selling and growing their wireline portfolio, Sprint is perceived as a “wireless/mobile-driven” provider in comparison to many of its competitors. While offering a suite of wireline and wireless converged solutions is a benefit in many ways, fiber and traditional cabled networks and access must be equally promoted to gain (or retain) the attention of many enterprises and to assist in converting clients (when required) to managed SD-WAN.

Sprint's progress into an advanced position in the overall market must be sustained. Pricing and product portfolio challenges from competitors, coupled with a potential spurt of migration to SD-WAN over the next two years, may prove challenging.



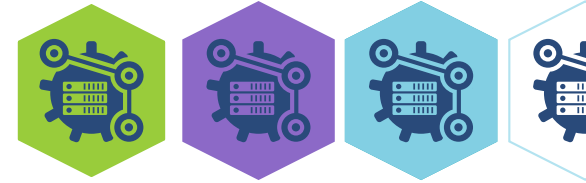
## 2018 ISG Provider Lens™ Leader

Sprint is well placed competitively, has a strong pedigree in managed WAN and networking 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



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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.

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