

Is SDN ready for the Enterprise?

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Today's SDN market is a free for all

ovum

the Wild West 365



The emerging 'storyline' has drama

Good



A righteous mission to transform network dynamics, economics and value chains

Bad



Legacy vendors with billions to win or lose, and their own flavor of SDN to promote

Ugly

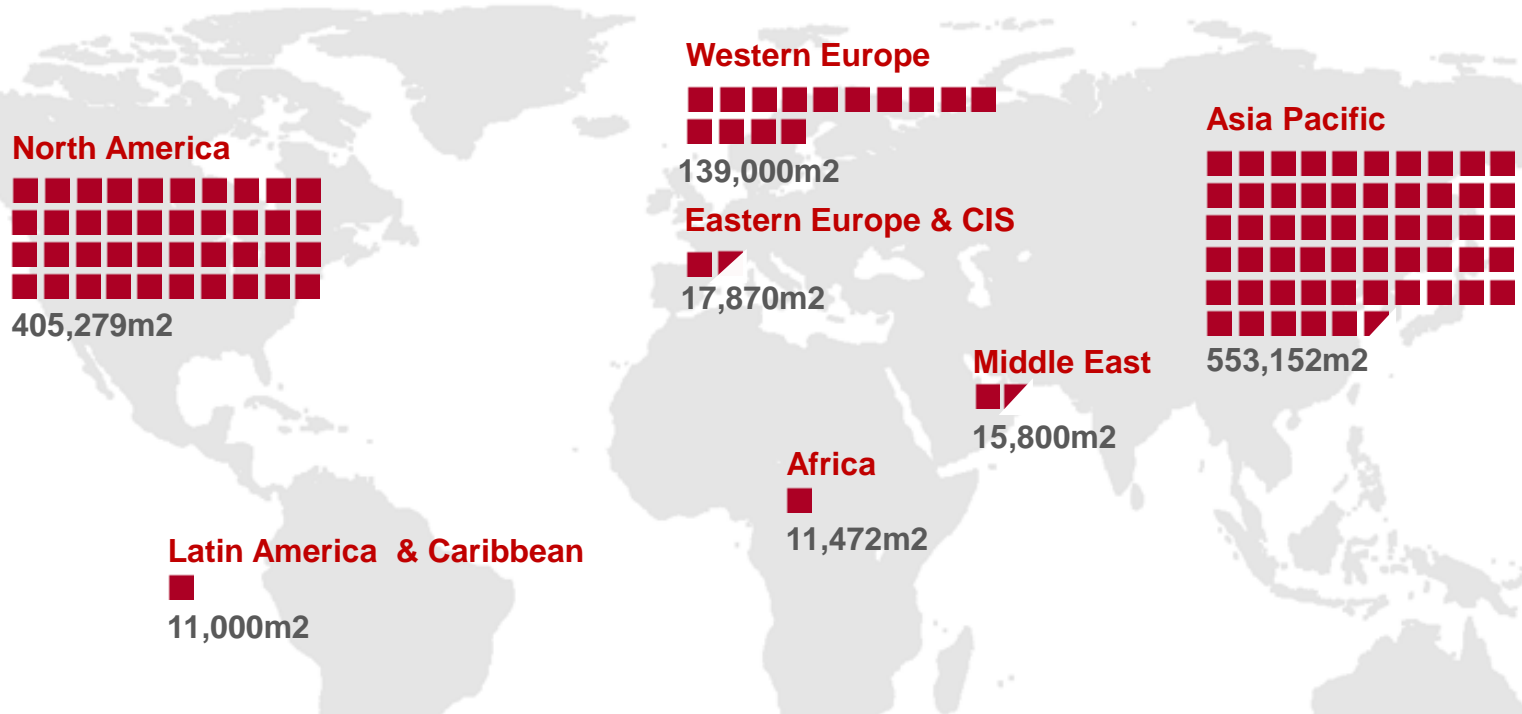


Market anarchy and confusion as legacy and upstart vendors jostle to set the rules

Telcos have stolen the SDN limelight



Telcos: datacenter space under construction or acquired, 2010-14



KEY
■ = 10,000m2

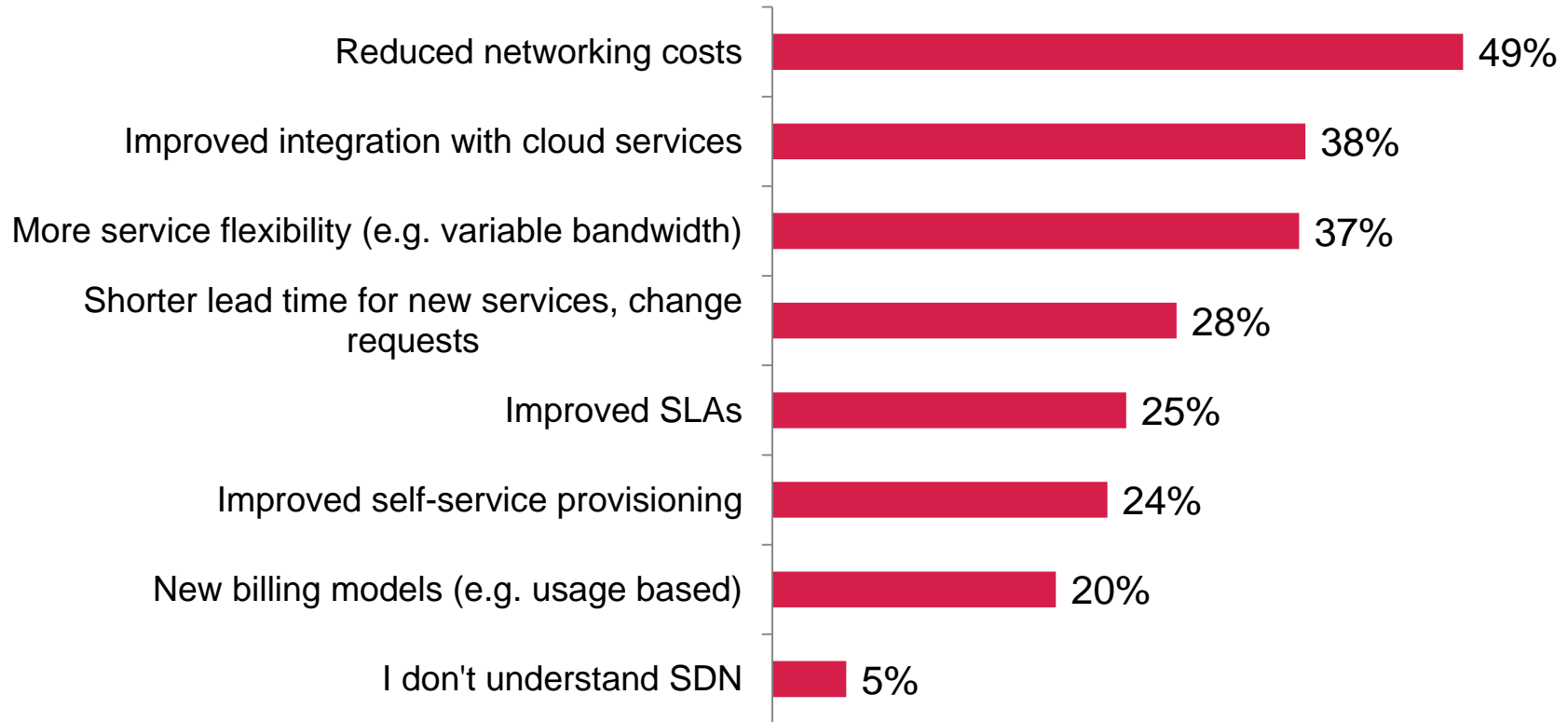
1H for 2014.
Source: Ovum Telecom Cloud Monitor

Telcos are building 46 soccer pitches of datacenter space a year. They buy into the software-defined networking vision. To them, SDN is the glue bonding today's business (the network) with tomorrow's (the cloud).

What do enterprises expect to gain from SDN?



Enterprises: Most important benefits of SDN



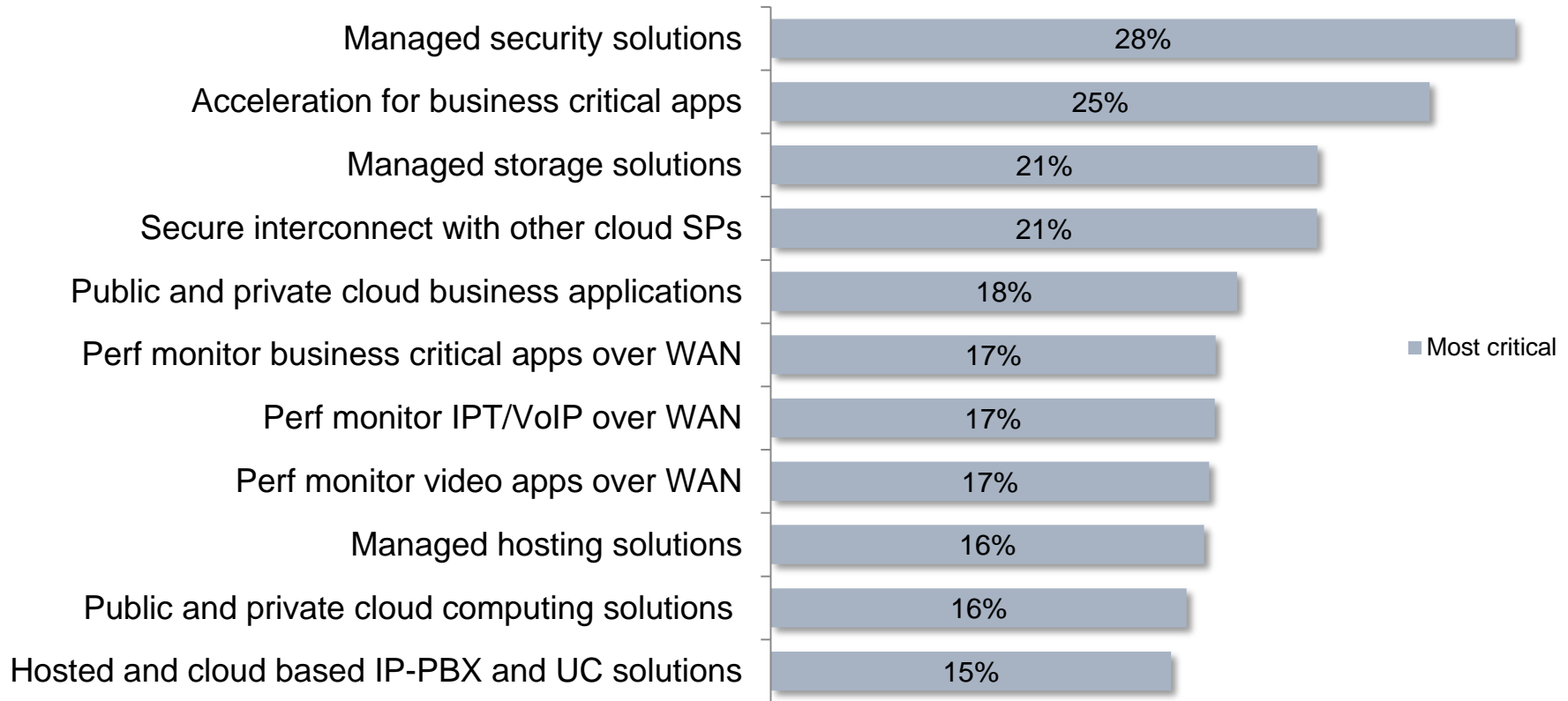
Source: Ovum. Customer Insights data from Enterprise Insights analyser including 2,700 ICT decision makers, survey carried out in July 2014.

The disconnect: Enterprises are conscious of (some) SDN benefits – but let's not forget their extended infrastructure renewal cycles, nor 'FUD' factors.

What do enterprises want from telcos?



Enterprises: Differentiating service provider capabilities



Source: Ovum. Customer Insights data from Enterprise Insights analyser including 2,700 ICT decision makers, survey carried out in July 2014.

Capabilities of the service provider infrastructure and the enterprise's infrastructure must be aligned, as hybrid cloud environments will dominate.