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Executive Viewpoint 2015 Prediction: ADARA Networks - A Tale of Two Markets: How a Growing Mid-Market will Impact SDN in 2015

By Karthikeyan Subramaniam (Profile)

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Advanced

While the final numbers aren't in yet, 2014 will surely have been a big year for software-defined networking. Most analysts agree that the growth we saw in 2014 is just the beginning. A report released by The Rayno Report predicted that open technologies serving as the foundation for SDN and NFV will bring about the biggest shift in networking in 20 years, creating at least another \$20B in value with the opportunity to create more than \$50B. As more organizations move from considering SDN to actually implementing SDN, we have seen a shift in how SDN is marketed, developed and implemented. Much of this shift has to do with the differing needs and wants of small and medium sized enterprises versus the large enterprises. In 2015—as small and medium sized organizations make up a growing percentage of SDN implementations—we'll see two very different approaches emerge from SDN vendors to meet the needs of these two groups.

Traditionally, SDN has been the domain of the large enterprise. In the past few years SDN vendors have—wisely—spent a great deal of effort educating small and medium size businesses about the benefits of SDN. In 2015, these smaller enterprises will be ready to jump in. Most small and medium sized enterprises begin their SDN journey by implementing on-demand automation and provisioning to reduce IT costs and improve productivity. But, as opposed to their large enterprise counterparts, they want a plug-and-play solution that can be implemented quickly and with minimal IT resources. On the other hand, large enterprises will continue to take a Lego approach to SDN—using a combination of products they develop in-house to work with legacy gear—and open source products that offer a cheaper alternative to traditional hardware resources.

Vendors are moving quickly to meet the needs of small and medium sized enterprises—embracing open standards and standard protocols with zeal. We are seeing many traditional and SDN vendors either abandon their proprietary approach or complementing it with open standards products. Small and medium size enterprises are demanding well-tested, fully-integrated bundled solutions that include, hardware switches, controllers, hypervisors and orchestration software. Those vendors who offer complete and easy to implement solutions will be sure to get more traction and success with this growing customer-base. Vendors that continue to take the piecemeal approach that has been the norm up until now, will not. As a result, in 2015, we will see an ever increasing number of vendors working together to create partner ecosystems that provide a turnkey bundle for their customers.

But, SDN vendors will not abandon the large enterprise anytime soon—they just demand a different approach. Because large enterprises have huge legacy infrastructures to contend with, it has been very difficult for SDN vendors to meet all of their requirements. As a result, large enterprises will continue to exploit the programmability of SDN so that they can build a custom solution for their one-of-a-kind infrastructure.

Up until now, vendors have taken a one-size-fits-all approach to SDN. Now that there are legitimate market opportunities with both small and large enterprises, we will see vendors start to narrow their development and marketing efforts towards

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one these market segments. In 2015, we'll see white box vendors focus on large enterprise customers whereas the orchestration and cloud vendors will gravitate towards small and medium biz. This focus and maturation of SDN is a positive step in the evolution of SDN technology and SDN vendors and one that will benefit enterprises of all sizes for years to come.



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