

**SD-WAN:**  
**THE KEY TO ENABLING**  
**MASS-MARKET ADOPTION**



# SD-WAN: THE CURRENT STATE OF PLAY

**The rapid growth of SD-WAN has created a market crowded with expensive off-the-shelf solutions from dominant vendors.**

Adoption around the world has been inconsistent. While a decent footprint has been established in the US - where businesses have actually championed a managed or co-managed services approach – markets in APAC and Europe have been slower to develop. With legacy MPLS access services cheaper and well-established, launching SD-WAN is considerably harder to justify in these regions than in North America, where the ROI is far clearer.

Available options that don't rely on installing an expensive, dedicated SD-WAN appliance from a major vendor have been limited. This has made it difficult for small and medium-sized players to create a commercially viable business case that would allow them to also adopt the DIY approach. Meanwhile, service providers (SPs) and managed service providers (MSPs) have often struggled to add SD-WAN to their portfolio of managed services, largely because demonstrating the ROI to customers has been so challenging.

**If, therefore, SD-WAN is to fulfil analyst expectations and reach USD 4.1 billion by 2023<sup>1</sup>, something needs to change. The market needs to evolve beyond hype and early adoption to become accessible to the mass market.**



<sup>1</sup> <https://www.marketsandmarkets.com/Market-Reports/software-defined-wan-market-53110642.html>

# MASS MARKET SD-WAN: WHAT'S THE HOLD UP?



## LACK OF FLEXIBILITY

Rarely do SD-WAN vendor appliances support the full range of connectivity and routing options. This means either traditional routers must remain and continue to run in parallel, or the customer must abandon the legacy services that are unsupported.



## (S)OS – MANAGING NEW SOFTWARE PLATFORMS

This leads neatly to the next major limitation. With a new appliance in place, internal resources must be dedicated to getting to grips with its operating system and then into managing the appliance itself. This two-box approach not only impairs flexibility but also creates new costs and management overheads.



## LEGACY LOVERS

No enterprise is asking to get rid of MPLS. Rather, they want greater agility and control over their application traffic management and cloud access. With many reluctant to make the leap, SD-WAN decisions have inevitably been delayed.



## PRICING OUT

Big brand off-the-shelf solutions invariably deliver far more functionality than the SMB and smaller enterprise either wants or needs. Nonetheless, this latent functionality is rolled into the bill, needlessly increasing TCO. When an SMB simply wants to extend its network with local break-out, it doesn't respond well to a 'take it or leave it' proposition.

# MASS MARKET SD-WAN: WHAT'S THE HOLD UP? (cont...)

## SERVICE PROVIDERS: MISSING OUT

For service providers, offering their own-branded SD-WAN solutions has been inaccessible and largely unconsidered; yet crucially, margin and relationship protection remain imperative to their continuity.

SPs need to ensure their chosen SD-WAN solution fits the needs of their customers, without compromising their existing services and business models. They are first to miss out on brand visibility and revenues when the SD-WAN vendor remains in control of the overlay via their own services. This loss of visibility and relationship control can also encourage enterprises to add-on other solutions independently, further eroding the SP's prospects with that customer. Integrating a white-label solution into their portfolio is a compelling means for SPs to take back control, boosting revenues while strengthening those all-important existing customer relationships.

## ENTERPRISES: IN THE DEEP END

Enterprises are typically faced with a choice between DIY and adopting a managed service. For many, however, this is no choice at all since they need to concentrate on their business and simply want to delegate IT and network as far as possible. Implementing network upgrades to a 'live' infrastructure is always challenging and most enterprises are reluctant to shoulder the responsibility or to sacrifice their legacy services, or both.

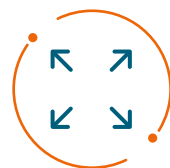
This leads them to a managed service approach. With critical business applications and security at stake, the experience, skills and guarantee of a managed service are appealing. If they are still able to define application prioritization and performance objectives, enterprises are typically happy passing over WAN management to a SP.



# SD-WAN WITH STRATEGY: EVOLUTION, NOT REVOLUTION

The SD-WAN market's complex dynamics dictate that a 'one-size-fits-all' solution simply doesn't work. Each service provider has different needs, as do each of their customers. That said, a more tailored, open and strategic solution is now emerging which enables a broader, mass-market approach, including SMBs and the smaller sites of large enterprises.

It begins with the development of a new equipment strategy. Instead of introducing new appliances and encouraging the abandonment of legacy services, an alternative approach is to focus on enhancing existing appliances to deliver tailored SD-WAN services in a modular, scalable, and accessible manner, according to the following factors:



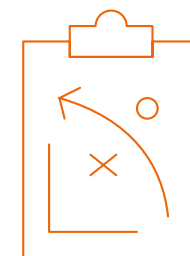
## CAPACITY PROJECTIONS

Developing clear capacity projections is key and should be a determining consideration when selecting a solution. An assured picture of required capacity will mitigate the risk of buying by-default from the big brands and paying for more than is required.



## FLEXIBILITY

The crux of reaching 'mass-market'. To keep pace with rapidly changing network demands, any SD-WAN solution should be easily programmable, scalable and adjustable. A zero-touch provisioning solution can be invaluable here, saving time, cost and the technical complexities associated with site intervention.



# SD-WAN WITH STRATEGY: EVOLUTION, NOT REVOLUTION (cont...)

## SECURITY

SD-WAN may be perceived as a security threat, as it leaves networks vulnerable to the threats of the Internet. The reality for many SMBs, however, is that often the door, if you like, was already open, but not under control. With SD-WAN, SMBs can take back control of their Internet connectivity and increase security.

SD-WAN must be considered as part of the overall security strategy, which can no longer be limited to simply protecting the Edge. The Secure Access Service Edge (SASE) model well defines various enterprise parameters to ensure adapted response to the threats. Ekinops SD-WAN offers a perfect complement to secure the Edge from network attacks. Traffic is micro-segmented and encrypted, while the enterprise is protected by preventing users from accessing unexpected content. All this operates without overlapping with other security services delivered from the cloud, meaning customers don't pay for duplicated features between solutions while protecting their networks.

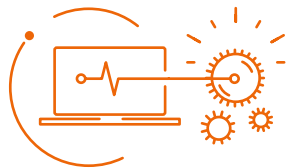


# SD-WAN WITH STRATEGY: EVOLUTION, NOT REVOLUTION (cont...)



## FUTURE-PROOF

For SPs and enterprises alike, removing the risk of vendor 'lock in' and ensuring solutions are scalable is important to safeguarding investment. Selecting a solution that champions openness can be invaluable. Using open technologies can significantly streamline certification, testing and re-certification programs too.



## CONTINUE TO SUPPORT LEGACY SERVICES

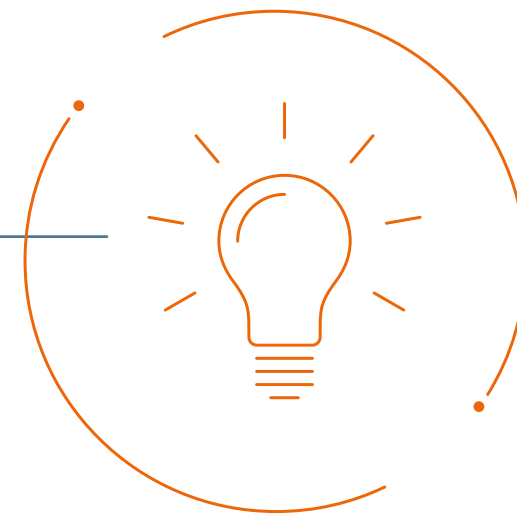
Reviewing a solution that can integrate into the core portfolio of carrier-grade legacy services enables a win-win for SPs and end customers: maintaining existing partnerships and business models while empowering customers to 'switch on' additional capacity, automation and application management when they need it.



## RESOURCING AND IN-HOUSE KNOWLEDGE

Enterprises and SMBs are increasingly time and resource poor. A managed SD-WAN solution takes the pressure off significantly, removing the need to get to grips with new systems and technologies.

As the first wave of SD-WAN excitement abates, the market is now starting to mature. Diversification, driven by specialists that really understand the operational and commercial context in which decisions are made, is enabling a more measured, more tailored and, frankly, more strategic approach to adoption.



# BUILDING THE BUSINESS CASE

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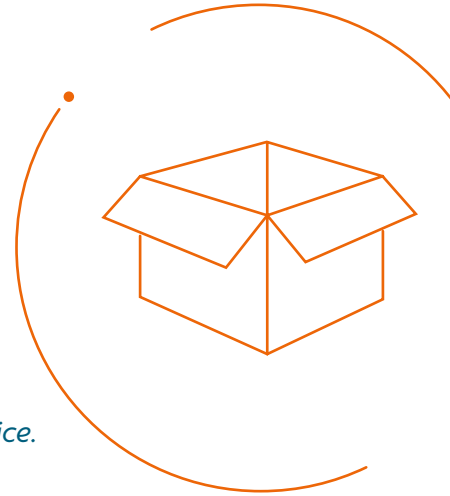
A 'one-box' approach, where SD-WAN becomes a function of a multi-service router, is central to making the technology accessible to SMBs and small sites of large enterprises. By integrating NFV and SD-WAN capabilities into their core network, SPs can continue delivering legacy services while empowering their customers to 'switch on' additional capacity, automation and application management when they need it.

## MINIMAL DISRUPTION AND INVESTMENT. MAXIMUM ROI.

For service providers, built-in SD-WAN makes particular sense. And with a unified OS, no great investment is needed internally to manage the solution. With enterprise customers both time and resource poor, offering SD-WAN as a managed service is a bona-fide win-win. By championing this 'one box' approach, the SP business case is easily assembled:

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- 1 **Tap into new revenue streams** delivering SD-WAN as a managed service.
- 2 **Maintain brand visibility and loyalty** by maximizing existing partnerships.
- 3 **Retain flexibility** with a modular, truly software-defined approach that can scale as you need and enable you to remain responsive to new requirements.
- 4 **Safeguard investment** by incorporating SD-WAN into standard hardware upgrades, all while maintaining legacy services too.
- 5 **Champion openness** to escape the limitations of vendor lock-in, fast-track innovation and retain agility. Using open solutions can also significantly streamline testing and certification processes. And, should customers wish, it also retains access to 'big brand' services.





## EKINOPS SD-WAN: A MATURE APPROACH

Ekinops is a trusted partner to service providers. It understands their unique pain points and has, throughout its history, delivered a rich portfolio of access and routing solutions tailored to meet these needs. Now, to empower them to maximize the market opportunity presented by SD-WAN, it has delivered the first SD-WAN solution available as an extension of a branch routing device. A true 'one-box' solution.

By leveraging a software-defined approach to enabling these services, service providers can evolve WAN offerings at a pace that suits them, with limited deployment complexity. In turn, reducing costs and time.



At the heart of Ekinops SD-WAN is OneOS6, its unique, overarching operating system. Totally open, it has been designed with usability and flexibility in mind to simplify application management and VNF deployment for service providers. Now, with SD-WAN functions built-in to the OneOS6 portfolio, it's available via simple license activation alongside Ekinops' extensive hardware and software portfolio. For Ekinops customers already with OneOS6-based CPE devices in the field, this means boxes are already primed to simply 'switch on' SD-WAN.

Ekinops introduces SD-WAN Xpress. It offers a radically more competitive pricing model compared to existing market leading solutions and focus on delivering the maximum value from digital transformation investment. In summary, making SD-WAN a low-cost and easy-to-deploy option for SMEs and small sites of enterprises for the first time.

***To learn more about Ekinops SD-WAN, visit our website.***

## THE NEXT CHAPTER...

Ekinops' new approach to SD-WAN is a radical break from existing deployment options. It is also a refreshing return to basics. By building on service providers' strong core portfolio of services and customer relationships, SD-WAN can finally start to benefit the mass-market. Service providers and their customers can harness the power of a digital transformation solution that champions evolution over network disruption.

**As 'network consciousness' continues to grow, so does the appeal of SD-WAN. For service providers, there has never been a better opportunity to get ahead of the pack.**



**SD-WAN**  
Xpress

# ABOUT Ekinops



**Ekinops360**

**ONEACCESS**

 **COMPOSE**

**Ekinops is a leading provider of open and fully interoperable Layer 1, 2 and 3 solutions to service providers around the world. Our programmable and highly scalable solutions enable the fast, flexible and cost-effective deployment of new services for both high-speed, high-capacity optical transport as well as virtualization-enabled managed enterprise services. Our product portfolio consists of three highly complementary product and service sets: Ekinops360, OneAccess and Compose.**

**Ekinops360** provides optical transport solutions for metro, regional and long-distance networks with WDM for high-capacity point-to-point, ring and optical mesh architectures, and OTN for improved bandwidth utilization and efficient multi-service aggregation.

**OneAccess** offers a wide choice of physical and virtualized deployment options for Layer 2 and Layer 3 access network functions.

**Compose** supports service providers in making their networks software-defined with a variety of software management tools and services, including the scalable SD-WAN Xpress.

As service providers embrace SDN and NFV deployment models, Ekinops enables future-proofed deployment today, enabling operators to seamlessly migrate to an open, virtualized delivery model at a time of their choosing.

A global organization, Ekinops (EKI) - a public company traded on the Euronext Paris exchange - is headquartered in Lannion, France, and Ekinops Corp., a wholly-owned subsidiary, is incorporated in the USA.

