


# FUTUREWAN'18

The **SD-WAN** Virtual Summit

Hosted by  CISCO

## The SD-WAN Waiting Game and the future of networking

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# Everyone is talking about SD-WAN

TELSTRA 

# So what are they saying?

SD-WAN adoption has grown from a handful of paying customers in 2014 to more than 2,000 today

Gartner, 2016

Spending on software-defined WAN products will rise from \$129 million in 2016 to \$1.24 billion in 2020

Gartner, 2016

Estimated to be worth just \$225M back in 2015, sales of SD-WAN technology are estimated to reach \$8.05bn by 2021

IDC, 2017



# SD-WAN evolution and the waves of change



## Wave 1

First generation hybrid WAN



## Wave 2

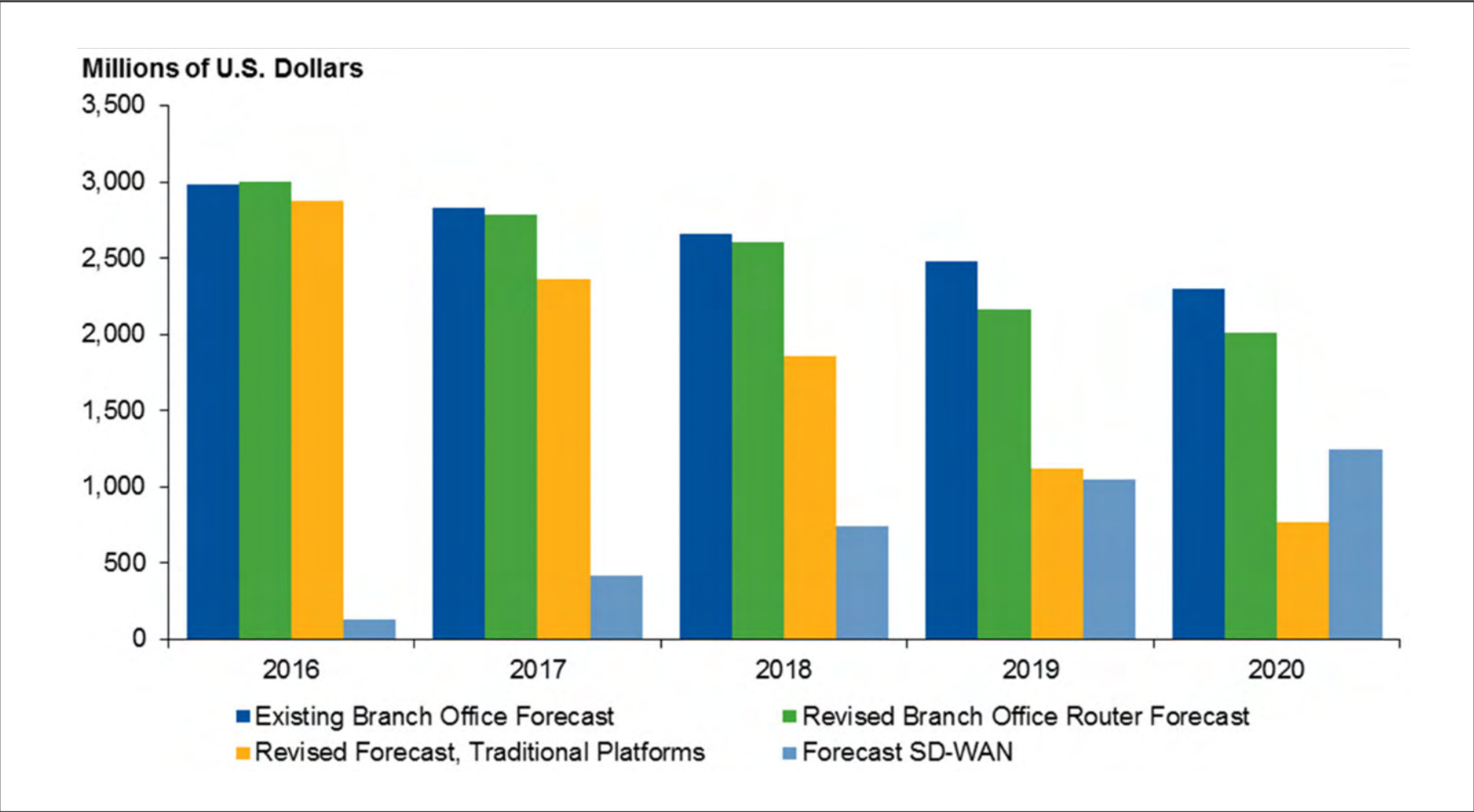
Automation, smart routing & performance



## Wave 3 **NOW**

- ✓ Extension of hybrid WAN
- ✓ Enabling the use of lower cost internet
- ✓ Bridging the gap of transition and transformation
- ✓ Potential for provider-agnostic overlay
- ✓ Centralised policy management
- ✓ Centralised and consistent reporting

# Market reflection



Source: Gartner (November 2016)

# WAN Optimisation (2015) to SD-WAN (2018)

Figure 1. Magic Quadrant for WAN Optimization



Source: Gartner (March 2015)



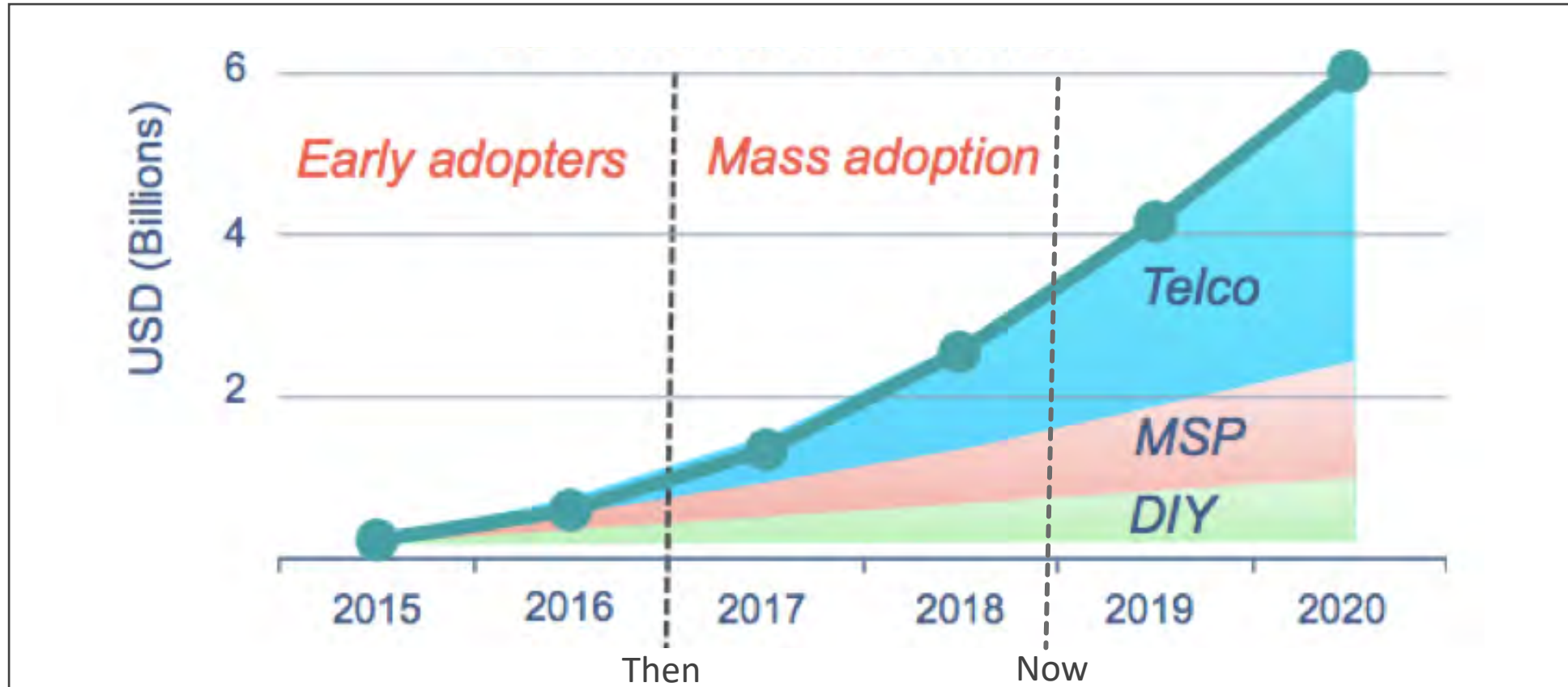
Figure 1. Magic Quadrant for WAN Edge Infrastructure



Source: Gartner (October 2018)

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# SD-WAN Market Evolution



Sources

- IDC: "Cloud and Drive for WAN Efficiencies Power Move to SD-WAN", doc # US41101416, May 2016
- Juniper Networks & PWC survey: GTM model layout

# The king is dead

- ✗ Lacks the agility and flexibility that digital organisations now need
- ✗ Making changes takes too long and is too costly
- ✗ Business critical, yet bandwidth intensive applications, are difficult to accommodate at an affordable cost
- ✗ Limited visibility of end-to-end network conditions and application performance
- ✗ Reliance upon error-prone manual configurations, long lead times and costly protocols



**MPLS**

Despite all of this, MPLS still has an irreplaceable role to play in the Enterprise network – for now

## Long live the king



# So what does the future of SD-WAN look like?



## Greater speed to market

Time to market with SD-WAN deployment will be achievable in a week or less



## Increase transport efficiencies

More efficient use of the available transport types by application, country and cost.



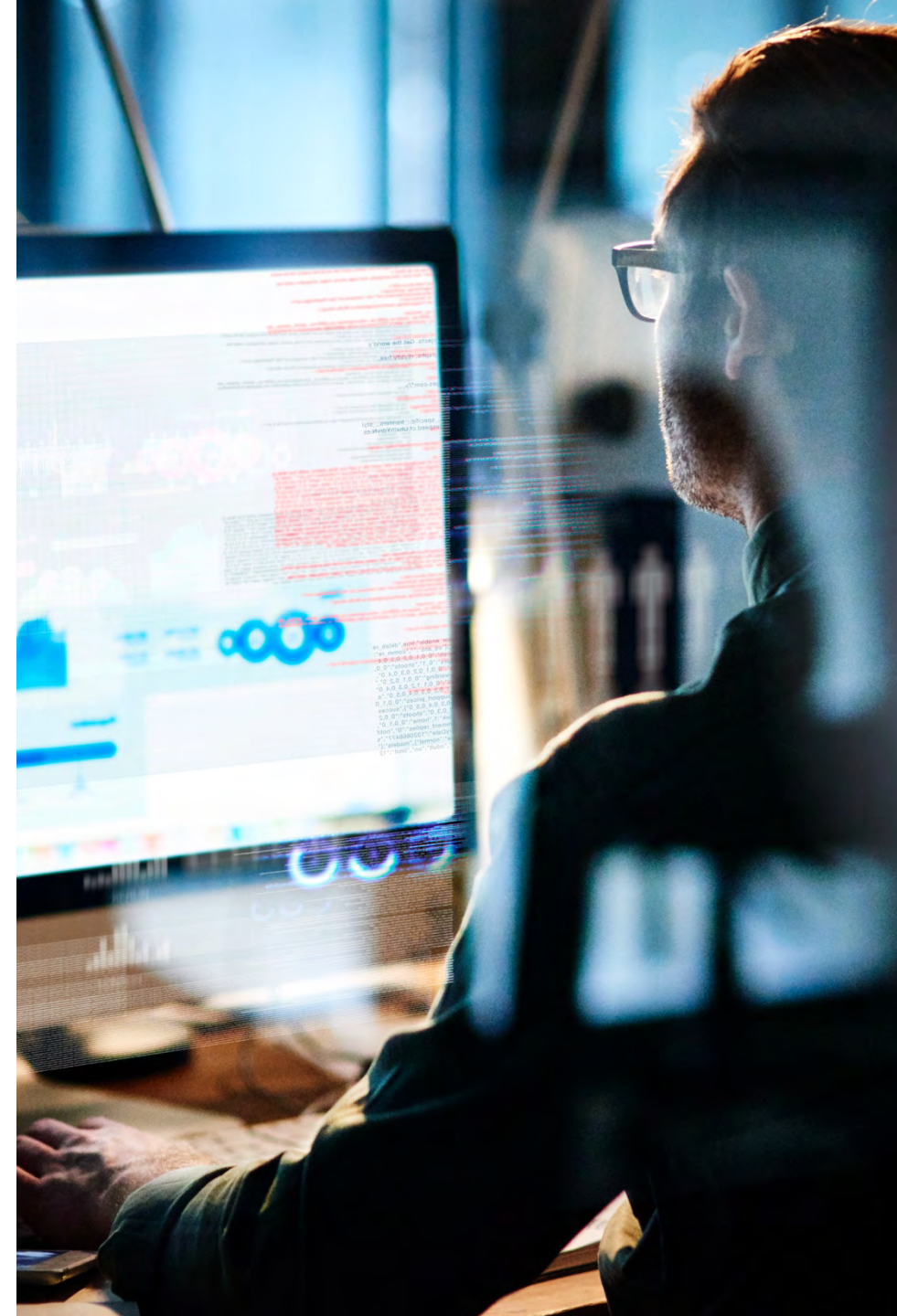
## Greater application visibility

Service Providers enabling application-based SLAs where they have end-to-end control



## Higher quality end user experience

Customised network characteristics, dynamic path selection and optimised load balancing to improve application performance



# Further Resources:

[Jump-start your understanding of SD-WAN](#)


[Why Telstra for SD-WAN](#)

# Next Steps

Contact us for more information  
[insight.telstra.com.au/sdwan](https://insight.telstra.com.au/sdwan)

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