SDN: Lots of Smoke. Any fire?

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In my last blog I discussed the growing trend away from hardware specific solutions and towards solutions that feature software running on generic hardware.   That trend took off several years ago with the introduction of server virtualization.   In today's environment it is difficult to read a trade magazine or go to a conference and not be bombarded by the latest step in that trend: software defined networking (SDN). I am going to use this blog to give you my assessment of where SDN stands in the minds of enterprise IT organizations.

Over the last month I moderated two all day seminars on SDN that were produced by Network World. One of the seminars was held in New York and the other in San Francisco. I kicked off each seminar and talked for about an hour. During my presentation I identified the varying ways that vendors define SDN, what they see as the value proposition and how they architect their solutions. One of my goals was to give a presentation that was as objective as possible in order to let the attendees make up their own minds about SDN. During the seminar, another industry analyst presented some market research that detailed the overall interest that IT organizations have in SDN. The seminar attendees also heard from a number of vendors, including NEC, HP and IBM. At lunch, the attendees had the opportunity to sit at a table with a vendor representative for a more one-on-one discussion of networking in general, and SDN in particular.

In each city, when the seminar started there were about 80 attendees and there were roughly 60 or so left after all of the formal presentations. The attendees didn't come from the hyperscale data center providers (e.g., Yahoo, Google) that get so much attention in the industry press. Rather, they came from very typical Fortune 500 companies. The conclusion that I drew from both the number of attendees and the companies that they represented is that SDN has crossed the chasm in terms of the interest that ordinary IT organizations have in the topic.

After the seminar attendees heard industry analysts and vendors discuss SDN, I put them into four breakout groups. Each group was given a question to answer and they were told to choose someone from their group to report back to the room with their conclusions. The four questions were: What would drive your company to adopt SDN? What would inhibit your company from adopting SDN? What would it take to sell SDN inside of your company? What, if anything, happened today during the seminar that surprised you?

In each city the conclusions that the four breakout groups reached were very similar. One conclusion that really stood out to me is that after hours of presentations, the attendees still didn't see a compelling use case for SDN. One attendee referred to the use cases presented by the sponsors as being *academic*. There was also general agreement that in order to sell SDN inside of their company, that there would have to either be a significant cost savings or some way that SDN added business value. Although the attendees

acknowledged that the vendors alluded to how that could happen, they didn't feel that they could go back to the office and make a convincing business case for their company to implement SDN. The attendees also expressed surprise that there was so little discussion of the management and security opportunities and challenges that are associated with SDN.

There is no doubt in my mind that we will continue to be bombarded by the ongoing discussion of SDN and that there is broad and growing interest in SDN on the part of mainstream IT organizations. However, there is also no doubt in my mind that a lot has to happen before we see mainstream adoption of SDN.

Over the next two months I will moderate two more SDN seminars for Network World, participate in a one-day tutorial on SDN at the forthcoming Open Networking Summit in Santa Clara and run a one-day workshop on SDN at the forthcoming Interop conference. After all of that is completed, I will write another blog and update what I see as the state of SDN adoption.