

Netcracker/Juniper Joint Solution Envisions a Whole New Class of LAN/WAN Orchestration

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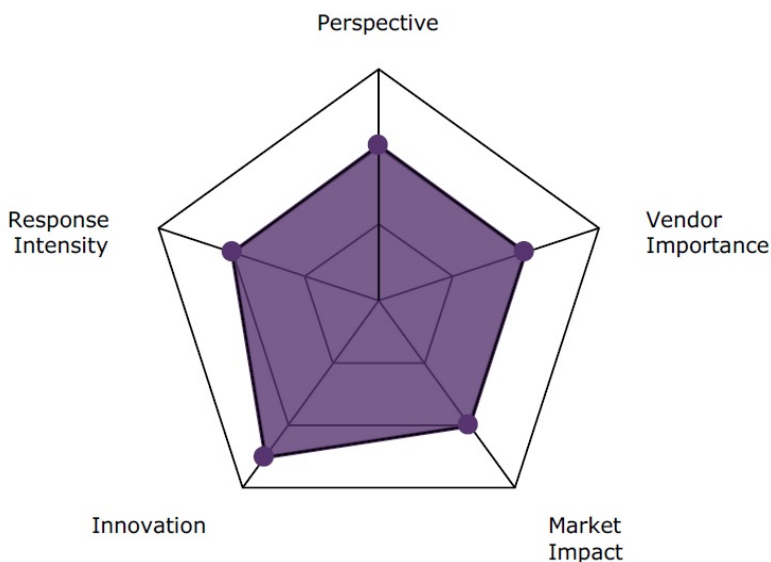
INTELLIGENCE ALERT

REPORT SUMMARY

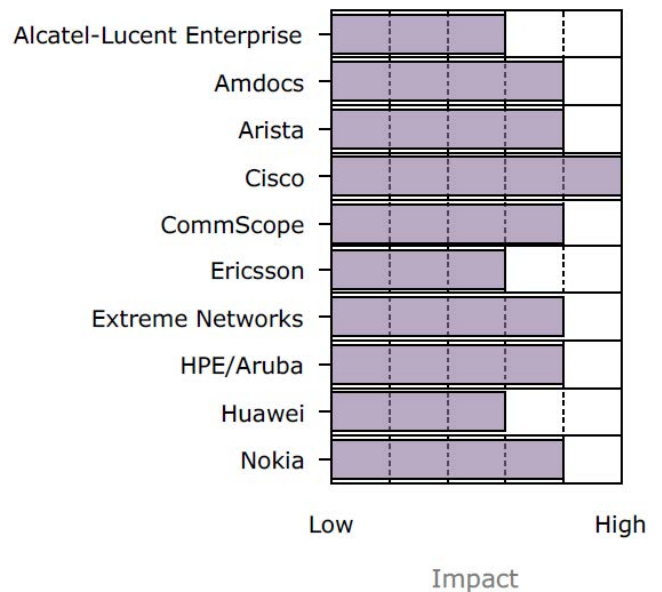
Juniper and Netcracker’s new joint solution combines two sources of innovation: Netcracker’s service orchestration and digital marketplace assets and Juniper’s Mist AI, to enable a new level of enterprise managed services.

QUICK TAKE

Event Rating



Competitive Impact



COMPETITIVE POSITIVES

- The Netcracker 2020 platform, introduced in June, significantly expanded its support for domain orchestration into areas of growing urgency for operators, including SD-WAN. The seamless combination of LAN and WAN orchestration represents a major advancement.
- The new alliance with Juniper is consistent with Netcracker's goal to use Netcracker 2020 to foster the growth of a number of ecosystem alliances, supported and enabled by open APIs.
- Juniper offers campus access backed by Mist's cloud-based AI that enables AI-fueled management and orchestration. In that sense, Juniper and Netcracker have been pursuing a common vision.
- The new solution should resonate with CSPs eager to participate in the software-defined branch (SD-branch) market as a means to offset the inevitable decline in MPLS revenue. The concept of truly end-to-end enterprise network management as a service offering is a winner.
- The Netcracker/Juniper alliance extends a relationship between Juniper and Netcracker's parent company NEC that extends back to 2003.

COMPETITIVE CONCERNS

- Netcracker and Juniper will need to take a consultative approach with service providers in order to help them understand the monetization capabilities of the alliance.
- Taking advantage of the venture requires that service providers be customers of both Juniper and Netcracker. That may limit the ability of many to take advantage of the enterprise venture, at least in the short term.
- Managed service providers will need to gain a better understanding of Netcracker's Digital Marketplace and the role it plays in this announcement.
- While end-to-end enterprise network management is a promising concept, the idea of guaranteeing this performance through SLAs is daunting, particularly for mission-critical applications. Some service providers may be risk-averse in extending SLA guarantees on such an extensive, end-to-end basis.
- As with many joint venture/alliance announcements, the proof is in the pudding. Netcracker and Juniper indicated that the joint solution has been successfully deployed by a Tier 1 global service provider, as yet unidentified.

EVENT SUMMARY

August 20, 2020- Juniper and Netcracker announced a joint solution called Enterprise Service Automation that enables end-to-end management of LAN/WLAN/WAN networks "from client to cloud." The combined solution enables service providers to offer combined LAN and WAN orchestration to enterprise customers as a managed service. The solution relies on Juniper's Mist AI solution, along with service orchestration from the Netcracker 2020 platform, to enable seamless lifecycle management across multiple network domains.

ANALYTICAL SUMMARY

PERSPECTIVE



Positive on Netcracker and Juniper's introduction of the joint Enterprise Service Automation solution, because it addresses a largely untapped opportunity. Enterprise connectivity providers have spent the past decade improving LAN management utilizing cloud and AI to enhance network visibility and automate service provisioning and network management. Meanwhile, CSPs have relied on increasingly sophisticated service orchestration capabilities to enable higher levels of automation and to position operators to monetize 5G and edge deployments. The combination of LAN and WAN orchestration represents a compelling case for combining chocolate and peanut butter to create a delicious blend.

VENDOR IMPORTANCE



High to Netcracker, because it represents a logical extension of the company's cloud-native Netcracker 2020 platform that the company envisioned with that product's introduction in June. It should also provide a boost to Netcracker's Digital Marketplace if the value proposition of that offering is properly conveyed to customers. Also High to Juniper because the ability to offer end-to-end orchestration and extreme visibility "from cloud to customer" represents yet another innovation being enabled by the company's acquisition of Mist in 2019. Juniper needs more differentiators to stand out in the crowded enterprise networking marketplace, and this joint venture offers something unique.

MARKET IMPACT



High on OSS/BSS platform providers, because the ability to add AI-fueled domain orchestration into campus/enterprise environments represents a largely untapped opportunity that other platform vendors have yet to embrace to the degree that this venture should enable. Other OSS/BSS software platform providers such as Amdocs may look to form similar alliances with campus access providers like Cisco and HPE/Aruba that claim much higher campus market share than Mist. All of that acknowledged, the true impact of this announcement will depend on its execution. If Juniper and Netcracker can articulate a value proposition that CSPs can understand, it could introduce a new class of enterprise services for operators still struggling with how to build next-gen enterprise revenue streams to offset declining legacy streams like MPLS.