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SUMMARY

2020 Gartner Magic Quadrant for Managed Network Services

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2020 Gartner Critical Capabilities for Managed Network Services

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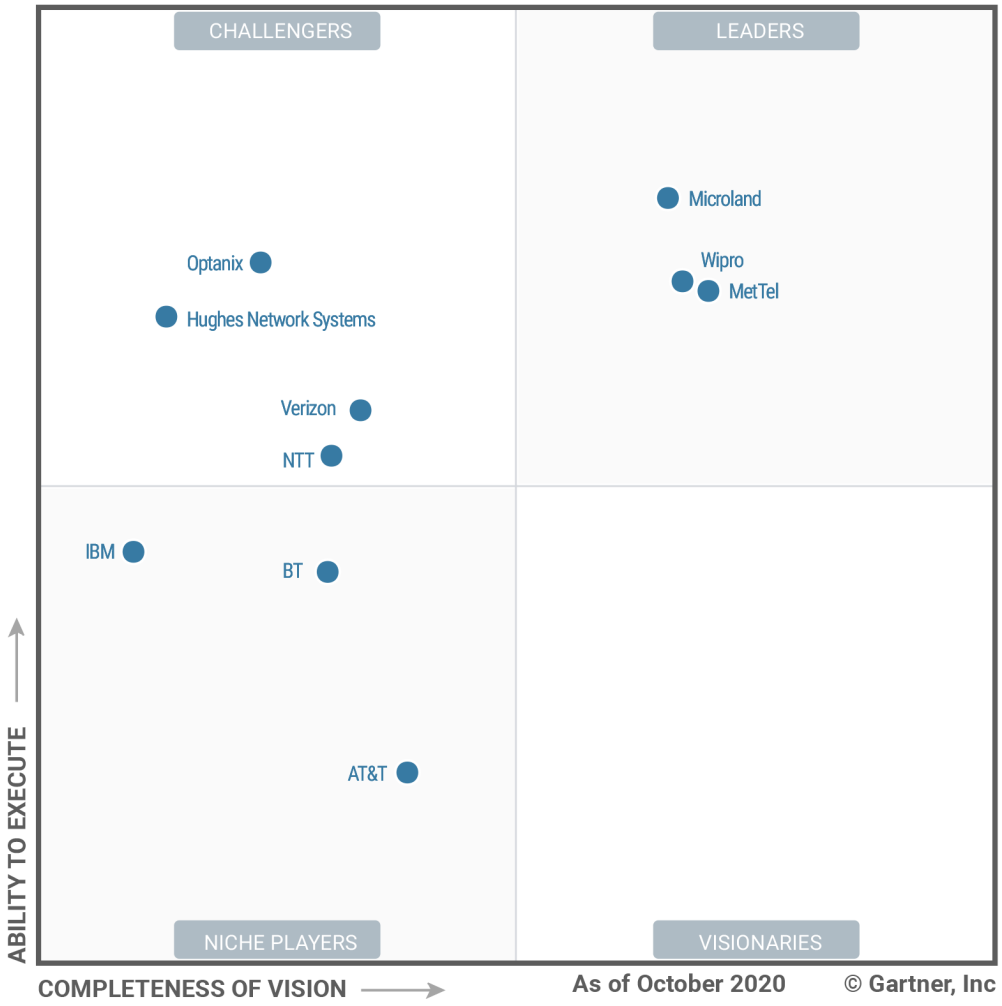
MetTel is the only US-based service provider in the Leaders Quadrant in the 2020 Gartner Magic Quadrant for Managed Network Services.

Enterprises struggling to balance expense reduction with greater WAN and LAN agility and performance are increasingly turning to managed network services. This research helps sourcing, procurement and vendor management leaders navigate the fragmented but expanding managed network services market.

Figure 1: Magic Quadrant for Managed Network Services



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Strategic Planning Assumptions

- By 2023, 40% of enterprise buyers will demand standardized service definitions from managed network services (MNS) providers, up from 15% in 2018.
- By 2023, 50% of enterprise buyers will demand MNS offers that include real-time, network-synchronized configuration management database (CMDB) capabilities, up from 8% in 2018.
- By 2024, more than 60% of software-defined, wide-area network (SD-WAN) customers will have implemented a secure access service edge (SASE) architecture, compared with about 35% in 2020.
- By 2024, to enhance agility and support for cloud applications, 60% of enterprises will have implemented SD-WAN, compared with about 30% in 2020.

Quadrant Descriptions

LEADERS

A provider in the Leaders quadrant will have demonstrated an ability to fulfill a broad variety of customer requirements through the breadth of its MNS offerings. Leaders will have the ability to shape the market and provide complete and differentiating services, as well as global service and support. Leaders maintain strong relationships with their channels and customers and have no obvious gaps in their portfolios.

CHALLENGERS

A vendor in the Challengers quadrant will have demonstrated sustained execution in the marketplace and will have clear and long-term viability in the market, but it may not have a complete and competitive MNS offering set. Additionally, Challengers may not have shown the ability to shape and transform the market with differentiating functionality or to serve a broad, global customer base.

VISIONARIES

A vendor in the Visionaries quadrant demonstrates an ability to add features to its MNS offerings to provide a unique and differentiated approach to the market. A Visionary will have innovated in one or more of the key areas of MNS (for example, service delivery quality, automation and customer experience). The ability to apply differentiating functionality across the MNS scope will affect its position.

NICHE PLAYERS

A vendor in the Niche Players quadrant demonstrates a near-complete product offering. However, it may not be able to control development or provide differentiating functionality due to other core focus areas the provider deemed more critical. Niche Players also may lack strong go-to-market capabilities that would enhance their reach or service capabilities in their MNS offerings.

Context

Gartner commonly sees buyer interest in MNS from every industry category, across public and private organizations of all kinds globally. Many buyers believe they have higher costs when internally managing their network operations versus an MNS approach. Though network operations have foundational elements (hardware and software) that are commonly capital expenditure (capex) in nature, most life cycle costs are opex, primarily in the form of labor. The amount of highly skilled labor required to plan, design, build and operate internally with do-it-yourself (DIY) NOCs is considerable. Together, these requirements present ongoing challenges for most enterprises — finding and keeping the right labor talent and hence seeking MNS alternatives.

MNS providers are either NSPs or non-NSPs, and MNS offers should all be available without requirement of enterprises to buy any other products or services from the MNS provider, including any networking hardware/software or any network transport services. In fact, all providers in this research (NSPs and non-NSPs) reported that no other products or services beyond MNS offers are required to be purchased by any customers. Yet, Gartner rarely observes this transport provider agnosticism from NSPs competing in the MNS market. In fact, our research reveals that NSPs rarely demonstrate interest in enterprise MNS opportunities that do not include buying network transport services from them. (MetTel note: MetTel is listed by Gartner as a "non-NSP")

Market Overview

All providers in both the Magic Quadrant and Critical Capabilities for MNS support multiple LAN and WAN edge product vendors, inclusive of both legacy networking equipment and software-defined capabilities. MNS are remotely delivered services from the provider's NOC with a separate disaster failover site (i.e., a backup NOC), while the NOC personnel are commonly deployed at the physical NOC location and/or deployed regionally. The providers in this market are either network service providers (NSPs) or non-NSPs, as both types are common in this market. The MNS market does not include network services (for example, WAN transport services), which are covered by the Magic Quadrant for Network Services, Global.

The MNS market today is a volume operations business model, not a complex operations model. Volume-based models focus on optimizing products and services in a relatively mature market (for example, LAN and WAN CPE). Volume models deliver standardized services undergirded by repeatable processes and tightly integrated tools with high degrees of automation to achieve high-scale efficiencies. Differentiation comes in the form of consistently high-quality service performance, customer satisfaction and cost-effectiveness. This Magic Quadrant focuses on the MNS volume operations business model of services.

The MNS volume delivery model has been in place for many years and has evolved from a complex operations delivery model, which is similar to custom-made IT outsourcing agreement delivery. Network technologies continue to evolve, and the software to manage these networks has improved substantially in the past 10 years. However, some MNS providers are also IT outsourcers that operate "both" models and straddle the two markets, which is difficult if the operations delivery is shared because challenges with strategy, offers, investments and focus collide. Gartner views the context for the MNS market across three tightly interdependent categories: service delivery quality, network operations automation and customer experience management.

NETWORK OPERATIONS AUTOMATION

For MNS, automation is the key to the efficiency and quality of the service delivery platform at scale. Importantly, automation is also critical to maintaining service delivery quality and positive customer experience from provider MNS offerings.

The key underlying components include tools that must be multitenant and can comprise AIOps, IT operations management (ITOM), ITSM, and network performance monitoring and diagnostic (NPMD) capabilities covered within Gartner research. For MNS providers, these core tools may be from commercial off-the-shelf (COTS) vendors and/or MNS provider tool original development as the foundation to the provider's service delivery platform. The automations are, in part, those that are configurable to varying degrees within the COTS tooling, but more commonly enhanced with overlay frameworks that are implemented to enable cross-functional (process) automations and orchestration of these automations. These overlay-type frameworks to the SDP typically are a form of message bus technology to orchestrate multiple automations and the requisite workflow processing, and as an ephemeral data store.

Further, we see a significant number of bots used for automation within the MNS provider's SDP. Bots are most commonly used to automate configuration and event management tasks, and for enhancing machine learning capabilities. For example, MNS providers employ bots to automate repetitive tasks that a human would otherwise have to perform manually.

MetTel

MetTel is a Leader in this Magic Quadrant. Its range of MNS for LAN and WAN is applicable to all enterprises. Adjacent market additions are common with its MNS clients, including security services, lastmile access management and telecom expense management (TEM). Its network operations delivery centers are mostly U.S.-based, and its clients tend to be large enterprises and government clients. MetTel's plans include continued expansion of network service support components within its MNS for LAN offering, with increased focus on endpoint technologies, including mobile wireless (4G/5G, Internet of Things [IoT] and Citizens Broadband Radio Service [CBRS]).

STRENGTHS

- MetTel has intelligent process automation with automated triage capabilities with added differentiation via multiple wireless technology support options within its MNS offers.
- MetTel has distinguished itself with strong customer satisfaction among large retail and financial services enterprises, as well as federal government MNS clients, and ranks in the top quartile for customer experience among others in this research.
- MetTel's core MNS for LAN and WAN offers top-quartile ranking among others in this research for providing end-to-end visibility support for managed SD-WAN and enterprise site access management service components.

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Gartner Magic Quadrant for Managed Network Services, Ted Corbett, Danellie Young, Lisa Pierce, 09 November 2020.

Gartner Critical Capabilities

Leading with managed SD-WAN, MetTel offers both MNS for LAN and WAN services that are targeted at all enterprises, while not targeting any specific vertical industries.

MetTel delivers its core MNS for LAN and WAN with end-to-end visibility support through its Intelligent Process Automation (IPA) platform, which provides service context. It also focuses on customer experience, quality and automation for effective management of service components for enhanced customer experience. Being very process-driven, MetTel offers customers consistency of service and strong results. Recent enhancements have included the delivery of service assurance tools to support WAH solutions, providing real-time and historical usage data for applications. It has a strong ticketing platform, which is both automated and proactive, and again focused on the customer experience. Multivendor options provide strong choices for enterprises, based on product breadth and feature choices. MetTel also offers multiple access support options as a wireline and wireless aggregator. While a majority of MetTel's sales success has been in the U.S. market, it is able to support geographies beyond the U.S. when needed.

MetTel has a strong track record for managed network services and should be considered for all scenarios and opportunities, as it scored well across all critical capabilities and use cases.

Gartner Critical Capabilities for Managed Network Services, Danellie Young, Lisa Pierce, Ted Corbett, 09 November 2020.

For more info, contact your MetTel agent or visit mettel.net.