The Future of SDP

EXECUTIVE SUMMARY

The concept of the service delivery platform (SDP) has been proven by early adopters, and the race is now on to consolidate the lessons learned in the next generation of SDP products. These products are adopting service-oriented architecture (SOA) concepts and Web services interfaces to become more plug and play, with service orchestration coming to the fore as a key technology for aggregating and coordinating components within the SDP itself, as well as all the application-level services that sit on top.

SDP activity is rising as the market enters a critical phase of development. The next round of SDP implementations is likely to be heavily influenced by another next-gen hot button – IP Multimedia Subsystem (IMS) – with legacy and IMS service convergence a top concern as suppliers reengineer their products.

As this activity accelerates, the SDP market is becoming even more sharply divided into two groups: vendors (often small startups) selling point solutions, and SDP “framework” providers – the systems integrators and network equipment suppliers that pull different components together to build carrier-grade environments that encompass the range of functions an operator needs in an SDP.

But with all the positive momentum, the SDP sector still has some significant challenges to overcome. Carriers appear to be buying into the general concepts embodied by SDP, but they are still unclear on how those concepts translate into real-world deployments. For their part, SDP vendors are not bringing a great deal of clarity to the SDP picture – there’s no consensus on a standard model for SDP, and vendor efforts to portray SDP as an integral match with IMS are only adding to the confusion.

The Future of SDP delivers a complete technology and market analysis of the SDP sector. It defines a comprehensive taxonomy of the components that make up an SDP and examines how these elements combine to create the different types of products that need to be integrated together to populate an SDP framework.

The report includes detailed product and strategic analyses for 24 different SDP vendors, including all major framework providers and point-solutions vendors. The report highlights each vendor’s interpretation of what constitutes an SDP, where its products sit in the Heavy Reading-defined SDP taxonomy, its individual market strategies, and its future development roadmap. The report also identifies important industry trends that are likely to shape the SDP landscape over the next few years.

For a list of companies evaluated in this report, click here.
Excerpt 1: Alcatel's OSDE Framework

![OSDE Framework Diagram]

Source: Alcatel

Report Scope and Structure

The Future of SDP provides a complete and independent analysis of the SDP market, based on in-depth interviews with all of the leading framework and point-solutions providers. The report is structured as follows:

Section I is an introduction to the report, with complete report key findings.

Section II looks at what an SDP is and defines its basic components through the creation of a master taxonomy developed specifically for this report. The taxonomy shows how the various SDP components are mapped into products. This section also categorizes SDP product vendors and provides a mapping between vendor and SDP components.

Excerpt 2: A Comparison of Common Framework Services

<table>
<thead>
<tr>
<th>OPEN MOBILE ALLIANCE</th>
<th>MICROSOFT CONNECTED SERVICES FRAMEWORK</th>
<th>ERICSSON SERVICE DELIVERY PLATFORM</th>
<th>IMS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounting (charging)</td>
<td>Session</td>
<td>Common charging</td>
<td>Real-time charging (OCS)</td>
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<tr>
<td>Identity management</td>
<td>Identity management</td>
<td>Single sign-on</td>
<td>Policy control (PDF)</td>
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<tr>
<td>User profile</td>
<td>Profile management</td>
<td>Provisioning</td>
<td>Common subscriber database (HSS)</td>
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<td>Device profile</td>
<td>Resource management</td>
<td>Device management</td>
<td>Session control (MRFC, CSCF)</td>
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<tr>
<td>Content management</td>
<td>Service catalogue</td>
<td>Content management</td>
<td>Service orchestration (SCIM)</td>
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<td></td>
<td>Service logic orchestration</td>
<td>Common catalogue</td>
<td>OAM</td>
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</tbody>
</table>

Source: Heavy Reading
Section III outlines the current state of the SDP market and the industry trends, such as IMS, that are affecting its development. It analyzes the market strategies being pursued by different types of SDP suppliers and makes recommendations, as well as highlighting vendors that show market promise.

Section IV includes profiles of the seven leading vendors of SDP frameworks – suppliers that have defined architectural models for the SDP and have put in place systems integration frameworks for realizing those models.

Section V provides in-depth profiles of 17 key vendors of SDP point solutions, covering a range of SDP components from network access middleware and application servers to policy control systems and content provider management solutions.

The report is essential reading for a wide range of industry participants, including the following:

- **Telecom service providers**: Exactly how does an SDP function, and how will those functions affect your ability to deliver new and innovative services to your customers? Which SDP suppliers are in the best position to meet your immediate and long-term needs? How will the SDP market evolve, and which suppliers are most likely to survive and thrive? What are the key points of intersection between SDP and IMS, and how will integration of those two technologies be accomplished? Who are the true market leaders in developing and deploying SDPs?

- **SDP suppliers**: How do your products compare with the competition? What are the specific strengths of your product line that will resonate with prospective carrier buyers? Are there potential weaknesses in your product that need to be addressed? How do your channel partnerships compare with those of your competitors? How can you improve on getting your marketing message across to carrier customers?

- **Investors**: Which SDP vendors are in the best position to succeed in this critical and emerging telecom technology sector? Which startups are delivering the technology that will gain market traction with carrier buyers? Which vendors are struggling to get their SDP message across?

The Future of SDP is published in PDF format.