

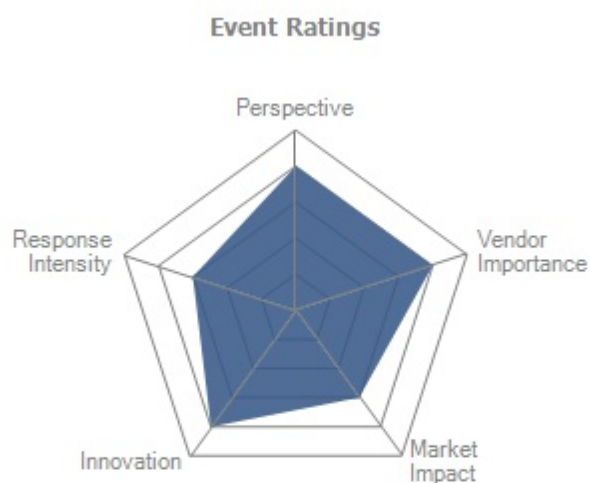
## Exponential-e Continues to Demonstrate Deft Style with SD-WAN Cloudnet Initiative

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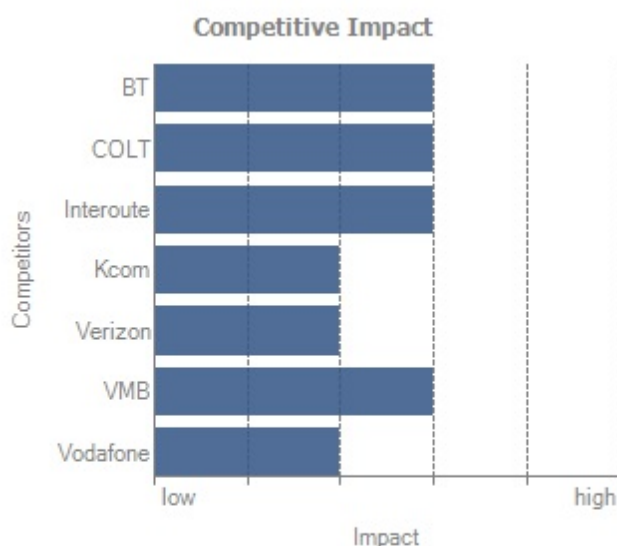
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Intelligence Alert

### Quick Take



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### Competitive Positives

- Exponential-e has a disruptive message offering customers automated services leveraging SDN and NFV.
- Partnering with Nuage Networks adds credibility to Exponential-e's SD-WAN proposal and gives extra levels of proven expertise. Nuage Networks is backed by the rapidly growing IP/Optical Networks business of Nokia.
- Exponential-e will introduce automation from the network branch to the applications in the data centre.
- Organisations can reconfigure cloud and connectivity services on demand through a simple self-service interface, which means that establishing a connection at a new location can be done very quickly.

### Competitive Concerns

- Nuage Networks will happily partner with Exponential-e's competitors.
- It is questionable whether the UK market is ready to embrace relatively new and untried SDN products for their valuable business applications.
- Exponential-e must be wary of vendor lock-in and developing proprietary services; its

SD-WAN offering should be compatible and interoperable with various vendors.

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## Event Summary

September 21, 2016 -- Exponential-e launched Cloudnet, a new self-service tool developed with partner Nuage Networks (from Nokia). The offering supports SDN-enabled connectivity between business sites with business applications underpinned by Exponential-e's private cloud network and delivered through a single piece of fibre. Cloudnet offers an automated service allowing enterprises to connect their business Internet directly to hosted and third-party applications and network services.

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## Analytical Summary

### Perspective



- Positive on the launch of Cloudnet by Exponential-e, because the service scores a number of differentiation points in a crowded UK WAN market and represents an early move on rivals. Exponential-e is an innovative and fast-paced provider, and offering this level of automation and the SDN-enabled concept of a self-service interface to connect business sites directly with applications should be compelling for UK businesses looking to make their first forays into trying out SD-WAN technologies.

### Vendor Importance



- High to Exponential-e, because as a relatively small alternative provider, it has to move nimbly to capitalize on emerging technologies and to differentiate against far larger rivals such as BT, Virgin Media Business and Vodafone. The company also needed to partner with Nuage Networks in order to provide proven scalability for a programmable solution across the data centre and WAN.

### Market Impact



- Moderate on the UK SD-WAN segment, because Exponential-e is offering a very clean and defined SD-WAN proposal that gives UK prospects the opportunity to begin transitioning parts (or all) of their existing traditional MPLS estates to SD-WAN solutions. UK-based rivals such as VMB, BT, Colt and Vodafone need to keep their feet hard on the acceleration pedal with regards to service developments in SD-WAN and communicate their progress to the market. Operators should be evaluating co-developed solutions leveraging Nuage Networks' skills, because offering a spread of SD-WAN options will be key moving forward and Nuage (backed by Nokia) represents a solid solution partner.
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This report is tagged to the following vendor(s):

Exponential-e , Nuage Networks

This report is tagged to the following content areas:

Service: Business Network and IT Services

Market: Business Network and IT Services - Europe Region

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