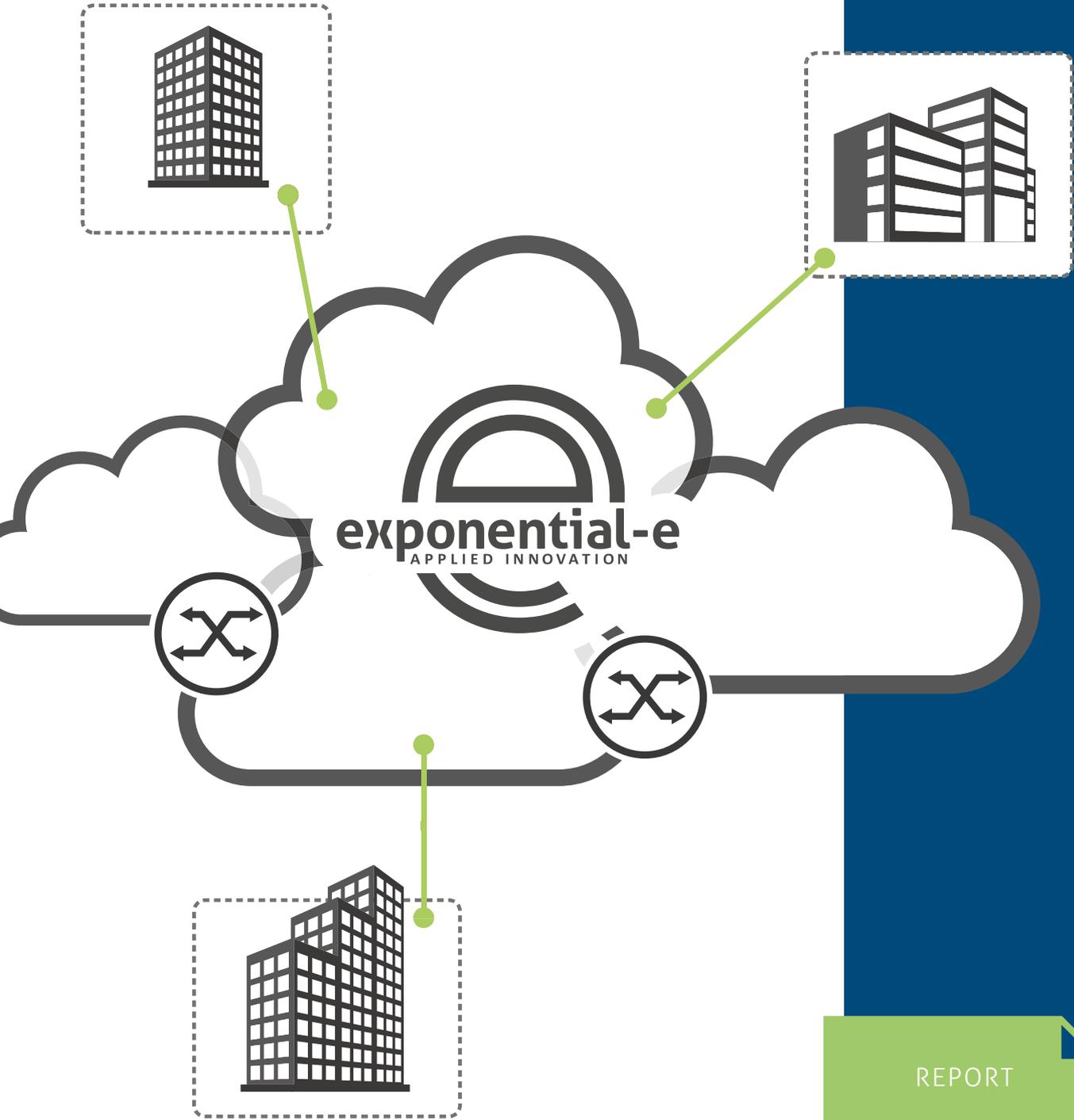


Exponential-e

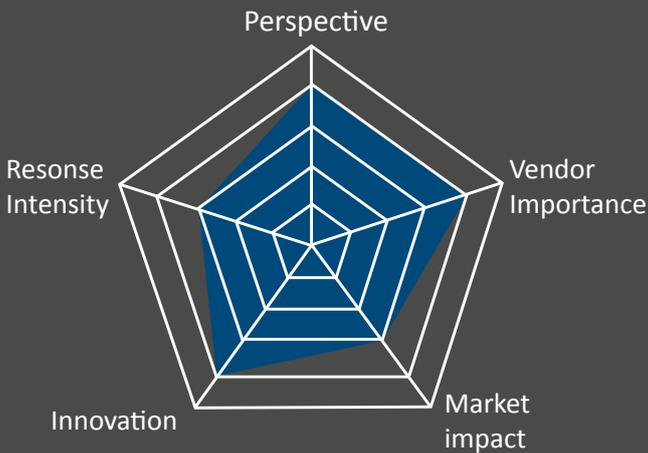
Continues to Demonstrate
Deft Style with **SD-WAN**
Cloudnet Initiative



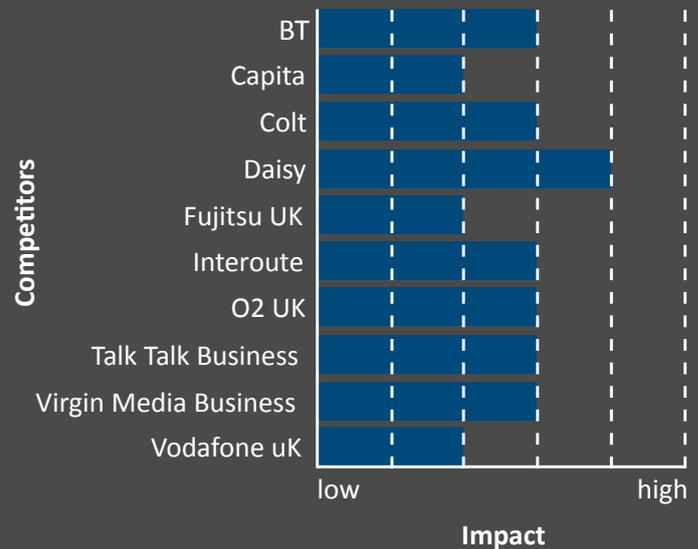
REPORT

Quick Take

Event Ratings



Competitive Impact

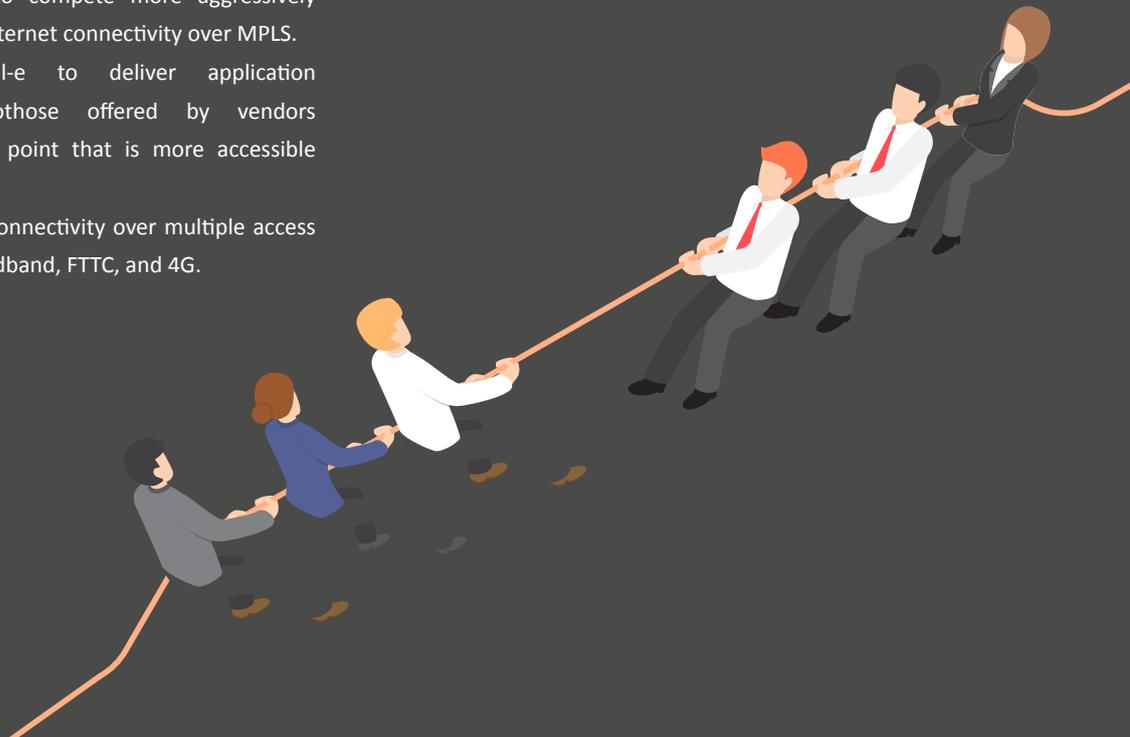


Competitive Positives

- If Exponential-e goes live as scheduled at the end of Q1, it will gain a significant 'earlymover' advantage over most network operator rivals in the UK.
- Exponential-e's customer base primarily utilise layer 2 services and control their own routing tables – these customers are likely to value SD-WAN self-management features.
- Exponential-e has a long-standing partnership with Nuage and its core network is powered in large part by Nokia technology.
- SD-WAN will allow Exponential-e to compete more aggressively on price through increased usage of Internet connectivity over MPLS.
- SD-WAN will allow Exponential-e to deliver application performance features similar to those offered by vendors such as Riverbed – but at a price point that is more accessible to mid-market customers.
- Exponential-e will support SD-WAN connectivity over multiple access technologies at launch, including broadband, FTTC, and 4G.

Competitive Concerns

- Exponential-e's SD-WAN solution is not presently available to customers and is not yet at a customer trial phase.
- Selling SD-WAN will rely on proven use cases and it will be some time before Exponential-e is able to deliver customer case studies to validate its solution.
- No major vendor has emerged as clear long-term SD-WAN technology winner to date, so Exponential-e assumes some risk with any choice, even Nuage.



Event Summary

January 18, 2017

Exponential-e has announced that it will be launching an SD-WAN proposition that will go live at the end of Q1 or the beginning of Q2 2017. The service is based on Nuage technology and will be available as both an underlay and overlay service. Exponential-e favours on-net solutions, but will use the service to deliver enhanced services over third-party networks/access services. Exponential-e will offer the service managed solution, or with a customer-defined level of self-service.

Analytical Summary

Perspective



Positive on Exponential-e's announcement that it is preparing to go to market with its Nuage-powered SD-WAN solution, because the provider is developing a managed service that will integrate with its core network and data centre platforms, rather than an overlay service. Nuage is emerging as a solid SD-WAN entrant. The provider will also give its SDWAN customers access to granular network analytics powered both by its new SD-WAN capabilities and its existing network monitoring tools.

Vendor Importance



High to Exponential-e, because SD-WAN technology will strengthen its core message of delivering hosted and network services as a 'single island of automation'. The provider is already working with customers to develop use cases (e.g., for retail customers), and to enhance its cloud migration proposition. Exponential-e can draw clearer differentiation between itself and rivals such as Daisy and Claranet, and closes a gap with rivals such as BT and Colt. SD-WAN will also allow Exponential-e to connect customers more quickly.

Market Impact



Moderate on the UK network services market, because Exponential-e has shown itself to be a canny competitor: its SD-WAN service, when launched, will strengthen its market position. BT can highlight that it already has a live SD-WAN service powered by Cisco IWAN, with a Nuage-based service on the way, whilst Vodafone can point out that its Cisco powered proposition will go live before Exponential-e's. But Exponential-e is still an early mover in the UK domestic market. Exponential-e can also highlight that it is delivering SD-WAN that is integrated with its network, not only as overlay service.



This report is tagged to the following vendor(s):



www.exponential-e.com

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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Current Analysis, Inc.
179 South Street, Boston, MA 02111,
United States
Tel: 877-787-8947
Fax: +1 (703) 404-9300

Current Analysis, Inc.
2 rue Troyon, 92316 Sevres Cedex,
Paris, France
Tel: +33 (1) 41 14 83 17



Visit the website
<http://www.currentanalysis.com>



www.exponential-e.com



Telephone
+44 (0) 845 470 4001



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www.exponential-e.com

