



AriaNetworks

Case Study: Revised go-to-market Strategy

München, den 7.10.2014

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Who Are We?

Aria networks provides unique network capacity planning, optimization and orchestration solution to telecommunication network and data centre operators, internet and cloud service providers, network equipment manufacturers and system integrators

Funded

Private, angel and institutional investors:

- Seraphim
- Capital for Enterprise

Founded

2005 in Chippenham, UK

Team

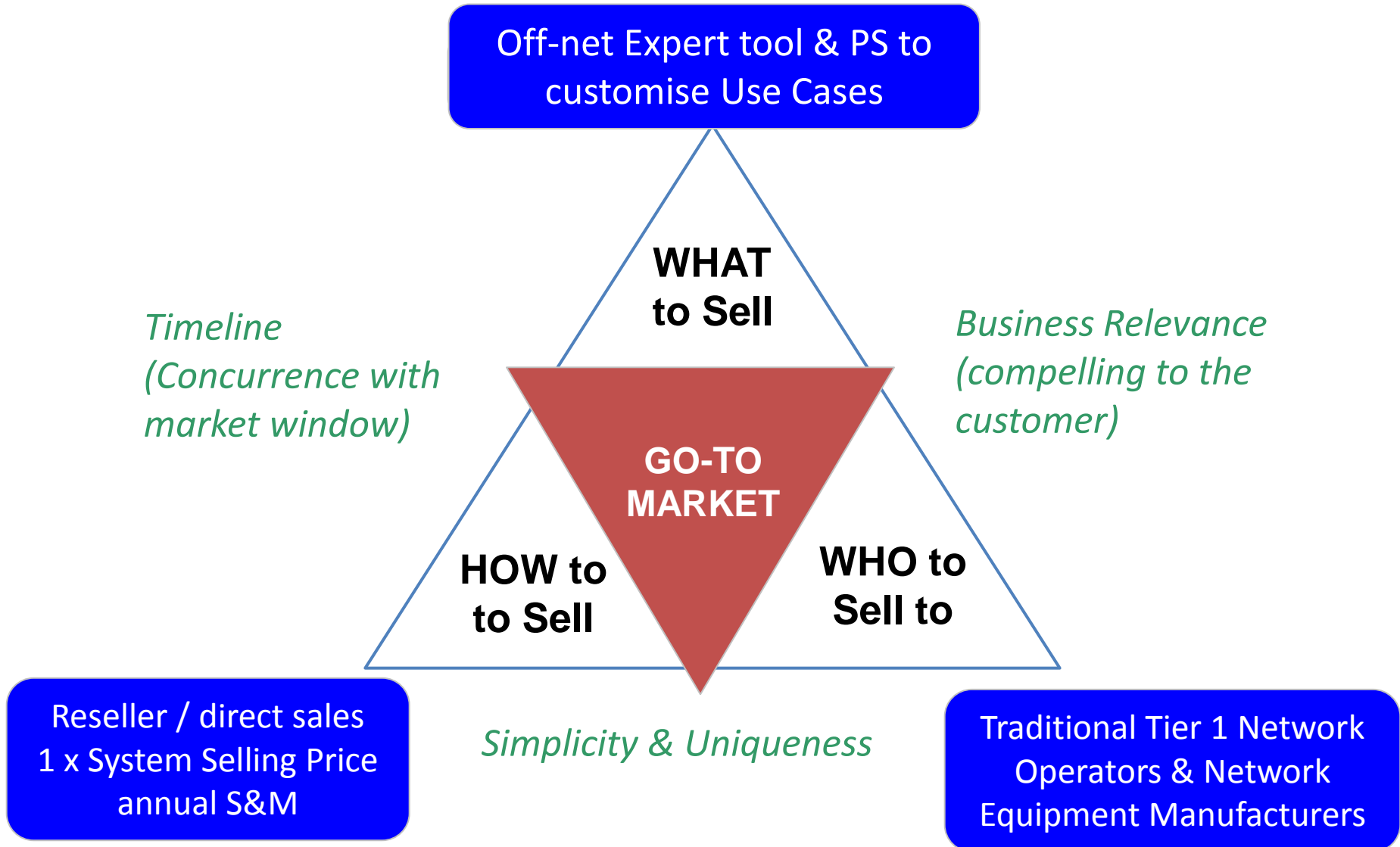
Extensive telecommunications, software, business, research and management experience, with backgrounds in companies such as Ericsson, Marconi, Lucent, PWC and Telcordia, 25+ talented SW engineers

Our Mission

The go-to network optimisation solution provider to radically improve efficiency, reliability and profitability for OpCo's of today's infrastructure and tomorrow's virtualised resources.



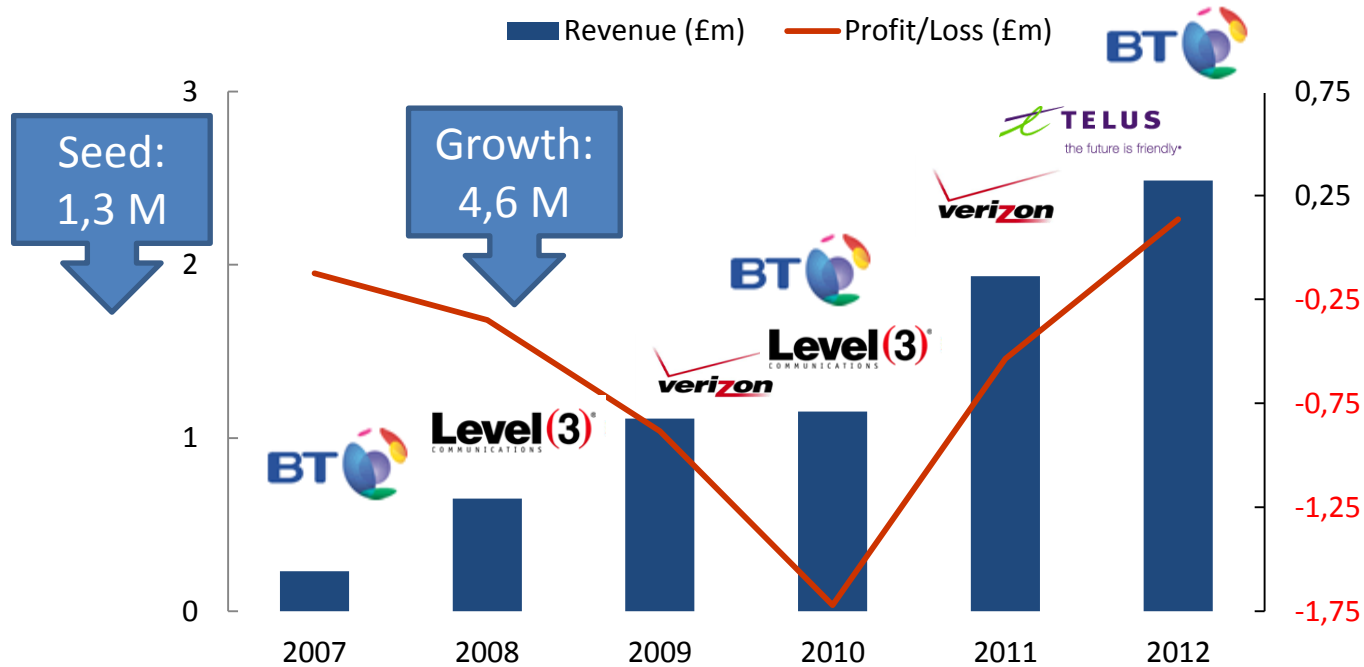
Initial go-to-market Strategy



A game plan for reaching and serving the right customers in the right markets

3 | through the right channels with the right product and the right value proposition.

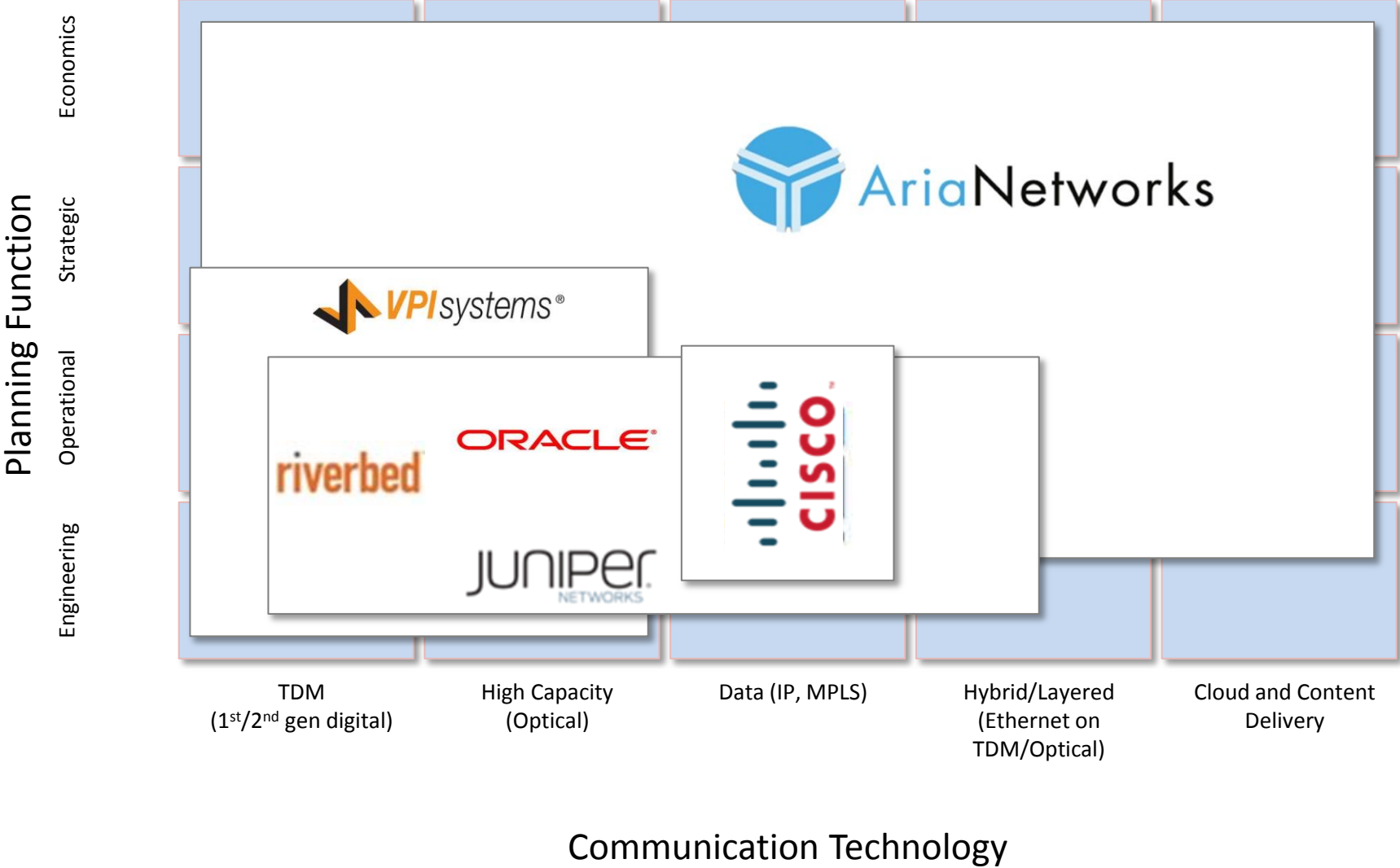
Phase 1 – Traditional OSS Approach



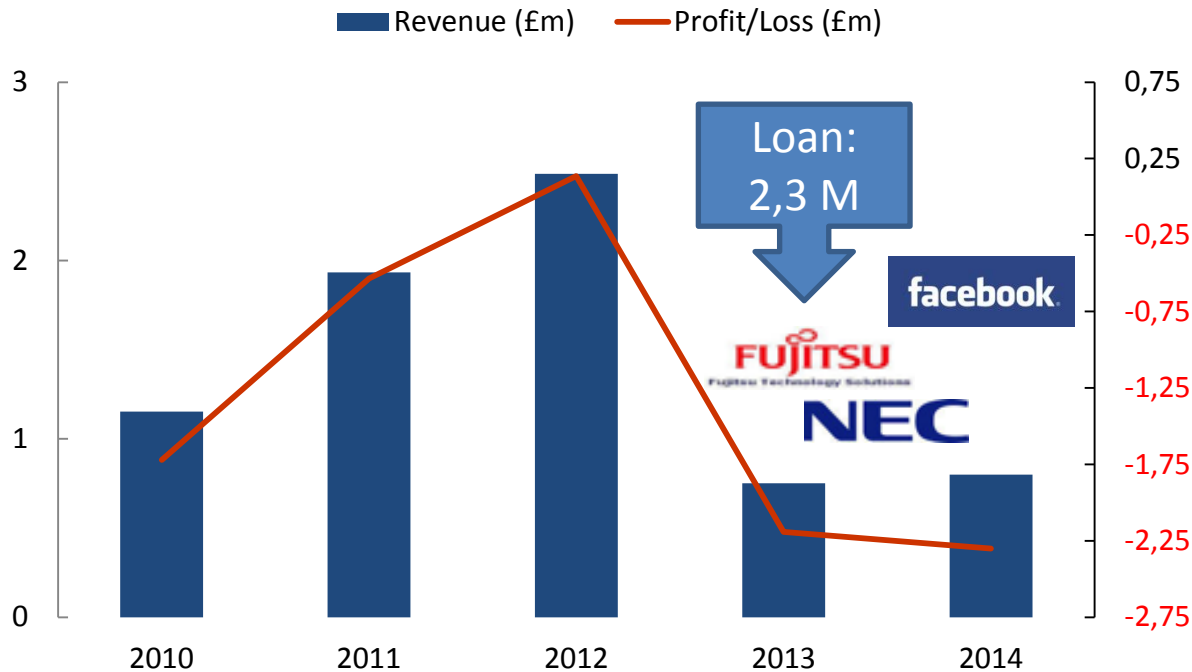
Limited performance due to

- Focus at tier 1 carrier while network planning became an increased subject for outsourcing
- Focus to UK/US market, complex sales requiring the involvement of CEO/CTO
- Light on sales and marketing, no consistent sales strategy (more an opportunistic approach)
- Service heavy product, long delivery cycle
- Limited funding during an economic crisis

Dynamics of Aria's traditional Eco-System



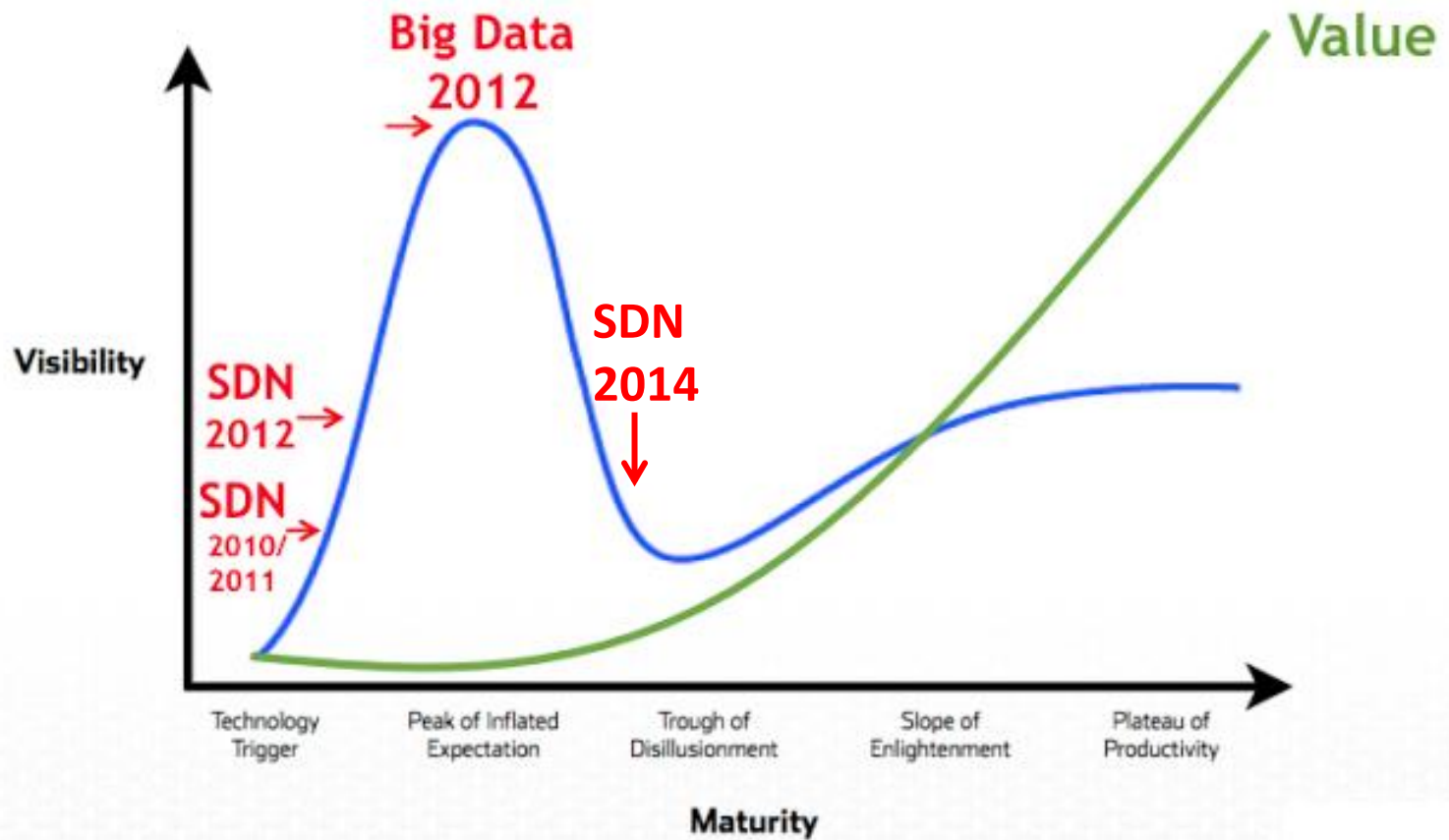
Business Transition



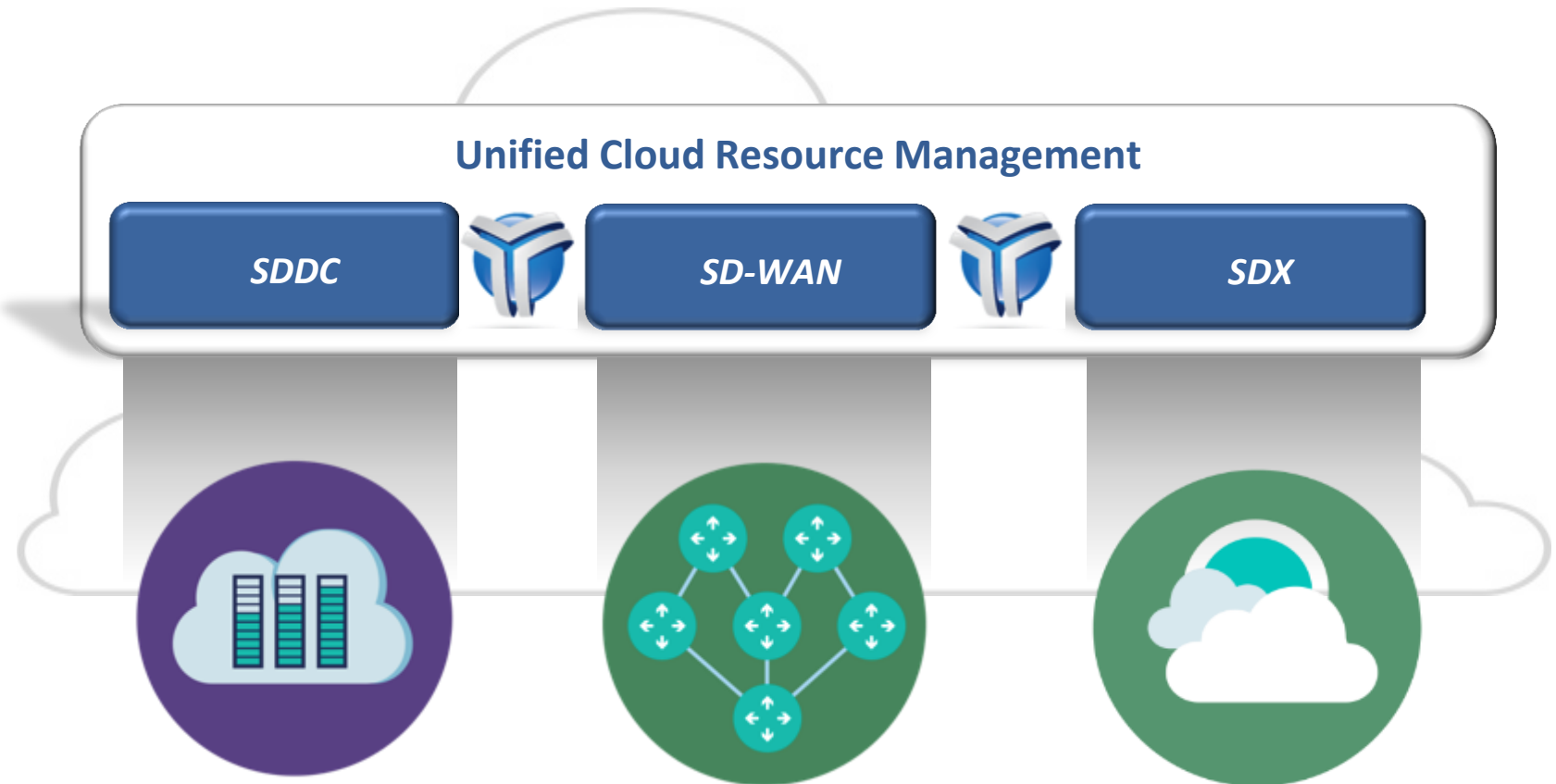
Business Transition

- Off-net expert tool-box becomes standardised on-net application (as a bundle of several use cases)
- Carrier grade client/server implementation and productizing (virtualisation already done)
- Focus to high growth OTT/ISP (prove of concept/market via the win of 2 out of the 4 largest players)
- Heavy on sales and marketing, consistent sales strategy with global execution
- Focus to SaaS (direct) and OEM business (for a more comprehensive orchestration solution)
- Thought leadership in network optimisation of software defined networks

Gartner hype cycle.



How Aria can shape the Software Defined future...

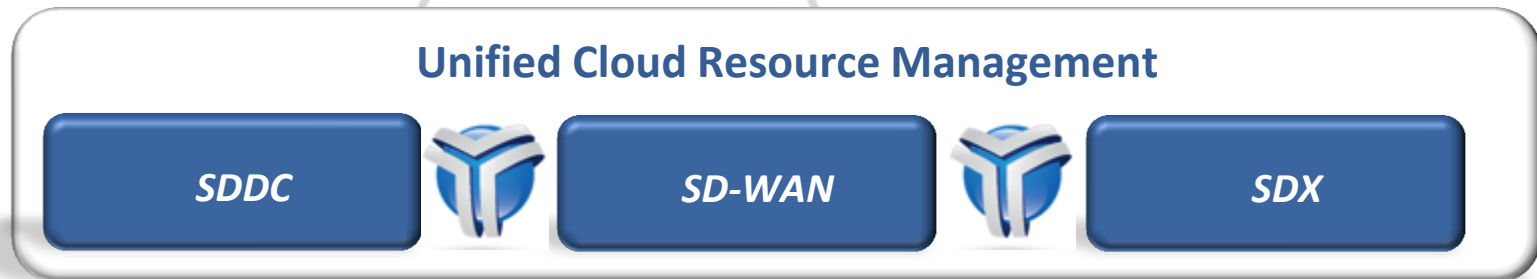


- Virtual Resources
- NFV

- IP & Optical Transport
- Fixed and Mobile Edge

End-to-end control of network and compute resources harnessed through the Aria platform

...addressing a giant market opportunity



50,000+ DC Operators
Networking Software \$1.2B by 2018
driven by NFV



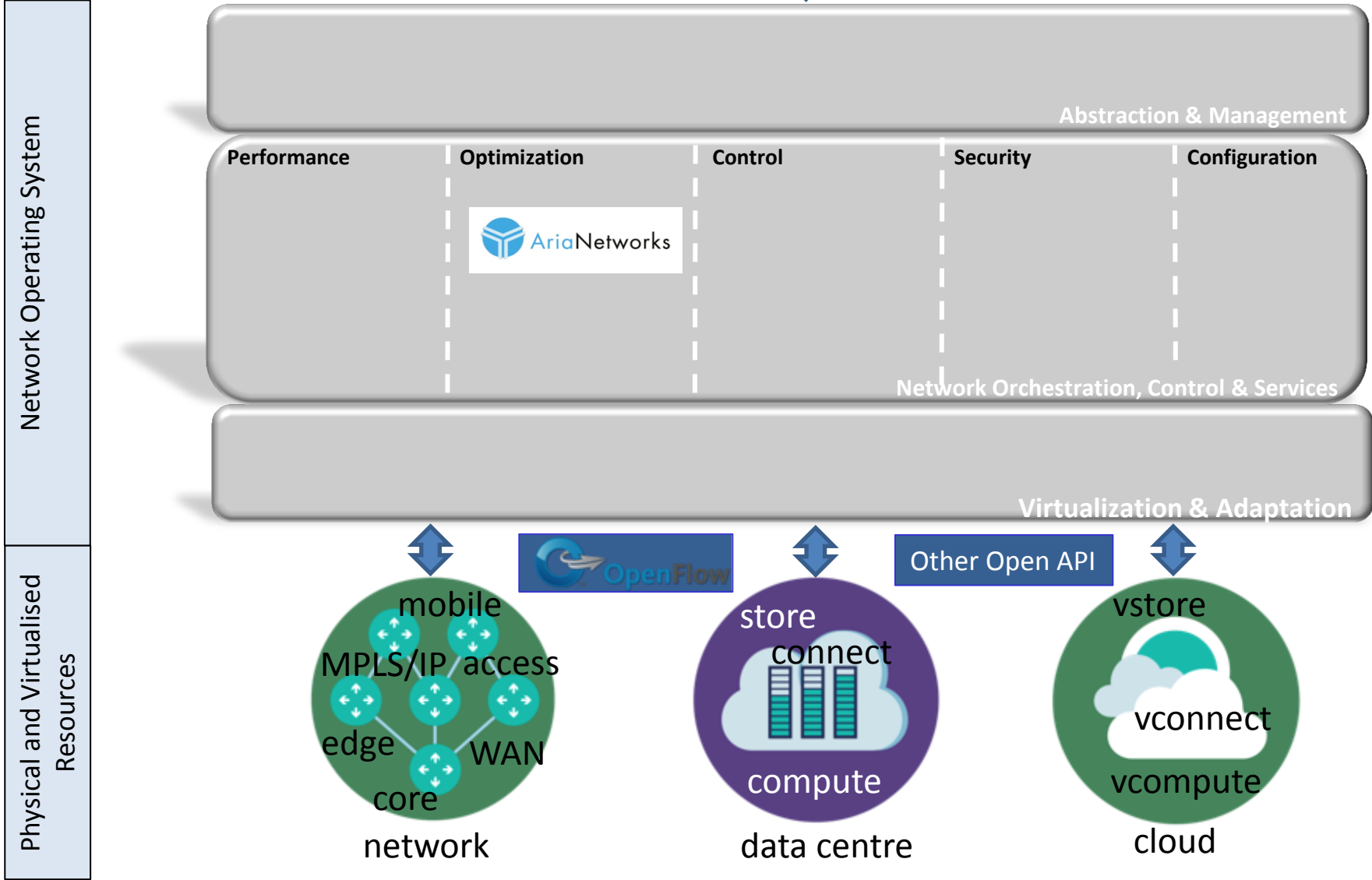
5,000 Network Operators
\$35bn by 2018



45,000 Web/Cloud
Service Providers
Spending tbc

Spending **\$40+B** on SDN by 2018

New Eco-System



New Eco-System



Network Operating System

Physical and Virtualised Resources

vmware | openstack | hp | IBM | ca | accenture | OpenCloud | ORACLE | Microsoft

Abstraction & Management

Performance | Optimization | Control | Security | Configuration

TS-Associates | JDSU | eci | AIO | citrix | OVERTURE | paloalto | ARISTA

riverbed | BLUECAT | nuagenetworks | tail-f | CYAN | Extreme | vmware

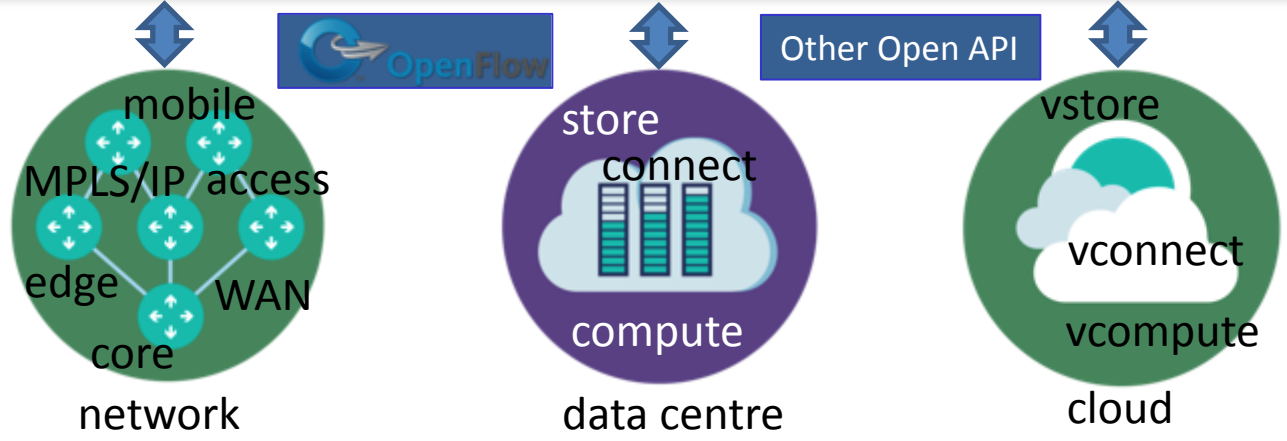
InfoVista | NETSCOUT | AriaNetworks | BROCADE | NetCracker | symantec | VARMOUR | vmware

TEOCO | PACKET DESIGN | Silver Peak

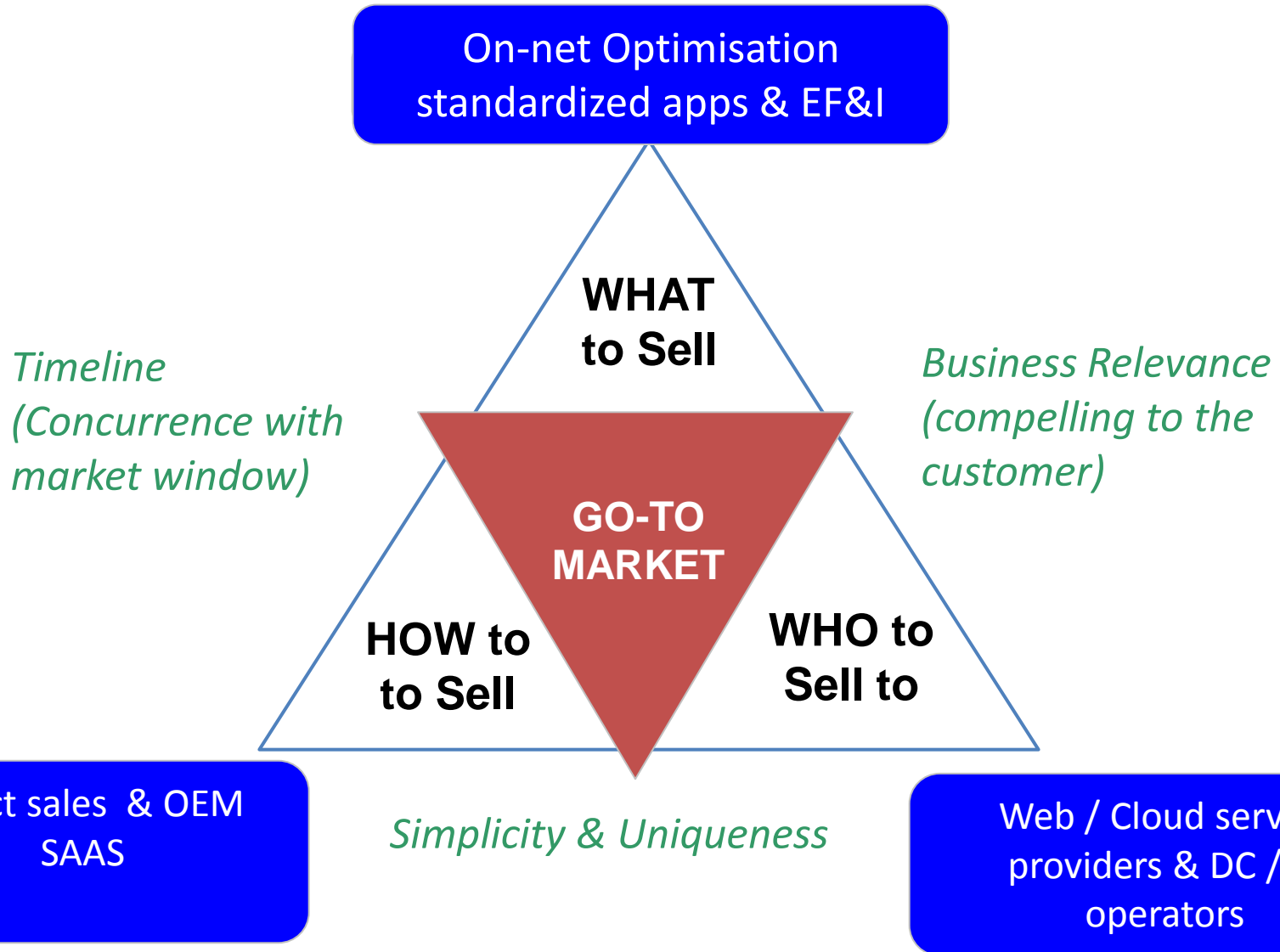
Network Orchestration, Control & Services

f5 | CISCO | ciena | infinera | NetApp | ERICSSON | JUNIPER | Alcatel-Lucent | FUJITSU | EMC² | ARUBA

Virtualization & Adaptation



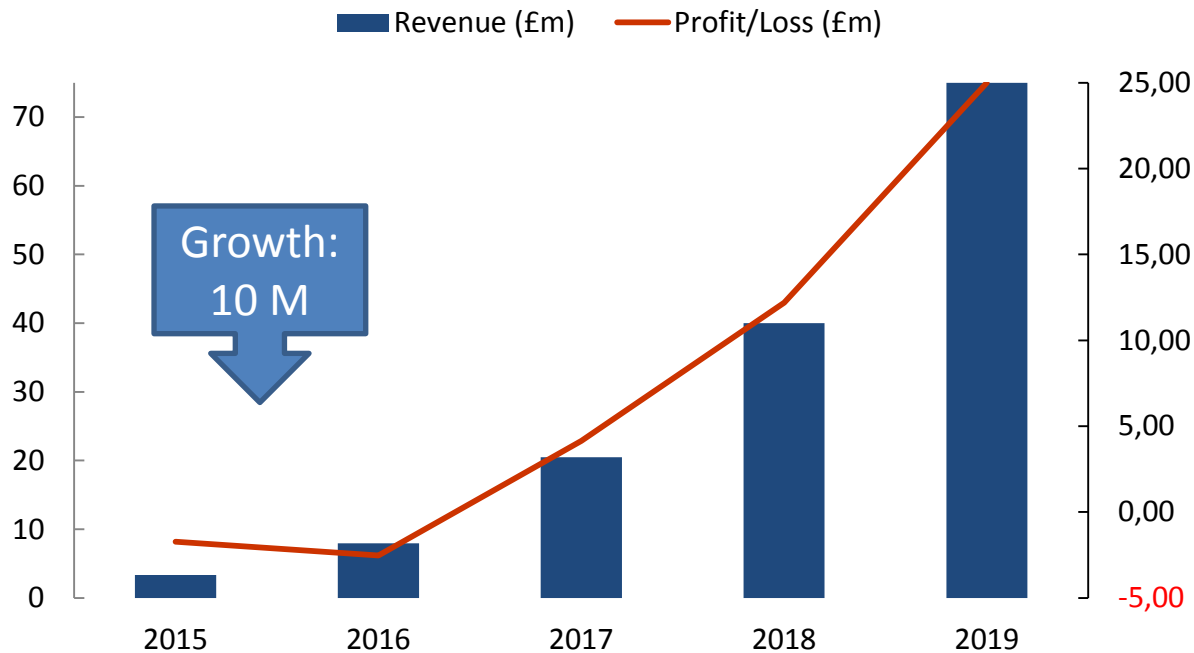
Revised go-to-market Strategy



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Phase 2 – Leading Edge Technology for the next big wave



Performance based on

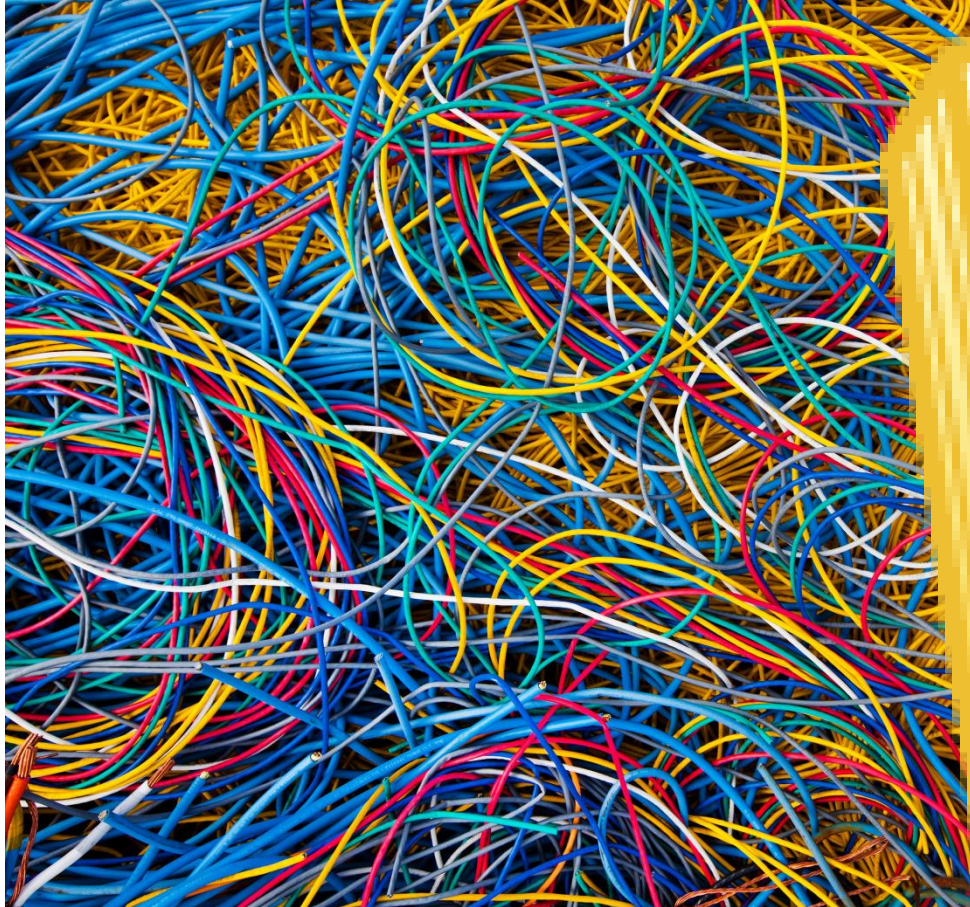
- Mission critical solution in the heart of the network control (vs. niche OSS play)
- Strong business case for fast RoI's
- Meeting window of SDN/NFV opportunity/hype
- Solution based on virtualisation technology from day 1
- Focus on global market roll out

Revised Marketing 1 of 3



Dear Google,
imagine you could
download optimisation apps
enabling you to increase the
utilization of your Mega-Data
Centres by 5% without any
service quality degradation -
what would that mean to the
ROI of your 50 B\$ investment?
PS: See how Facebook is doing it

Revised Marketing 2 of 3



Dear AT&T,
imagine your software
defined network would be
resource aware at any point in
time and automates the repair
and provision, so that you could
guarantee Google a premium
service level - what would it
mean to you to get 1 ct out of
each Google \$ generated via
your fabric?

PS: See how BT addresses this.

Revised Marketing 3 of 3



Dear Vodafone,
imagine your
virtualized network would
dynamically deploy its resources
where it is most needed to provide
a best-in-class customer
experience - what would that
mean to your market share?

PS: See your colleagues at
Verizon for more



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Aria Networks

Thank you