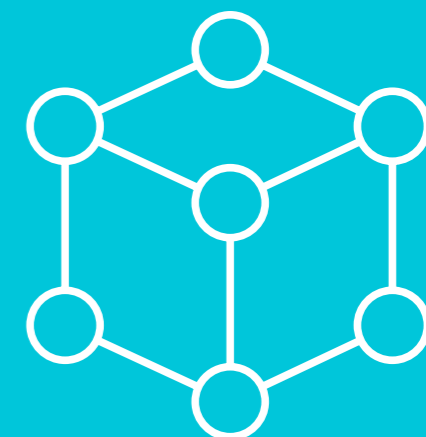


Managed SD-WAN Service_

Transforming traditional networks for the future



> SD-WAN trends_

By 2019

>50%

of new deployments of managed WAN solutions will incorporate SD-WAN

Source: Gartner, Five Dimensions to Help CSPs Choose the Right SD-WAN Technology Partners, Oct 17

By 2018

>60%

of enterprises will have deployed direct internet access in the branch offices up from <30% in 2016

Source: Gartner Market Trends: Top 5 Disruptive Trends for CSPs Worldwide 2017-2022, March 2017

SD-WAN Market to Reach

\$8 Billion

in 2021 as Enterprise Branch Network Requirements Accelerate

Source: IDC Forecast, July 2017

> Enterprise challenges_

1 IT workloads move to the cloud



85%

of enterprises will adopt a multicloud architecture by 2018

Source: IDC.com

2 Increasing bandwidth demands



48%

of enterprises expect their bandwidth usage to double by the end of 2017

Source: stateofthenetwork.com

3 Lack of Deterministic Application Performance

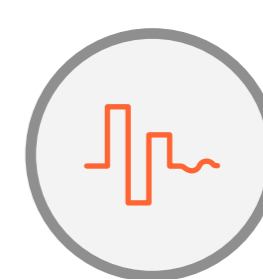


>50%

of Enterprise concerned that poor application performance will impact customer satisfaction

Source: Forbes.com Oct 2017

4 Inconsistent Security Framework



59%

of enterprises are boosting their spending on security as a result of digitization

Source: PWC.com

> Telefonica's SD-WAN solution_

Cloud-ready WAN architecture

Connects users in any location to applications in the cloud in a seamless, secure and reliable fashion.

Centralized secured network

Enables remote sites to connect with each other and be managed faster and easier than before.

Dynamic hybrid networks – agile WAN

Offers a scalable network between remote sites controlled from a central management platform.

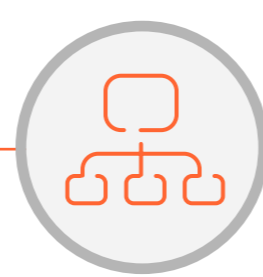
Application Performance Assurance

Gives each application the importance it requires in the network.

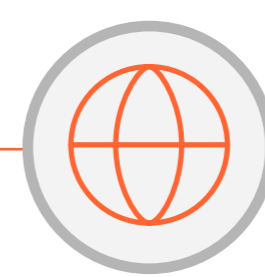
Customer web portal for network and application visibility and reporting to track service performance and commitments.

> Why Telefonica?_

Integrated Value Proposition including Cloud, Security & Network



One of the largest integrated telecommunications companies in the world



Service in >170 countries, strong presence in Europe & Latin America



Fully Managed Service