

CIRION TECHNOLOGIES RECEIVES THE 2023 COMPANY OF THE YEAR AWARD

*Identified as best in class in the Latin American
managed SD-WAN industry*



Best Practices Criteria for World-Class Performance

Frost & Sullivan applies a rigorous analytical process to evaluate multiple nominees for each award category before determining the final award recipient. The process involves a detailed evaluation of best practices criteria across two dimensions for each nominated company. Cirion Technologies excels in many of the criteria in the managed SD-WAN space.

AWARD CRITERIA	
<i>Visionary Innovation & Performance</i>	<i>Customer Impact</i>
Addressing Unmet Needs	Price/Performance Value
Visionary Scenarios Through Mega Trends	Customer Purchase Experience
Implementation of Best Practices	Customer Ownership Experience
Leadership Focus	Customer Service Experience
Financial Performance	Brand Equity

Latin American Landscape for Managed SD-WAN Market Growth

Enterprises in Latin America (LATAM) are accelerating digital transformation initiatives, moving core applications to the cloud, and enabling work from anywhere. Consequently, businesses across industries are embracing software-defined wide area network (SD-WAN) services as an integral part of their WAN

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Industry Director**

transformation strategy, largely to gain cost and operational efficiencies. SD-WAN delivers intelligent routing and security functionality through centrally managed software, thus simplifying deployments, optimizing network costs, and improving application performance. The LATAM managed SD-WAN market is in the initial phase of the product lifecycle, and network service providers are evolving their service offerings by adding new features to address changing customer demands.

Cirion Technologies’ predecessor company, Lumen Technologies, was one of the first network providers in the region to launch a standard SD-WAN service. The forward-looking move back in 2019 demonstrated the company’s commitment to innovation and in addressing unmet market demands. Within the telco industry, a considerable fear was that promoting the

expansion of SD-WAN might threaten and cannibalize fixed data technologies, such as multiprotocol label switching (MPLS). Consequently, several network service providers in the region delayed the release of these products to the market. Lumen Technologies always trusted that this technology would provide a leap in quality for WANs and that customers would not necessarily abandon their private fixed networks, which was a gamble that proved accurate. Moreover, the SD-WAN solution enhanced enterprise network resources with the capacity to handle multiple types of access, such as broadband, dedicated Internet, and MPLS.

The Cirion Technologies brand was launched in August 2022 after Stonepeak's acquisition of Lumen Technologies' LATAM business. Cirion Technologies has maintained Lumen Technologies' leading position in LATAM with more than 30 years of experience in the region. Cirion Technologies is a market leader in the business-to-business (B2B) segment, with a strong footprint in the region, including more than 20,000 intercity and metro route miles, 18 certified data centers and co-location facilities, and more than 11,800 on-net buildings. This infrastructure enables SD-WAN users to construct secure private networks across a combination of public and private infrastructures, including site-to-site encryption, regardless of the underlying access or transport technologies. Moreover, the solution enables centralized management and control for businesses to route traffic on an application-by-application basis or by access type, enabling the connectivity of sites through a variety of backbone connections.

Flexible Strategy for SD-WAN Service Implementation

Cirion Technologies delivers a multivendor managed SD-WAN and currently offers five SD-WAN options by partnering with different technology providers, including Versa Networks, Cisco SDWAN (Ex-Viptela), Cisco Meraki, Fortinet and VeloCloud (as VMware). Deployment options include an SD-WAN solution on-premises as a virtual machine in the cloud or data center or as a virtual network function (VNF) on a universal CPE (uCPE). Moreover, Cirion Technologies handles the solution and network support to enable intelligent routing and control, Wi-Fi, enterprise firewall, and data analytics. Support centers react to faults 24/7, support service level agreements, study event correlations, and make improvement plans.

Compared to legacy WAN solutions, the company's SD-WAN service enables a new level of visibility and control over applications and traffic, prioritizing business-critical elements. Customers can access a self-service center that handles billing (e.g., viewing, paying, ticketing, and reporting), trouble ticketing, and network configuration and testing, as well as product-specific performance and data reporting. Cirion Technologies' self-service approach dramatically simplifies and automates the procurement and provisioning of SD-WAN sites, driving the rapid adoption of SD-WAN for multiples sizes companies (Small-Mid and Big)

For the simplest solutions, Cirion Technologies offers prepackaged bundles with Fortinet and Cisco Meraki SD-WAN partner solutions, which can simplify the offer for businesses evaluating this product. and they are a good combination of cost and benefits.

The company has ramped up its Fortinet bundles to reach customers in the security segment and remote workers. The Secure SDWAN solution implemented with Fortinet was positioned as the primary request by the customers that are worried for the security integrity. The Cirion Secure SDWAN solution can mix the edge, device and cloud security as the higher option to deploy the next generation net.

Another option is Cisco Meraki. The Cisco Meraki solution provided by Cirion Technologies is simple to deploy and scalable, with different deployment and connectivity choices, and offers one-touch provisioning for multi-site deployments. This provisioning shows Cirion Technologies' leadership focus in LATAM because enterprises of this size are prevalent in the region, with such a standardized, easy-to-install solution creating a competitive advantage.

Finally, for more customized and complex technological solutions, options as Cisco SDWAN, Versa or Velocloud are the most required by the customers, and Cirion can implement.

Customer Service Experience

With its centralized customer-facing portal, Cirion Technologies provides visibility into all its services. In addition to providing total WAN visibility and co-management control functionality for customers, the portal enables interactive analytics dashboards and configurable monitoring reports. For load balancing

and resiliency, customers can access the portal for dynamic path selection.

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In addition, Cirion Technologies provides intelligent path selection and site-split tunneling. Split tunneling delivers some of the traffic over an encrypted virtual private network (VPN) tunnel, with the remainder traffic going through a separate tunnel on the public network. Split tunnel mode allows end customers to choose which apps to secure and which can be connected normally. Security is integrated as well, with the portal's security controls (e.g., nexgen firewall and

unified threat management) and centralized policy-driven control through a single interface. This capability enables customers to manage their WAN as needed to provide optimal cost and performance.

Clear Journey to SASE Drives SD-WAN Managed Services Growth

As businesses continue to plan for networking and security in a holistic manner, Secure Access Service Edge (SASE) is now recognized in the industry as the evolution of SD-WAN. Vendors and service providers are rushing to combine and enhance their SD-WAN and network security offerings as comprehensive SASE solutions.

In 2023, Cirion Technologies launched its SASE portfolio to unify network and security management for distributed enterprises. The company's SASE solution offers a cloud-native, totally unified approach to secure network access and management. In addition, the solution offers SD-WAN, firewall-as-a-service, Zero Trust Network Access (ZTNA), Secure Web Gateway (SWG), Secure SDLAN (including Network Access Control [NAC]) and logging deployment. The SASE offering includes optimized security operations and network traffic with end-to-end visibility, simplified deployment with service delivery automation, and balanced traffic across numerous networks. Self-managed and pro-managed service options increase productivity by freeing up IT personnel and other resources.

Even though SASE is in its initial phase, SD-WAN managed service providers must still offer a clear roadmap to SASE. Frost & Sullivan considers this early SASE offering to be a competitive advantage for Cirion Technologies over other SD-WAN providers that are still focusing solely on SD-WAN.

Conclusion

Cirion Technologies has a strong base of network assets in LATAM to leverage across the SD-WAN portfolio, has strong partnerships with leading SD-WAN vendors, and has its own VNF platform. Moreover, Cirion Technologies is a market leader in the LATAM B2B segment and can target a wide scope of customer segments by providing the choice to deploy services that best suit customers' price points and application requirements.

Cirion Technologies has prepackaged bundles with the leaders companies into the SDWAN industry as Fortinet, Cisco, Versa and Velocloud, to reach customers of multiple segments . Furthermore, the early launch of its SASE offerings is a competitive advantage for Cirion Technologies because SD-WAN managed service providers must offer a clear roadmap to SASE.

With its strong overall performance, Cirion Technologies earns Frost & Sullivan's 2023 LATAM Company of the Year Award in the managed SD-WAN industry.

What You Need to Know about the Company of the Year Recognition

Frost & Sullivan's Company of the Year Award is its top honor and recognizes the market participant that exemplifies visionary innovation, market-leading performance, and unmatched customer care.

Best Practices Award Analysis

For the Company of the Year Award, Frost & Sullivan analysts independently evaluated the criteria listed below.

Visionary Innovation & Performance

Addressing Unmet Needs: Customers' unmet or under-served needs are unearthed and addressed by a robust solution development process

Visionary Scenarios Through Mega Trends:

Long-range, macro-level scenarios are incorporated into the innovation strategy through the use of Mega Trends, thereby enabling first-to-market solutions and new growth opportunities

Leadership Focus: Company focuses on building a leadership position in core markets and on creating stiff barriers to entry for new competitors

Best Practices Implementation: Best-in-class implementation is characterized by processes, tools, or activities that generate a consistent and repeatable level of success

Financial Performance: Strong overall business performance is achieved in terms of revenue, revenue growth, operating margin, and other key financial metrics

Customer Impact

Price/Performance Value: Products or services provide the best value for the price compared to similar market offerings

Customer Purchase Experience: Quality of the purchase experience assures customers that they are buying the optimal solution for addressing their unique needs and constraints

Customer Ownership Experience: Customers proudly own the company's product or service and have a positive experience throughout the life of the product or service

Customer Service Experience: Customer service is accessible, fast, stress-free, and high quality

Brand Equity: Customers perceive the brand positively and exhibit high brand loyalty

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Key Impacts:

- **Growth Pipeline:** Continuous Flow of Growth Opportunities
- **Growth Strategies:** Proven Best Practices
- **Innovation Culture:** Optimized Customer Experience
- **ROI & Margin:** Implementation Excellence
- **Transformational Growth:** Industry Leadership



The Innovation Generator™

Our 6 analytical perspectives are crucial in capturing the broadest range of innovative growth opportunities, most of which occur at the points of these perspectives.

Analytical Perspectives:

- **Mega Trend (MT)**
- **Business Model (BM)**
- **Technology (TE)**
- **Industries (IN)**
- **Customer (CU)**
- **Geographies (GE)**

