



Business Managed Services

Partnering for Joint Success

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Enterprise Networks & Operations are Being Reinvented



Apps moving to
the cloud



Mobile/IoT devices
proliferating



Internet edge moving to
the branch



Complexities rising
exponentially



WAN and operating costs
under pressure



Cyber attacks becoming
pervasive

Customer Requirements are Changing



*Keep Pace with
Technological Change*

- Autonomous devices, augmented analytics, edge computing, 5G.
- Complexity outstripping capabilities



*Consumer-like
Experience
Desired*

- Self-service, control, immediacy
- Consumer experience at work



*Multi-modal
Buyer
Journey*

- Online research before purchase
- Mobile, social, LoB-driven
- Customer data and Insights



*Cyber
Security
Paramount*

- Data protection
- Reputation, brand and share price impact
- Widening attack surfaces



*IT Budgets
constrained*

- \$60B globally (McKinsey)
- 75% for network changes & troubleshooting
- 70% of policy violations - human error

SP environment is Changing



*Residential revenue ...
awaits 5G but*

- Fixed telecom revenue steady
- Video and other value added services
- Competition OTT

5G

*New investment
Delay in new revenue*

- Fixed broadband the first service
- Bundles and partners might be required



*Customer
experience
demand*

- Platforms create expectations
- Purchase, Care, Support
- Simple and flexible



*Customers prefer
bundles*

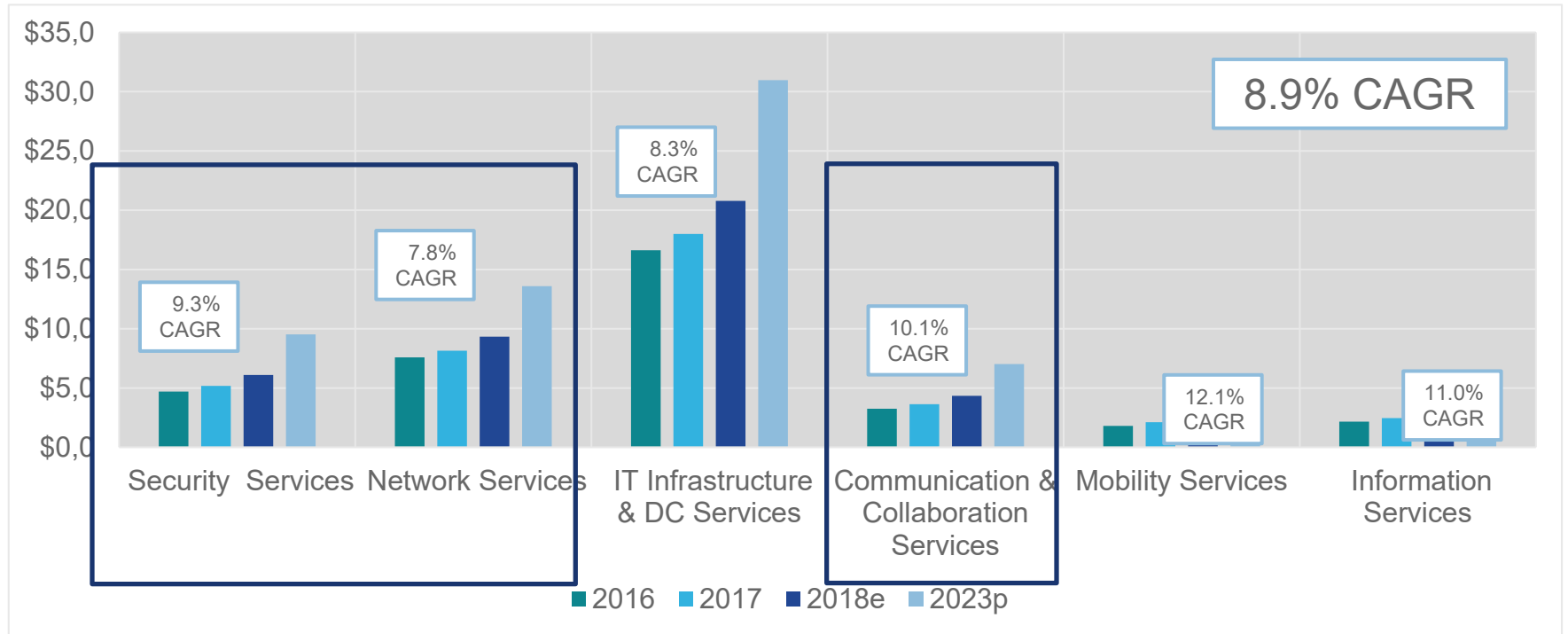
- Solution complexity lead to bundles
- IT and Network
- Technology difficult to follow



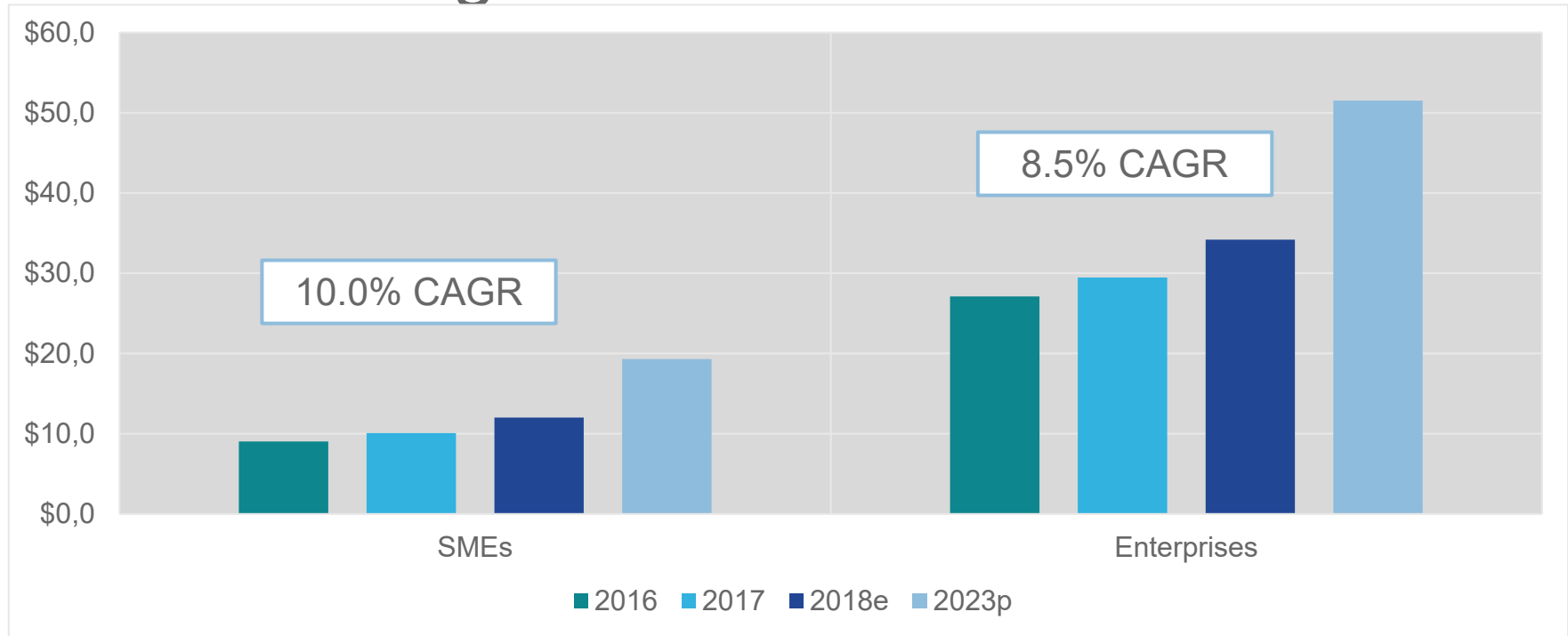
*Opex
constraints
Automation*

- Automation in provisioning and purchase
- Lead to Cloud based solution
- Time to Market

European managed services market growth 2016 – 2023

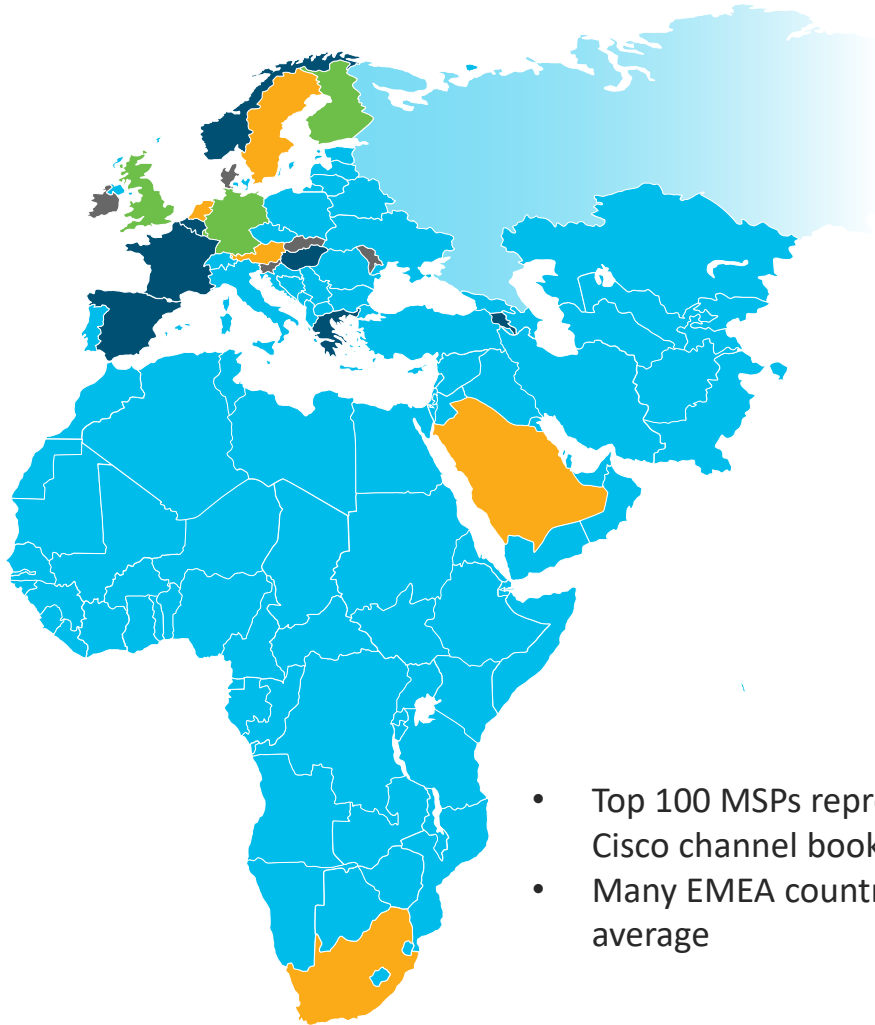
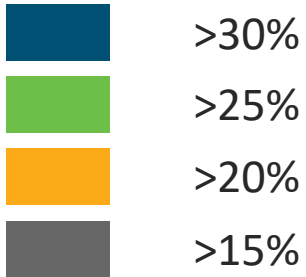


European managed services growth by end-customer segment









Managed Services and SPs are critical to our success

Top 100 MSPs as a Percentage of Channel Bookings:









- Top 100 MSPs represent 11% of Cisco channel bookings globally
- Many EMEA countries exceed that average

SMB High Velocity Managed Services

Name	Secure Broadband with Umbrella Easy Protect	Secure WiFi	Secure Network
Product Line			
Value Proposition	Bundle Cisco Umbrella with SP business broadband to provide malware protection and SP connectivity differentiation	Internet connectivity & managed Wi-Fi with Umbrella for simplified security and content filtering	Secure Wi-Fi with MX device to provide firewall, content filtering and UTM* services
Target	 Microbusiness (1 - 10)	 Small (10-100)	 Small (10-100)

SMB High Velocity Managed Services

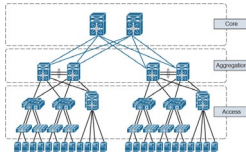
Name	Unified Communications + Managed Network*	Cloud Managed CPE	Cloud Managed Network Refresh
Product Line			
Value Proposition	Integrated bundles including wired or wireless phones, UC and managed W/LAN to provide QoS and E2E SLA	Leverage MX as standard CPE providing upsell proposition to managed UTM with 4G backup or temporary circuit	Full stack (wireless, switch, secure SD-WAN) deployment for network refresh & branch "in a box"
Target	 Small to Medium (10-250)	 SMB to Midmarket (10 -1000)	 Enterprise like SMB to distributed enterprise

SPs to Change



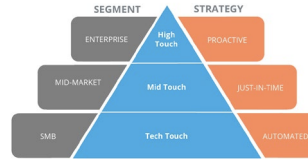
Acquire Technology awareness

- Software skills
- Virtualization Orchestration
- OSS



Architectural Model

- Network
- Data Centre
- Provisioning
- Processes



Marketing Strategy

- Customer profile
- Identify market segment
- Service Creation



Sales – Commercial model

- Commercial model per segment
- Auto and human interaction
- Partnerships



Willingness To Change

- Change requires decision
- Change has overhead
- Leads to business function changes

Partner Success Story

BT

Delivering Multiple Services from CPE



"It gives our customers peace of mind by combining a range of dedicated leased line internet speeds with simple plug and play connectivity and new integrated features such as security, Wi-Fi, Guest Wi-Fi and LAN services.

- Steve Best, Head of Enterprise Products, BT

One Device

Meraki MX used as the single CPE to deliver managed security, Wi-Fi, SD-WAN, and hybrid connectivity (fiber + LTE)

Increased Security Attach

BT is using the UTM features to dramatically increase their attachment of managed security services including firewall, IDPS, and VPN

Managed W-Fi

Providing managed wireless service for employees and guests with a rich user experience for self-service and analytics

Leveraging the Mobile Network

Using LTE capabilities to decrease the time to billing, provide a highly valued backup connection, and enable Managed SD-WAN