

# Business Case Overview - SSG

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# VPN Market Opportunity



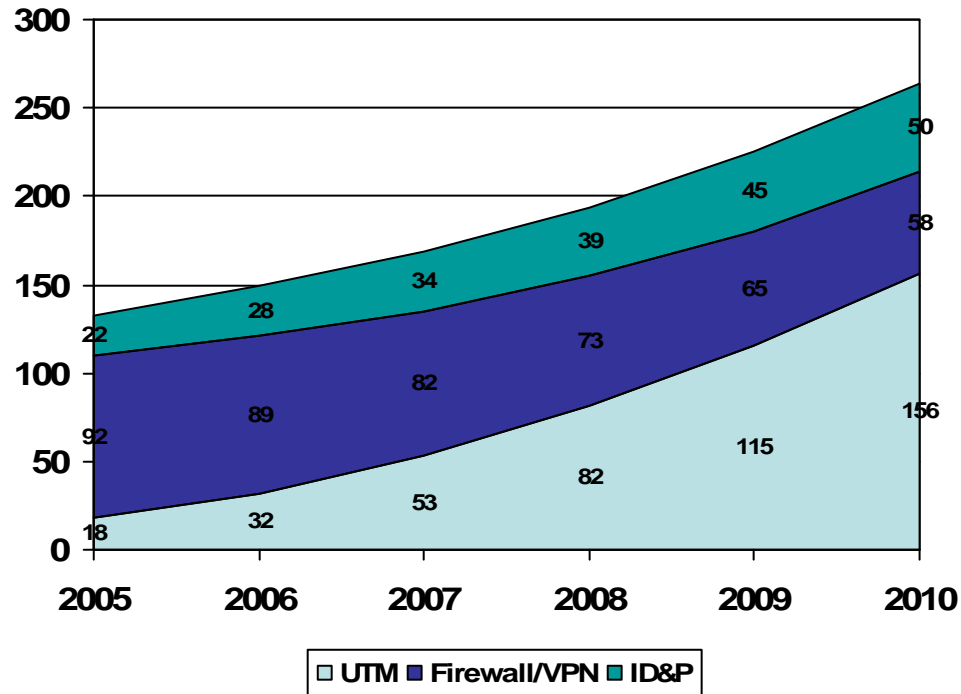
## ■ UK Market Value £ Millions

Segment	2007	2008	2009	CAGR
Unmanaged VPN	126	130	136	5.9
Managed CPE VPN	63	67	73	13.9
Network Based VPN	85	93	94	9.8

Source: Yankee Group

- **Increased Outsourcing Trend As Networking Becomes More Complex.**
- **Strongest Growth Segment Is Managed CPE.**

# EMEA Security Carrier Resale Market



Source: IDC

- UTM To Grow At 54% CAGR.

## Market Preference



“CPE-based services are deeply entrenched, as many customers are used to them, and prefer knowing that the security technology itself resides at their location, which they believe ensures end-to-end security”

**Infonetics: VPN And Security Services Annual Worldwide Market Size And Forecasts 27.11.06**

# Trends



## ■ Market Demographics

Vertical	2007	2008	2009	CAGR
Large	30%	29%	28%	-5.4
Medium	42%	42%	43%	2.5
SME	28%	28%	29%	2.8

Source: Infonetics

- SME And Medium Enterprise Segments Growing With Increased Investment In IT.
- SME Lower Levels Of Expertise Hence More Disposed To Service Provider Outsourcing.
- SME VPN Overtake Large Enterprise 2008.

# Solution

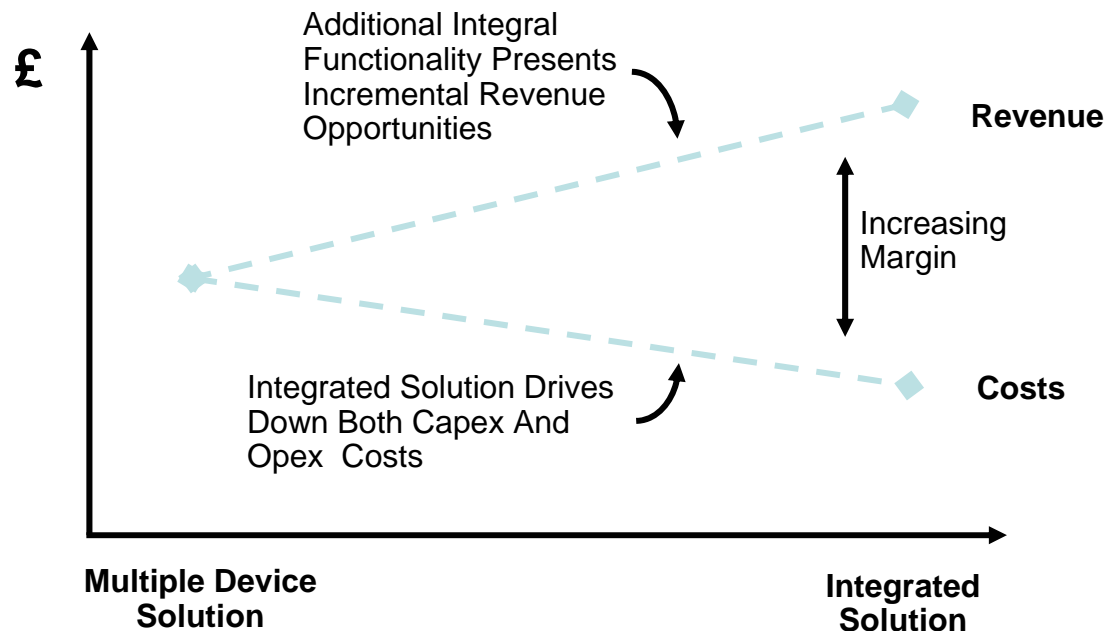


- Service Provider Economy Of Scale And Skills Offers The Most Efficient And Robust Solution.
- Ubiquity Of Broadband Access Drives Trend To Internet Based Solutions.
- Service Provider Managed CPE Solution Suited To SME And Medium Enterprise Networks.
- Integrated Routing Firewall Solution With Integrated UTM Most Comprehensive Solution.

# Service Provider Business Rationale



- Single Box Solutions Offer Operational Simplicity, Flexibility And Reduced Costs.



- Reduced Risk Of Stranded Assets.

# Juniper Networks Customers



## Service Providers



## Enterprises





Thank You !