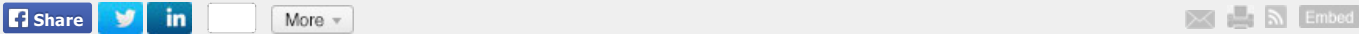
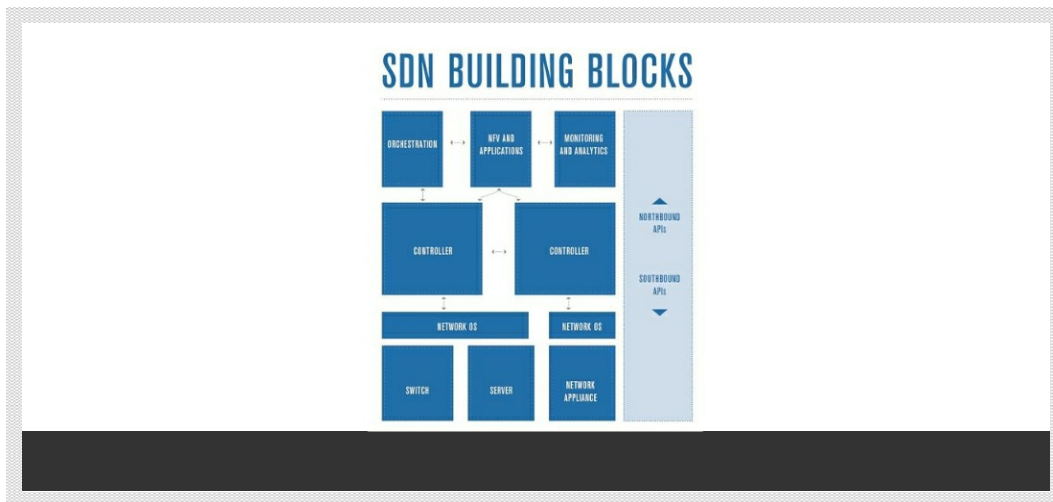


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## SDN Market to Create \$20B+ More Value

New Report from Rayno Media Inc. details total impact, including M&A and IPO, of Software Defined Networks (SDN)





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BOZEMAN, Mont., May 28, 2014 /PRNewswire/ – Rayno Media Inc. has released its first premium research of 2014, "The Software Defined Network Revolution: An Ecosystem Report," which predicts that innovation in Software Defined Networking (SDN) will create at least another \$20 billion in value – including via mergers and IPOs – by further automating networking and compute platforms with advanced analytics, open APIs, and new networking architectures.

Photo - <http://photos.prnewswire.com/pmh/20140528/91704>

The 30-page report, produced by Rayno Media Inc. and distributed by The Rayno Report ([www.raynoreport.com/premium\\_research](http://www.raynoreport.com/premium_research)) states that new open networking platforms, analytics programs, and networking management frameworks represent the biggest technology shift in the networking market in 20 years. Startups and incumbent providers alike have opportunities to create entirely new product lines, via organic development or through acquisition

"The Software Defined Networking (SDN) represents the biggest technology shift in networking in 20 years," says Rayno Report Chief Analyst and Publisher R. Scott Raynovich. "Another \$20 billion in value is going to be created, much of it through M&A and IPOs. You are going to see more venture capital investment and more M&A with big players buying some of the more prominent startups in 2014-2015."

The report analyzes more than 20 startups as well as the strategies of leading incumbent providers, detailing how SDN technologies will inevitably result in networking, computing, and storage technologies merging under one cloud computing infrastructure.

Some key findings of the report:

- The opportunity in SDN and Network Function Virtualization (NFV) is understated. The Rayno Report believes that open technologies serving as the foundation for SDN and NFV represents the biggest shift in networking in 20 years.
- The report studied investments, deals, and product strategies of two-dozen startups as well as the leading incumbents. Although large incumbents such as Alcatel-Lucent, Cisco Systems, HP, and Juniper have viable SDN and NFV strategies, The Rayno Report concludes they are going to have to make acquisitions to beef up their portfolio and gain customer traction.
- There have already been \$3 billion in startup exits in the SDN space, and Arista Networks has filed to go public shortly. The Rayno Report concludes there will likely be at least another \$20 billion in value created, but potentially much more.
- The report names the "Top Ten" startups in the SDN and NFV space and includes their estimated valuations.
- So far, at least \$600 million has been invested into SDN and NFV startups at the venture capital level. Expect another \$1 billion more to be invested over the next three to five years.

Companies mentioned and/or discussed in this report:

Adara Networks, Alcatel-Lucent, Arista Networks, AT&T, Bank of America, Big Switch, Brocade, CenturyLink, Ciena, Cisco Systems, Cloud Physics, Cumulus Networks, Cyan, Extreme Networks, Gigamon, Glue Networks, Google, IBM, HP, Juniper Networks, Metaswitch Networks, Mdokura, Nuage Networks, NEC, NTT, Pertino, Pica8, Piston Cloud Computing, Plexxi

Networks, PLUMGrid, Pluribus Networks, Stateless Networks, Tail-f, Telefonica, Vello Systems, Verizon, VPItela.

The report is available immediately for a single-user license of \$899. For multi-user enterprise licenses, please inquire at [sales@raynoreport.com](mailto:sales@raynoreport.com). The report is now available here:

[http://raynoreport.com/premium\\_research/](http://raynoreport.com/premium_research/)

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