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CLOUD CONNECT SERVICES EVOLUTION

OVERVIEW

This **Cloud Connect** report is mainly about developments with respect to technology innovations, customer requirements and service offerings over the coming 2-3 years (horizon 2023). Indeed, the study is not just about precise feature roadmap developments for the next 12 months, but more about how Cloud Connect services in general, could / should look like by 2023. Thus the study is more explorative and future oriented, and aspects such as SDN, virtualisation NFV/VNF, SD-WAN, Cloud - especially Cloud UC / UCaaS - are particularly discussed.

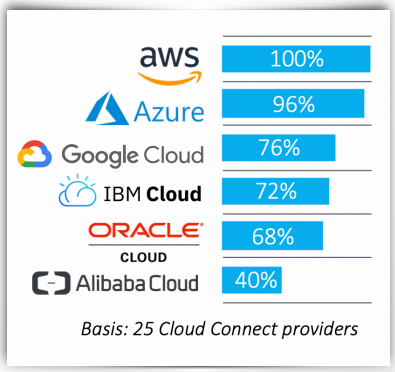
This strategic paper is based on InfoCom's ongoing research programs, discussions with market participants, and analysis of publicly available information from various sources.

KEY ASPECTS COVERED

- **Country Coverage**
- **L3 IP versus L1/2 Ethernet**
- **IPsec Tunnels**
- **Security Options**
- **SLAs**
- **Pricing Models**
- **Other key aspects** (CoS, WANx, Microsoft "Virtual WAN")

SNAPSHOTS | EXCERPTS

Logically, **based on underlying WAN services** (L3 IP MPLS or L2 Ethernet VPNs), **the geographic coverage** of the Cloud Connect services of the providers **is the same as their WAN services:** traffic to CSPs (Cloud Service Providers) can first go from one VPN country to the next, and then to the CSP. However, this has **latency implications.** In addition, AWS and Azure work with regions: isolated in the case of AWS whereas by Azure regions are interconnected, i.e. customers can access all regions from a single PoP, although even for Azure, China, Germany and US government are exceptions and remain isolated regions.



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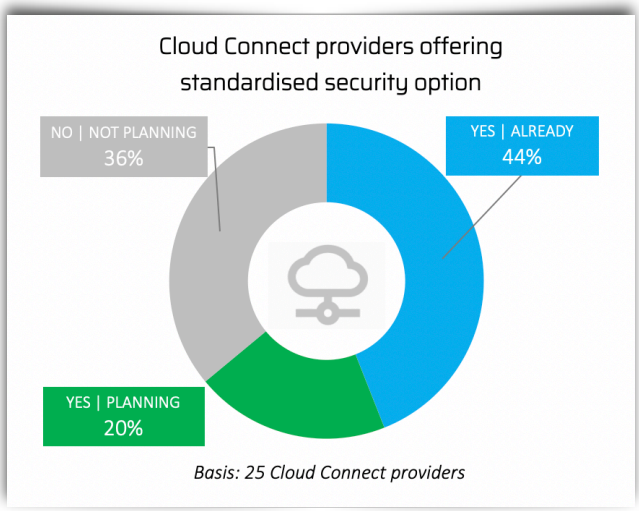
Security Options

Standardised security options with Cloud Connect services are not overall that frequent: several providers stress the inherent security of their private connections (L3 IP MPLS or L1/L2 Ethernet).

- **However, standardised security options are more frequent with L3 IP Cloud Connect than with L2 Ethernet or L1 wavelength,** which are overall considered as somewhat more secure than L3 IP.
- **Nearly always the core security service is a Cloud firewall service,** with various additional security features depending on provider.
- **Especially large international providers targeting MNCs offer such services.**



OTHER SPECIFIC AREAS DISCUSSED

- Security and performance as the main issues when accessing cloud services;
- L1/L2 services should, or at least could, play an increasing role;
- SD-WAN will certainly be much less detrimental to Ethernet than to L3 IP MPLS, & may even be beneficial to Ethernet;
- IPsec is particularly suited for non-latency sensitive application with a short lifespan;
- Redundancy between the Cloud Connect providers and the CSPs.

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