

Extreme Networks NFL and Technology Showcase

OCTOBER 11, 2018



Welcome

ED MEYERCORD
President and CEO



Agenda



5:00 PM

Welcome: **Ed Meyercord, President and CEO**

Overview: **Norman Rice, Chief Marketing, Development and Product Operations Officer**

The Changing IT Landscape: **Bob Laliberte, ESG**

Digital Transformation & the Edge: **Dan Dulac, VP of Solutions Strategy**

Delivering High Density Wi-Fi Solutions: **John Brams, Director, Sports & Entertainment**

Q&A



6:20 PM

Walk to Stadium



6:45 PM

Stadium Technology Tour: **Justin Warren, Giants VP of Information Technology**



7:15 PM

Suite and Field Access



8:20 PM

Kickoff of Giants v. Eagles!

Corporate Overview

NORMAN RICE

Chief Marketing, Development and Product Operations Officer



Extreme Networks

Software-Driven Networking Solutions from the Enterprise Edge to the Cloud

History of Innovation

- Founded **1996**
- **20+ year** pioneer in networking
- **Industry's first** Gig-E / 10 Gig-E Switch
- Extensive patent portfolio
- Networking **Solutions** for Enterprise and Cloud
- **#1 Ranked, 100% insourced** service and support

Global Strength

- Revenue: **\$1 Billion**
- **2,700+** employees
- NASDAQ: **EXTR**
- HQ in **San Jose, CA**
- **Business in 80+ countries**
- **30,000+** customers
- **6,000+** partners



Age of Acceleration: Driving Digital Transformation

11.6
BILLION MOBILE-CONNECTED
DEVICES BY 2020

49 EXABYTES
MONTHLY MOBILE DATA TRAFFIC BY 2021

1.7MB
OF DATA CREATED EVERY SECOND,
FOR EVERY PERSON BY 2020

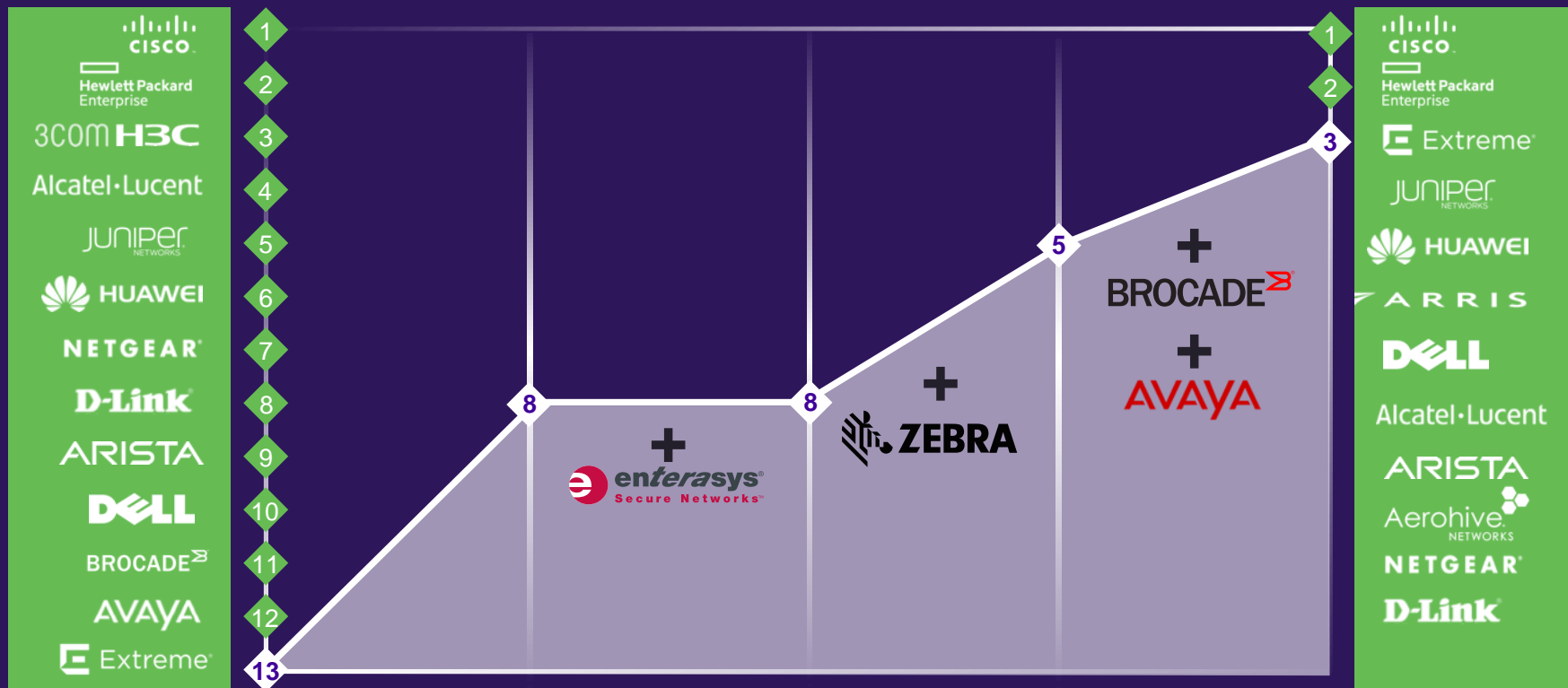
95% OF NEW PRODUCTS
TO CONTAIN **IOT**
BY 2020

BY 2021 **40%** OF IT STAFFS
WILL BE GENERALISTS

NETWORKING
IS THE LAST TO TRANSFORM



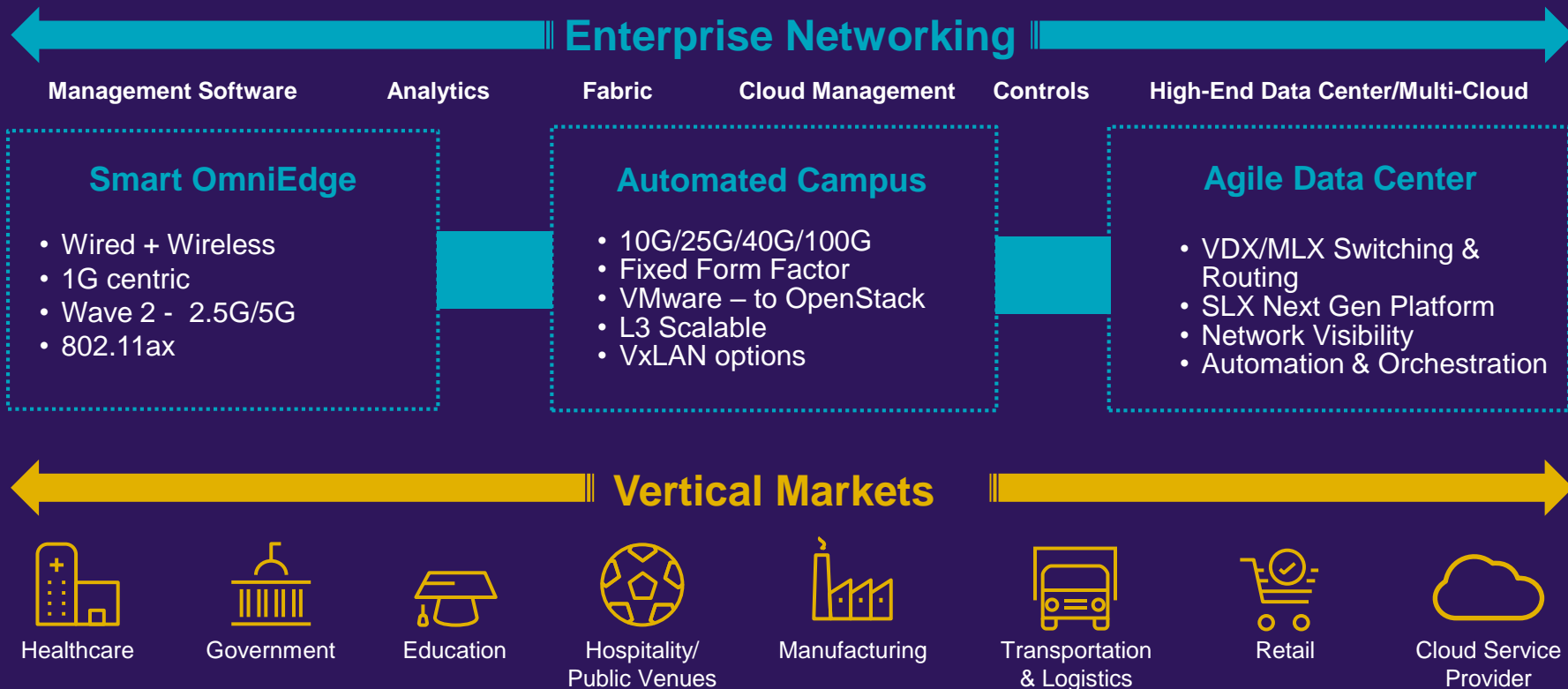
#3 Enterprise End-to-End Networking Vendor*



*Source Dell'Oro

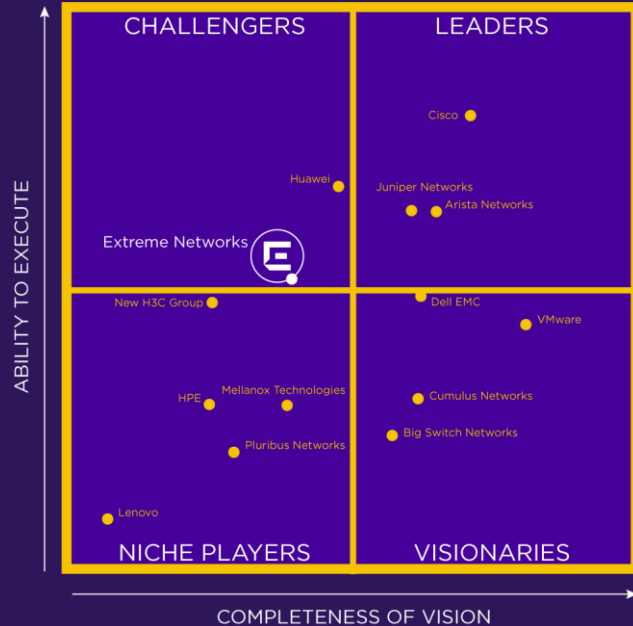


Play to Strength



Industry Analyst Verified

2018 Data Center Magic Quadrant



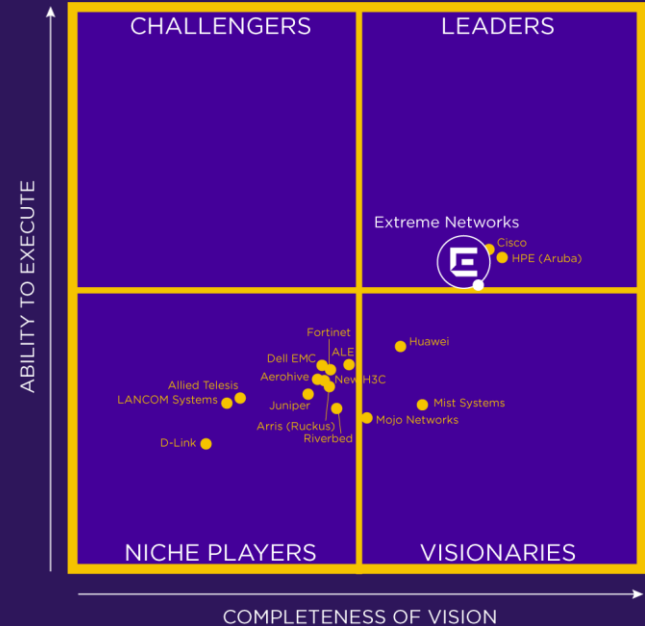
Gartner also ranks us as a Challenger in the 2018 data center magic quadrant.

This graphic was published by Gartner, Inc. as part of a larger research document and should be evaluated in the context of the entire document. The Gartner document is available upon request from <https://extr.co/2upPsQQ>

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2018 LAN/WLAN Magic Quadrant



Gartner also ranks us as a Leader in the 2018 LAN/WAN magic quadrant.

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Industry Verified

#1 Ranked Service/Support – Gartner

As of September 30, 2018
Extreme Networks has an
Overall Rating

of **4.8** out of 5






in the
**Data Center
Networking**
market

based on 128 ratings

89% of reviewers would recommend
Extreme Networks

82% would recommend Cisco

80% would recommend HPE

	 Extreme	 cisco	 Hewlett Packard Enterprise
Ease of Deployment	4.4	4.0	4.3
Timeliness of Vendor Response	4.6	4.4	4.4

Extreme is one of the **highest rated** and
most reviewed of the 22 vendors listed

See the reviews at: <https://www.gartner.com/reviews/market/data-center-networking>



Trusted by Over 50% of the Fortune 50



Healthcare



Government



Education



Hospitality



Manufacturing



Transportation
and Logistics



Retail



Cloud
Service Provider



Dynamic Growth Opportunity

Market	Total Market 2018	Market TAM CAGR (2018-2021)	Extreme TAM 2018	Extreme TAM CAGR (2018-2021)
Wireless LAN	\$6.5B	9.4%	\$4.5B	8.8%
Premise Managed	\$5.2B	6.1%	\$3.6B	5.5%
Cloud Managed	\$1.3B	20.9%	\$0.9B	20.3%
Data Center	\$13.4B	5.9%	\$9.5B	2.8%
Rest of Enterprises	\$3.6B	-17.1%	\$3.6B	-17.1%
Large Enterprises/Private Cloud	\$3.0B	11.3%	\$3.0B	11.3%
CSP	\$2.9B	12.7%	\$2.9B	12.7%
Others*	\$4.0B	14.2%	-	-
Ethernet Switching and Campus LAN	\$11.7B	2.5%	\$7.7B	0.8%
Enterprise Edge	\$9.8B	3.4%	\$6.5B	1.7%
Enterprise Core	\$1.9B	-2.5%	\$1.3B	-3.9%

Notes:

- Based on Extreme estimates utilizing Gartner, IDC, Dell'Oro Group and publicly available information





Enterprise Strategy Group | **Getting to the bigger truth.™**

The Changing IT Landscape

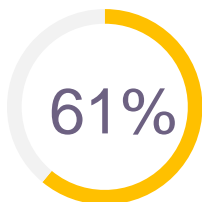
BOB LALIBERTE

October 11, 2018

The IT Environment is Evolving...



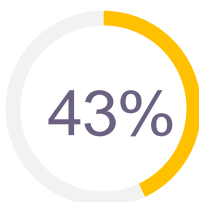
TRANSFORMATION



in process or
beginning



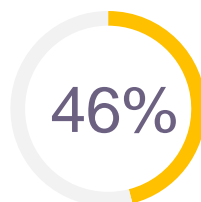
IoT



launching in next
12 – 24 months



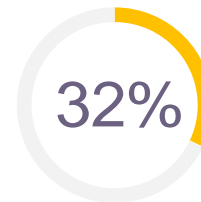
MULTI CLOUD



cite running
production apps



STREAMLINE



Network is the #2
response behind
storage to streamline
infrastructure
and operations



IT JUSTIFICATION

IMPROVED:



Security 36%



Employee
Productivity 31%

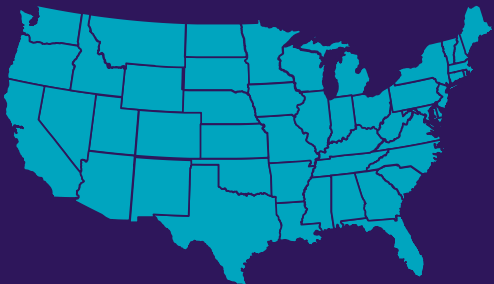


Customer
Satisfaction 29%

...the network is more relevant

The Stadium Market Opportunity

Total Hospitality Market is ~\$700M/Year
End Market Growing Low-single Digits



US Market Profile

- **Stadiums and Arenas:** >2,850
- **Addressable Market Opportunity:** \$800M
 - Professional Stadium and Arena Venues (NBA, NHL, NFL, MLB): 120
 - Division One University Stadiums and Arenas: >400
- 98% penetration for Analytics in the NFL



European Market Profile

- **Large Stadiums and Arenas:** ~455
- **Addressable Market Opportunity:** \$660M
 - Soccer/Olympic and Other Stadiums: 270
 - Indoor Areas (Music/Hockey/Other/Under Construction): 185

Average Product Sale

- Stadium Venues (Wi-Fi, IDFs, Core): \$1.3M-\$2.5M
- Arena Venues (Wi-Fi, IDFs, Core): \$350k

Digital Transformation

Transforming the Edge Experience

DAN DULAC
VP, Solutions Strategy



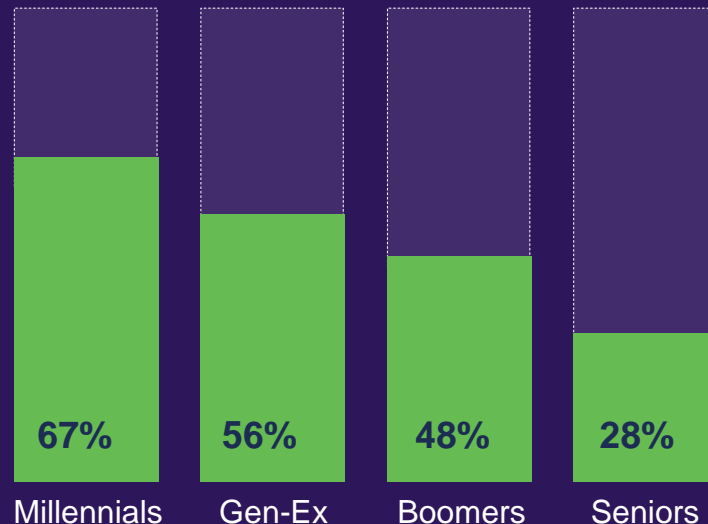
Mobile Domination

Online Shopping



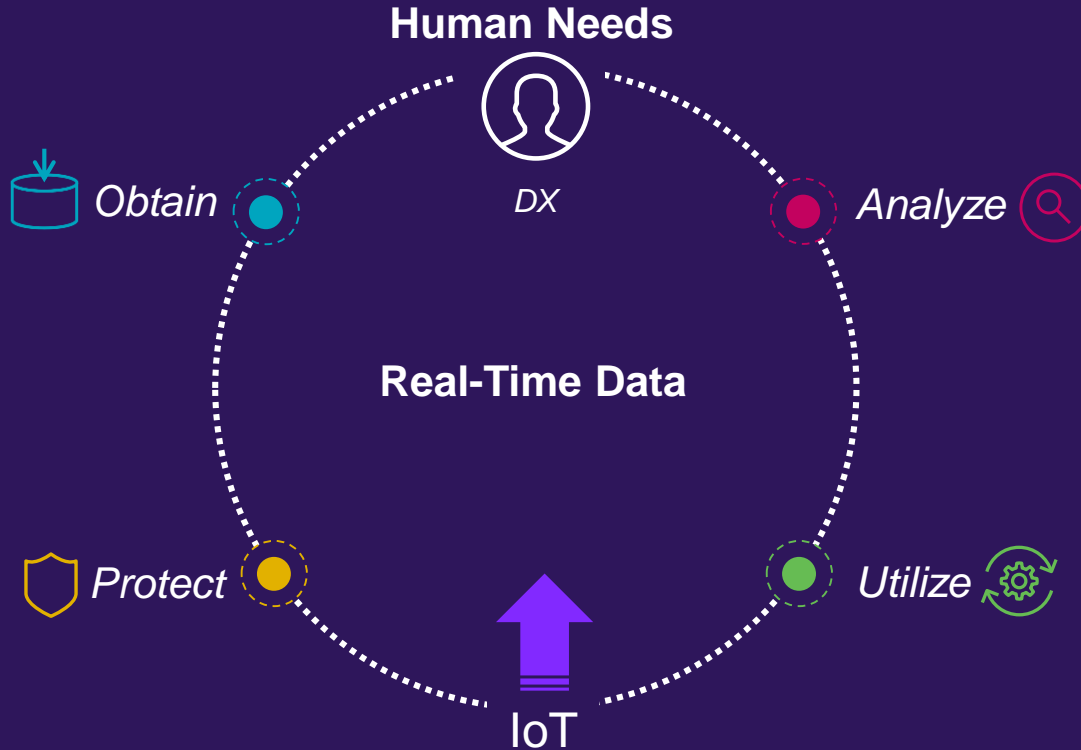
The **digital world** has **radically** changed **consumer behavior** and **expectations**.

Retail Consumers*

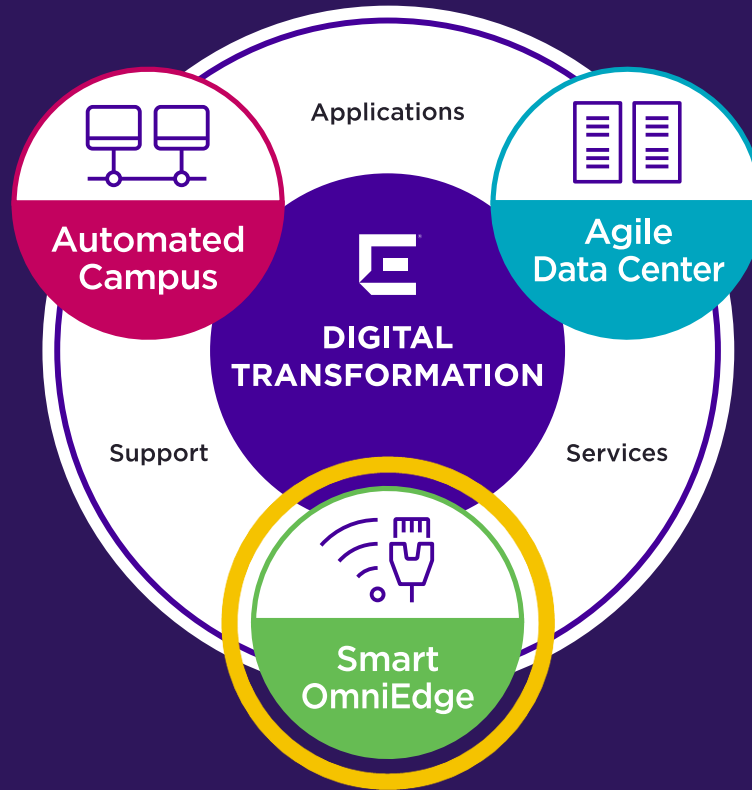


*Source: Forrester

What is Digital Transformation [DX]?



A Platform to Enable Digital Transformation



Smart OmniEdge

**Pervasive
Intelligence**



**Business
Adaptive**

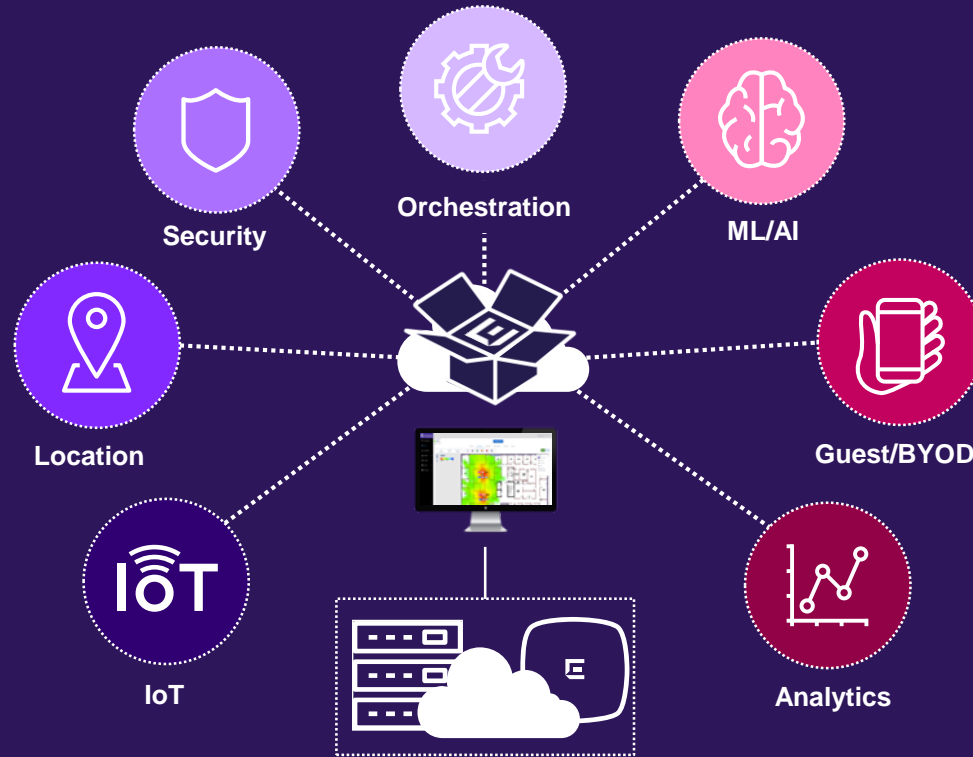


**Intrinsically
Secure**



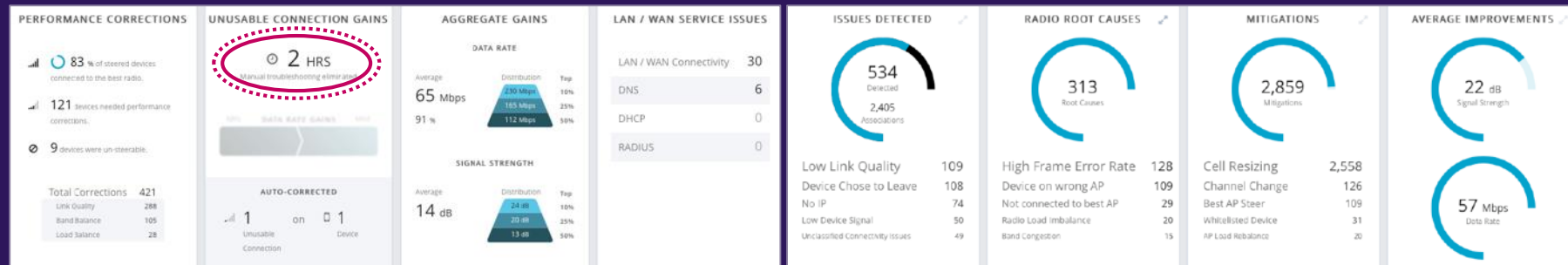
Transforming the Edge Experience

Unified Applications – Shifting From Traditional



Smart OmniEdge - Machine Learning Example

- Extreme's first machine learning solution
 - Works with private cloud on-premise and public cloud deployments
- Self-optimization and autonomous-correction from learned history, events, users, devices, and environments
- Incredible KPI's to validate and prove performance gains!



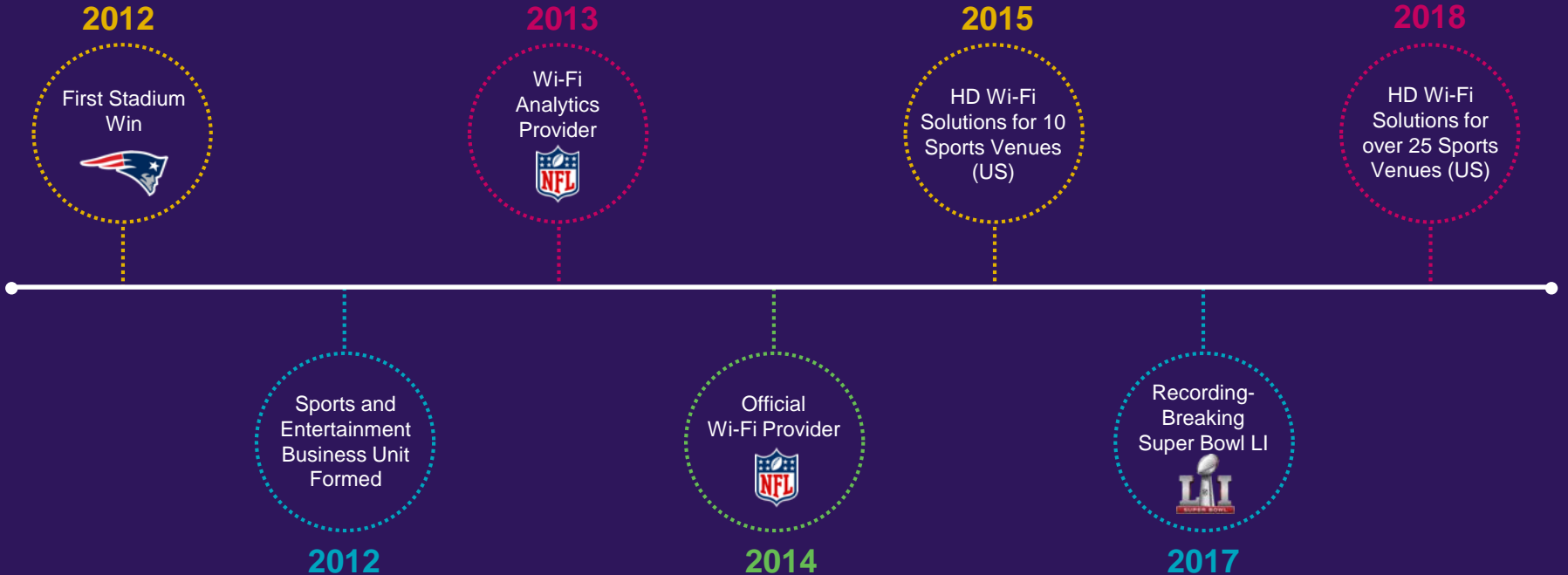
Delivering High-Density Wi-Fi Solutions

JOHN BRAMS

Director, Sports and Entertainment



Sports and Entertainment Business Unit



Reaching Extreme Heights



OFFICIAL WI-FI SOLUTIONS PROVIDER OF THE NFL



New England Patriots



Tampa Bay Buccaneers



Tennessee Titans



Jacksonville Jaguars



Cincinnati Bengals



Miami Dolphins



Seattle Seahawks



Baltimore Ravens



Green Bay Packers



Buffalo Bills



Houston Texans



OFFICIAL WI-FI ANALYTICS PROVIDER OF THE NFL



SF 49ers



New York Jets



New York Giants



Philadelphia Eagles



New Orleans Saints



KC Chiefs



Atlanta Falcons



Cleveland Browns



Denver Broncos



Chicago Bears



Arizona Cardinals



Carolina Panthers



Pittsburgh Steelers



Indianapolis Colts



Detroit Lions



Washington Redskins



Minnesota Vikings



Collegiate Market



- University of Florida
- Ben Hill Griffin Stadium
- Largest stadium with 91,000+ in Seating
 - Full solution portfolio including
 - Smart OmniEdge
 - ExtremeAnalytics



Ben Hill Griffin Stadium, Florida



- Brigham Young University
- LaVell Edwards Stadium
 - Full solution portfolio including
 - Smart OmniEdge
 - ExtremeAnalytics



LaVell Edwards Stadium, Utah



International Market



- FIFA 2018, Russia: Switching, Network Management
- Stadiums Include:
 - Ekaterinburg Stadium
 - Volgograd Stadium
 - Kaliningrad Stadium
 - Novgorod Stadium



Volgograd Stadium, Russia



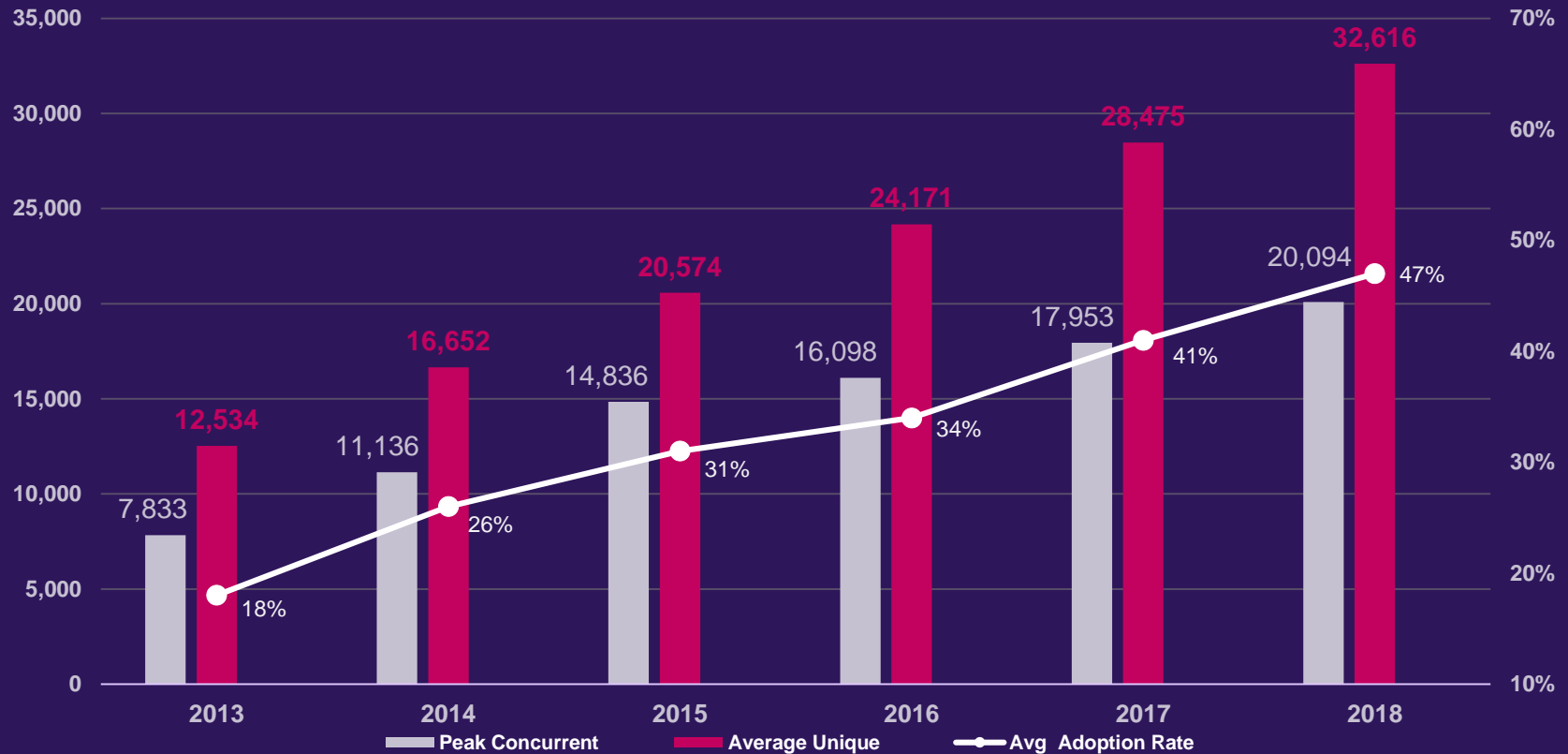
- Borussia Mönchengladbach
- Borussia Football Club
- Smart OmniEdge, Agile Data Center, Automated Campus
- Additional German Stadiums:
 - Olympiastadium, Berlin
 - Signal Iduna Park, Dortmund
 - Volksparkstadion, Hamburg



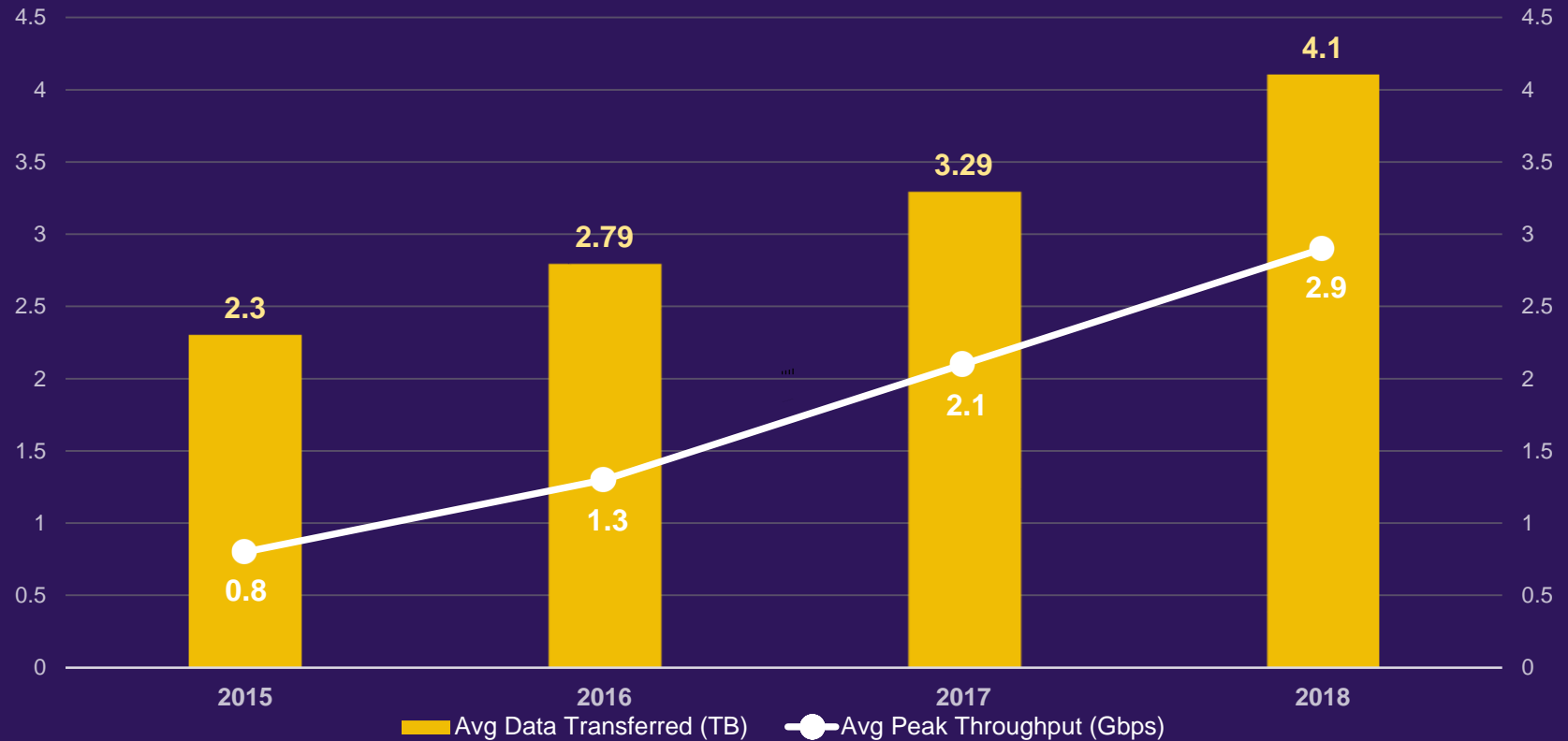
Borussia Mönchengladbach, Germany

Wi-Fi Usage

Average Unique, Concurrent and Peak Adoption Rates

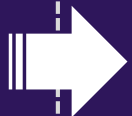


NFL Average Data Transferred and Peak Throughput



Apps Everywhere — The Challenge

How Do I Get
True Visibility?



Typical Wi-Fi Visibility

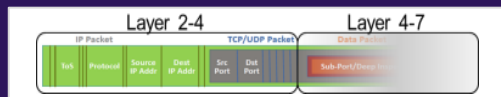


of Wi-Fi Clients

Client IP Addresses

HTTP=Port 80

HTTPS=Port 443



Typical Visibility of
Carrier Network



Reports from Carrier





ExtremeTM

Customer-Driven Networking

WWW.EXTREMENETWORKS.COM

