Service Provider Insights
For enterprise users of Global Network Services

GTT Communications, Inc.

A Better Way to Reach the Cloud
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New Paradigm Resources Group, Inc.’s Service Provider Insights examines telecommunications carriers, managed service providers, and other providers of technology based services. Our objective is to examine providers that have developed new approaches for addressing end-user communications, networking, and collaboration requirements and present these providers to enterprises looking for viable networking alternatives.

**Our Intended Audience**

This report was prepared for the decision-makers involved in identifying and selecting IT solutions and network service providers for businesses requiring an integrated network solution for multiple international locations.

**EXECUTIVE SUMMARY**

Chief Information Officers (CIOs) are operating in a new environment: it’s global, it’s cloud-based, and the requirement for information security is greater than ever. Most enterprise CIOs have recognized the opportunity to reduce their information technology (IT) infrastructure investments and associated operating costs by moving much of their business operations to the cloud. This is especially true for multinational corporations with people and facilities in geographically dispersed locations.

Connecting to the cloud means connecting to data centers around the world where cloud service providers host their applications. The traditional way of connecting to the cloud has been to buy connections from incumbent carriers. While these established carriers offer predictability and reliability, they frequently display a lack of agility and flexibility in adapting to their enterprise customers’ specific needs. Incumbent carriers’ service provisioning timeframes are too long, their network reach is limited, they all offer similar broadband connections, and their services are, on balance, expensive.

**The question is: Is there a better way to reach the cloud?**

This report considers that question and examines the capabilities of one network service provider, GTT Communications, Inc. (GTT), and how it addresses multinational enterprises’ networking requirements within the context of the new global operating environment.

GTT operates a global tier 1 IP network and has strategically crafted its business from the ground up to address the networking needs of multinational businesses that require secure, flexible, and customized cloud connectivity and managed services.
Reflected in this report are compelling reasons why multinational enterprises should consider GTT as their network service provider of choice.

**REACHING THE CLOUD IN A MULTINATIONAL ENVIRONMENT**

**THE EVOLVING GLOBAL ENTERPRISE & NETWORKING REQUIREMENTS**

The interconnectedness of the world’s economy continues to have profound effects on multinational enterprises, presenting them with new opportunities as well as new challenges. While the ever increasing globalization of the worldwide economy opens new markets, it also creates intense competition, forcing enterprises to adopt innovative IT models in order to succeed in the constantly evolving economic environment.

Global businesses are now tapping into previously inaccessible computing and human resources by deploying advanced IT platforms in data centers around the world. Complementing the deployment of enterprise-owned computing infrastructure are cloud-based services that provide multinationals with best-in-class computing applications from any location. Enterprises have recognized the value “virtualization” brings in various forms, including freeing staff from managing and maintaining IT infrastructure, and allowing them to focus on enhancing higher-level aspects of the business. As a result, many enterprises are virtualizing in-house computing resources and migrating them into the cloud.

Together, these developments put an unprecedented importance on the network. Multinational enterprises require cloud-connectivity and WAN service providers who can, at a minimum, provide:

- Connectivity between any two points based on enterprise requirements, not carrier capabilities;
- Unfettered access to any data center globally;
- Access to emerging technology solutions, such as virtualized platforms;
- Efficient scaling as the organization grows;
- Fast installation to address rapidly changing requirements;
- Access to corporate resources from any office and any location;
- Superior capabilities to deliver required application performance and user experience;
- High security levels to maintain data integrity and to prevent unwanted intrusions; and,
- Access to best-in-class applications.
Finding service providers that can address these requirements is often challenging for enterprises. It requires CIOs to break from the default route of simply signing with an established global telecom carriers. While this may address the enterprise’s immediate needs, it may ultimately come up short in addressing their overall requirements.

A few points help underscore this. First, large incumbent telcos have an established history of operating in a tariff-based environment in which the services they provided were carefully prescribed and there was little, if any, flexibility in addressing customers’ unique requirements. This history continues to color how these carriers operate today. As a result, they often cannot provide the flexibility to address multinational enterprises’ rapidly shifting networking requirements. Additionally, these legacy carriers are committed to bundling services that may miss the mark when it comes to an enterprise’s unique needs.

Cloud computing is the key IT business driver for enterprises today. In selecting a network service provider to reach the cloud, CIOs need to consider factors such as network reach, available bandwidth, flexibility, security, time-to-provision, customer support and cost. Enterprises seeking to implement a “cloud first” strategy will therefore need to consider these and other factors to effectively migrate their IT operations to the cloud. Other factors include:

- Determining the right mix of public and private cloud solutions.
- Deciding how much current IT infrastructure to keep on site.
- Assessing how regulatory compliance requirements may be affected.
- Identifying data centers in which to collocate off-site infrastructure.
- Developing data back-up and disaster recovery plans and the appropriate tools to use.
- Developing network security strategies.

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1 These global carriers include: AT&T, BT, Deutsche Telekom, NTT, Telefonica and Verizon, among others. Each is firmly tied to legacy networks that often rely on older technologies to support customer network requirements. This, in turn, limits these incumbent global carriers’ flexibility to nimbly adjust to changing global enterprises’ needs.
For multinational enterprises, there is an additional critical consideration:

- Identifying a global network service provider that can address the current and future multi-location networking requirements for that enterprise.

For businesses with offices located solely in one country, these considerations are often relatively straightforward. However, the requirements that multinational entities face are often more stringent and include:

- **Highly reliable and redundant access** to resources that are available on a global scale, including personnel, computing, information, collaboration, and communication resources;
- **Solution flexibility** with connectivity services deployed when and where they are needed anywhere in the world; and,
- **Integrated security** to address the exposure the organization faces as it moves from the “walled garden” IT environment, in which all infrastructure and assets are operated in-house, to the more open cloud-based world.

Meeting these requirements means finding a network service provider that is able to:

- Reach any location in the world
- Assure network-based security
- Understand the increasing importance of flexible cross-border connectivity
- Provision and turn-up circuits and services in a timely manner
- Willingly provide service to locations that may be difficult to reach
- Provide reliable access to global resources and applications
- Be flexible in addressing any multinational enterprise’s unique networking requirements
- Scale quickly as the organization grows
- Leverage established local access partnerships for last-mile connectivity
- Offer network resiliency and route diversity
- Provide superior customer care and attention

These requirements heighten the challenge that multinational enterprises face when identifying and selecting the service provider that is best able to address their unique needs. Too often, though, decision-makers take the default approach of selecting a legacy global carrier to help them connect international locations. While these carriers may provide familiar and comfortable solutions, they tend to offer commodity-like network services, are often slow to deliver and are generally not agile enough to respond to an enterprise’s specific requirements.
CONSIDERING SERVICE PROVIDER OPTIONS

Today, bandwidth and connectivity services are commodities with little difference from carrier to carrier. CIOs should look for characteristics in a networking provider that set it apart from the rest of the pack. Is the provider’s unique selling proposition something that goes above and beyond the traditional commodity-like services that meet the enterprise’s cloud-enablement requirements?

Here is what CIOs should avoid:

A common approach global carriers take is to combine different services into “bundled” solutions. More often than not, these service bundles fail to address the unique connectivity and bandwidth requirements of multinational enterprises, and they often contain features and options that customers neither need nor want. This adds an unnecessary level of confusion to the decision-making process.

Here is our recommendation to CIOs when developing a strategy for reaching the cloud:

CIOs should look for a network provider that is focused on supporting their cloud computing needs and providing access to required business applications. CIOs will benefit from working with a service provider that puts more priority on network performance and less on service bundles, and one that is truly interested in cloud-enablement for their enterprise.

Instead of service bundles that are offered in a “one-stop shop” approach, CIOs should expect to select from a menu of the “best of” services that can be tailored to their specific requirements, and offered cost-effectively. They should look to a carrier that has the flexibility to deliver any cloud-based application to any of the enterprise’s locations in a consistent, highly secure manner. More importantly, CIOs should expect to develop a close relationship with a network provider that can flex and adapt as the enterprise changes.
CUSTOMER PERSPECTIVE

Kha Phan, a solutions architect with over 15 years in telecom networking and an advisor to multinational enterprise CIOs, gets to the point, “It’s all about getting to the cloud.”

When picking a networking service provider, he says, CIOs must consider flexibility and risk. Is the carrier flexible enough to address the “needs and wants” of the multinational? Does the multinational believe that a mid-tier service provider can offer better customer service than a legacy global carrier?

Network services are commodities, so pricing, flexibility, agility, and value become key differentiators. Larger carriers often are unable or unwilling to provide “one off” solutions and may not accommodate many multinationals’ unique requirements. “GTT is willing to work with the customer. They start with: What are you trying to do? And what do you need?”

It’s a myth that mid-tier service providers do not have the network reach to service multinationals, Phan says. Incumbent carriers buy and sell last-mile access from local providers like everybody else. GTT does it well because it has resale expertise and a legacy with hundreds of access providers around the world.

Reaching international locations can be challenging. Legacy carriers charge customers based on cost to connect; that gets expensive. GTT regularly came in at “50% of the cost, with 10 times the bandwidth.”

Multinationals are increasingly dependent on network-based security, but require simplicity. GTT’s network-based firewall service is one of the best; even carriers like Verizon resell it.

Enterprises must determine the best network for their budget, while keeping network connectivity separate from applications. If the carriers cannot cost-effectively connect to remote locations, the enterprise will undersize the bandwidth to these remote locations, just to reach the cloud. Dynamic and bursty capacity only makes sense when bandwidth is expensive.

Phan says: Legacy carriers all offer cloud solutions and all are attempting to differentiate commodity services. GTT is willing to say “tell us what you want and let’s make it happen!”
EVALUATING GTT: CARRIER BUSINESS CONSIDERATIONS

COMPANY SNAPSHOT

Headquartered in McLean, Virginia, GTT Communications (GTT), a public company (NYSE: GTT) was founded in 1998. The company employs more than 500 people across its 17 international offices (See Appendix A). GTT’s global network consists of more than 250 Points-of-Presence (PoPs) with services in more than 100 countries around the world.

CARRIER STRATEGY

GTT operates a global Tier 1 IP network that is designed to connect to any location in the world, and any application in the cloud. The company’s objective is to provide networking solutions that allow its multinational enterprise customers to advance productivity through immediate and secure access to data and cloud-based applications. GTT’s mission is to provide a better way for multinational customers to reach the cloud.

The company operates on three core values: simplicity, speed, and agility. GTT focuses on simplifying connectivity solutions for its multinational customers and reducing the time required to establish cloud connections over a highly-reliable and secure network, all supported by exceptional customer service.

Unlike its larger competitors, GTT offers multinational enterprise customers flexible and cost-effective delivery alternatives to reach the cloud through its “any-to-any” portfolio of cloud networking solutions. GTT is a highly ranked global network service provider. Its growing ability to address the fluid needs of multinational customers is reflected in its sustained and rapid growth.

GTT has three main growth initiatives. These are to:

- Extend ubiquitous network connectivity to locations and cloud applications around the world;
- Expand cloud networking services to multinational clients; and
- Deliver a superior client experience.

The company’s roots lie in reselling services from other carriers to multinational customers. In the process, GTT has established a long list of local access carrier partnerships around the world and has extensive expertise in managing these relationships. As a result, GTT has the flexibility to deliver private, public, and hybrid cloud network solutions for connectivity to any location in the world and with any application in the cloud.

GTT’s expansive network and geographic reach allows the company to cost-effectively deliver the bandwidth, scale, and security demanded by its multinational, multi-location customers.

2 See, for instance, Dynamic Network Services, Inc. (Renesys) analysis.
**Financial Strength & Viability**

Multinational enterprises want to know that their network service provider will be around for a long time. As such, financial strength and viability remains a key consideration for enterprises when selecting a network service partner.

Enterprises look for service providers with strong bottom lines. Profitable operations reflect the ability of a network service provider to expand its portfolio of services as well as invest in its underlying network, while continuing to provide high customer care levels.

In its latest financial results for the nine-month period ending September 30, 2015, GTT reported telecommunications services revenue of $254.4 million, up 75.8% from $145 million in the same period in 2014. Since 2010, the company’s annualized revenues as of September 30, 2015 have grown at a 37% CAGR.

![Figure 2: GTT’s Financial Performance – 2012-2016e](image)

Source: GTT Communications, Inc.; NPRG estimates

As of the third quarter of 2015, GTT reached its financial objectives of $400 million in revenue and $100 million in adjusted EBITDA. GTT established its next set of financial objectives to reach $1 billion in revenue and $250 million in adjusted EBITDA within the next five years.

**Network Reach & Capabilities**

GTT owns and operates an expansive core network that is complemented by the partnerships it has established with over 2,000 local access providers around the world. The company also has a presence in virtually all major data centers internationally. This architecture allows GTT to connect any points globally and provide customized connections to global cloud-based resources.
A critical aspect of GTT’s network approach is its local access provider partnerships. These arrangements offer certain advantages to GTT that translate into superior service for multinational enterprise customers. This diverse set of partnerships provides GTT with the flexibility to offer a range of access solutions to address customers’ connectivity requirements that may vary from one region to the next.3

This extensive array of local partners ensures that GTT can always provide service to any customer location. With these partners in place, GTT does not have to construct facilities to a location or provision local lines itself. The result is that GTT is able to quickly and efficiently provision its services to any customer location.

GTT’s local partnerships free it from having to own, operate and maintain legacy wireline infrastructure. Therefore, it is not tied to older technologies and it has the flexibility to choose the best access solution available to address its customers’ particular requirements at any specific location. Wherever GTT needs to establish cloud networking connections for multinational customers, it leases backbone and local access capacity through one of its established partnerships and can then quickly provision its service.

This network strategy is key to GTT’s speed, agility and flexibility in provisioning services for its multinational customers and provides GTT with a distinct competitive advantage.

<table>
<thead>
<tr>
<th>Points of Presence (PoPs)</th>
<th>250+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Country Deployments</td>
<td>Over 100</td>
</tr>
<tr>
<td>Diverse Backbone Wavelengths</td>
<td>10G/100G</td>
</tr>
<tr>
<td>Core Network</td>
<td>100% Juniper Routers</td>
</tr>
</tbody>
</table>

Source: GTT Communications, Inc., NPRG estimates

GTT is expanding its geographic coverage by adding new PoPs, both through its own placements in data centers and through the acquisition of other carriers. The company’s service expansion is largely customer-driven, which means that GTT is providing its multinational customers with the high capacity connections and managed services they require and demand, at the locations and times they need them. Consequently, GTT designs, delivers, and manages cloud-networking services in all six populated continents around the world (See Figure 3).

3 Through its local access partnerships, GTT is able to provide its multinational enterprise customers with a complete range of access interfaces including DSL/ADSL, cable modem, wireless 3G/4G, dry copper loops and fiber.
For the fiscal year ending December 31, 2014, GTT reported that approximately 58% of its revenue was attributed to services delivered in the United States, 40% based in Western Europe, and the remaining 2% from operations in other countries (Figure 4).

GTT’s global, proprietary Ethernet and Internet Protocol (IP) backbone is one of the most interconnected service platforms in the industry. According to industry sources, this IP backbone is consistently a Top-5 network in the world in terms of IP routes.4

**LAST-MILE CONNECTIVITY PARTNERSHIPS**

GTT has network-to-network interfaces (NNIs) with all major local telephone, cable MSO and interexchange carriers in the U.S. and internationally, so it can readily reach any customer endpoint.

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4 Source: Dynamic Network Services, Inc. (Renesys) analysis.
Each local access partner provides various types of connectivity, allowing GTT to identify and select solutions that best serve customers’ specific requirements.

Last-mile connectivity is a competitive advantage for GTT because it allows the company to:

- Establish connections for its customers typically in a much shorter timeframe than the large legacy carriers can; and,
- Reach locations beyond the PoPs that other carriers cannot, or will not, due to substantial expense and time-to-deploy.

**Target Customers & Key Accounts**

GTT focuses on multinational enterprises that have distributed operations, numbering anywhere from a few remote sites to hundreds of facilities around the world. To support these types of operations, the company can deliver scalable bandwidth from broadband speeds from T1 through 100G and higher. At the-end of the third fiscal quarter of 2015, GTT’s customer base tallied over 4,300 businesses. The mix of vertical markets is broad and includes carriers, technology and manufacturing companies, business and financial services firms, retailers, healthcare organizations, and government agencies.

**Figure 5: GTT Sales by Customer Type, Q3 2015**

Source: GTT Communications, Inc.; NPRG estimates

Figure 5, above, shows a breakdown of GTT’s 2014 revenues by major customer groupings. Enterprises accounted for 59% of these. Selling services to other carriers made up 31%, with sales to Government entities making up the remaining 10%.
Evaluating GTT: Service Portfolio

Multinational enterprises have specific data networking needs and requirements that include:

- Reliable, high-speed connections among their operations around the world, wherever they may be located;
- Reliable, high-speed access to websites and social media over the public Internet;
- Reliable, proprietary high-speed access to cloud-based services needed to run their business;
- Options to lower operating costs by outsourcing equipment, management and related services; and,
- Confidence that these data communications requirements can be addressed in a secure, protected environment.

To address these requirements, GTT’s product portfolio centers on four primary service offerings as summarized in Table 2. This service set includes:

1. Cloud Connectivity & Wide Area Networking;
2. Global Internet Services;
3. Globally-available Managed Services and Security; and
4. Global Voice and Unified Communications

Table 2: GTT Service Portfolio

<table>
<thead>
<tr>
<th>Internet Connectivity</th>
<th>Wide Area Networking</th>
<th>Managed Services</th>
<th>Voice and UC</th>
</tr>
</thead>
<tbody>
<tr>
<td>High Bandwidth Internet Services for Enterprises &amp; Carriers</td>
<td>High Capacity Enterprise Layer 2/3 Global WAN solutions</td>
<td>Complete Turnkey Solutions</td>
<td>SIP-based Enterprise Communication solutions</td>
</tr>
<tr>
<td>Global Reach</td>
<td>Guaranteed bandwidth on-demand, burstable capacity</td>
<td>Managed CPE: Firewalls, Routers, Switches, WiFi</td>
<td>Global coverage, standardized pricing</td>
</tr>
<tr>
<td>Advanced BGP Communities</td>
<td>Ethernet and MPLS IP-VPN technologies: EPL, EVPL, VPLS, MPLS IP-VPN, IP Sec VPN</td>
<td>Managed Security: UTM, IDS/IPS, SSL/TSL, Content Filtering, Anti-Spam</td>
<td>SIP trunking, hosted PBX, contact center, call center and routing tools</td>
</tr>
<tr>
<td>Fixed CDR or Burst Model</td>
<td>Over 2,000 regional partners for last-mile connectivity</td>
<td>PCI/DSS Compliance &amp; Reporting</td>
<td>Global, Sonus Networks-based SIP network with nodes on five continents</td>
</tr>
<tr>
<td>High bandwidth connectivity; broadband access</td>
<td>Flexible Deployment Options: Multi-layered cloud-based or customer premise</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: GTT Communications, Inc.
Cloud Delivery Networking & WAN Connectivity

GTT’s Cloud Delivery Network is the fabric that binds multinational enterprise headquarters with branch locations. It also enables flexible best-in-class access to cloud service providers and the public Internet, as shown in Figure 6.

[Figure 6: GTT’s Network Topology]

This cloud delivery network enables GTT to connect thousands of locations as a single private network. The company’s EtherCloud services provide Layer 2 and Layer 3 private networking services in flexible topologies.

Global Internet Connectivity

Multinational enterprises rely on cost-effective Internet access to serve their varied operations. GTT’s presence in global data centers offers companies direct connections to leading cloud service providers such as IBM Cloud, Amazon Web Services (AWS), and Microsoft Azure.

Customers can select the services that best meet their networking requirements:

- Fast Ethernet, Gigabit Ethernet (GigE) and 10G/100G Ethernet ports;
- Fixed committed data rate (CDR) or burst data bandwidth options;
- Support for IPv4 and IPv6.

Broadband Internet is ideal for hard-to-reach endpoints such as franchised retail stores that need to connect hundreds of sites, or companies staffed with remote workers who need reliable Internet access. More importantly, these customers can use readily available interfaces such as DSL/ADSL, cable modem, wireless 3G/4G, or simply a dry copper loop.
MANAGED SERVICES AND SECURITY

As enterprises migrate operations to the cloud, security and reliability of their data over a non-
proprietary network is paramount. GTT’s Managed Services allow its customers to outsource
operations and maintenance of network and access security in two main areas:

- Customer Premise Equipment (CPE); and,
- Network-based security.

Managed CPE services include management of routers, appliances, switches and wireless access
points, all backed by move, add, change, replacement and disconnect support. Customers benefit
from this approach because they only need minimal internal resources to coordinate with GTT, yet
enjoy high performance from a customized solution.

Managed Network Security services are increasingly important to enterprise CIOs and IT managers,
as their firms move operations from behind corporate firewalls to the cloud. GTT offers several levels of
security that can be implemented either at the enterprise gateway, or within GTT’s network.
Standard security services include: transport layer security (TLS) and unified threat management
(UTM). For retail industry and merchant accounts, GTT assures that data connections meet Payment
Card Industry Data Security Standard (PCI DSS) compliance specifications.

VOICE AND UNIFIED COMMUNICATIONS (UC)

To ensure cost-effective and efficient global communication, enterprises need a single provider that
can deliver complete global coverage. GTT’s Enterprise Communications are a suite of voice and UC
services that enable its clients to seamlessly communicate and collaborate regardless of location or
existing communications hardware:

- **Enterprise SIP Trunking**: Delivers collaboration through integration of voice, video and chat
  over a single connection. The service includes a secure trunking option, inclusive of TLS and
  SRTP.
  - Compatible with major UC platforms including Microsoft Lync 2013, Cisco, Avaya and
    ShoreTel
- **Enterprise PBX**: May be deployed in a hosted or hybrid model, providing employees with one
  number they can access from anywhere.
  - Includes full PBX features inclusive of call transfer, music on hold, voicemail, unified
    messaging, company directory, receptionist and enhanced call routing
- **Enterprise Call Center Service**: Delivers advanced functionality without the capex of
  traditional call center solutions.
- **Enterprise Contact Center**: Fully integrated, multichannel platform, encompassing voice,
  email, chat, social networks and SMS.
- Enterprise Call Route - Complete routing control of domestic and global DIDs and toll free
  numbers across offices, call centers and locations.
- Enterprise Skype for Business - Advanced collaboration capabilities of Microsoft Lync 2013,
  delivered as a service.
  - Dedicated, managed offering, that includes full Enterprise Voice functionality
EVALUATING GTT: STRATEGIC CONSIDERATIONS

GLOBAL CLOUD CONNECTIVITY

For CIOs at multinational enterprises, “It’s all about getting to the cloud.” GTT’s business is cloud networking. The company offers a full portfolio of services that enables multinational enterprises to move their IT operations to the cloud, and to take advantage of cloud computing and applications.

Driving GTT’s growth is its ability to serve its multinational customers with a state-of-the-art global IP network, a rich portfolio of services, its agility and speed in provisioning new services, and a high-touch approach to customer service. Although these attributes may seem cliché, NPRG’s research confirms that GTT is living up to its billing. Although GTT is not always mentioned as a first choice, it is nonetheless viewed in the industry as a strong alternative to legacy international carriers. For all the reasons discussed in this report, GTT’s reputation as an agile and flexible provider of cloud networking services is building. As a result, GTT is increasingly being considered as a first choice to provide multinational enterprises’ networking and cloud connectivity services. To continue to differentiate itself and gain a competitive edge, GTT is leveraging a number of key strategic initiatives as discussed below.

CLOUD SERVICE PROVIDER AGNOSTIC

GTT puts its priority on customers’ needs for cloud-based applications and services without favoring particular cloud service providers or particular data centers. In every global data center where GTT operates a PoP, the company connects to the cloud service providers in that data center.

SERVICE PROVISIONING SPEED

Legacy carriers initiating service for a multinational enterprise often require months to establish network connections that involve a multitude of long haul and local access providers located across multiple countries. In contrast, GTT is striving to reduce the time-to-provision for its customers to just weeks or even days through its established relationships with over 2,000 local access providers worldwide.

THE CUSTOMER EXPERIENCE

GTT offers a variety of bandwidth billing options including flat rate, tiered and burstable choices for true on-demand services without overpaying for idle capacity. Alternatively, aggregate CDRs can be shared across multiple ports in multiple locations. With this flexibility, clients are guaranteed available bandwidth whenever and wherever they need it.

When presented with complex, challenging customer networking requests, GTT is willing to work with these customers to provide a cost-effective solution to connect all locations. As the company puts it “We look for ways to say ‘Yes’ to the customer.” This flexibility was also noted by enterprise customers with whom NPRG spoke over the course of our research.
GTT takes pride in making it easy for clients to work with its staff and in providing its clients with an exceptional customer experience. Each GTT client is assigned a dedicated Account Executive who is empowered to adapt to the specific needs of the customer. GTT’s Global Network Operations Centers (NOCs) operate on a 365 x 24 x 7 basis to resolve service issues while continuously monitoring clients’ networks.

Scoring GTT’s Capabilities

Based on our research and analysis of GTT, NPRG has found that the company scores high in its ability to address and support its multinational enterprise customers’ network requirements. NPRG’s scorecard (Table 3 below) summarizes how GTT rates across a number of performance parameters. These ratings position GTT well and reflect its ability to differentiate itself against much larger, established and well-known competitors.

<table>
<thead>
<tr>
<th>Value-Add Parameter</th>
<th>Capability to Address Multinational Enterprise Cloud-Networking Requirements</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Low</td>
</tr>
<tr>
<td>Network Reach</td>
<td>✓</td>
</tr>
<tr>
<td>Cloud Connectivity Services</td>
<td>✓</td>
</tr>
<tr>
<td>Local Access Partnerships</td>
<td>✓</td>
</tr>
<tr>
<td>Cloud Provider Agnostic</td>
<td>✓</td>
</tr>
<tr>
<td>Network Security</td>
<td>✓</td>
</tr>
<tr>
<td>Installation Timeframe</td>
<td>✓</td>
</tr>
<tr>
<td>Financial Strength</td>
<td>✓</td>
</tr>
<tr>
<td>Customer Support</td>
<td></td>
</tr>
<tr>
<td>Agility</td>
<td></td>
</tr>
<tr>
<td>Flexibility</td>
<td></td>
</tr>
<tr>
<td>Scalability</td>
<td></td>
</tr>
</tbody>
</table>

Source: New Paradigm Resources Group, Inc.

The IT and networking direction of today’s enterprises are guided by a compass that points in one direction – Toward the Cloud. Businesses are quickly coming to understand the efficiencies the cloud environment offers and are rapidly migrating their applications and infrastructure accordingly. The pressure is on CIOs to implement a “Cloud First” strategy that best matches their organization’s requirements. GTT is well-positioned to be an exceptional partner to work with CIOs to address the networking and managed services components of this strategy.
ABOUT THE AUTHORS

New Paradigm Resources Group, Inc. (NPRG) is a leading strategic consulting and research firm serving innovators in the communications industry. We identify, analyze and forecast emerging trends and technologies, and provide our clients with market data, information and analysis on industry developments affecting their business. Our services support the mission-critical decisions made by service providers, technology developers and financial institutions by enabling them to understand and navigate evolving market conditions.
# Appendix A: Worldwide Sales Office Locations

## USA

**Washington, DC (HQ)**  
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