

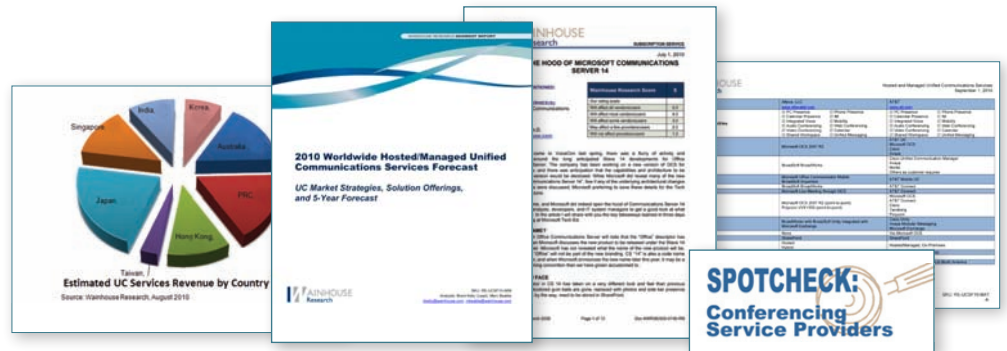
A Unified Communications and Collaboration Market Research Service

The Unified Collaboration Practice (UCP) at Wainhouse Research covers products and services in the following markets:

- Hosted audio, video bridging, and web conferencing services
- Hosted/managed unified communications services
- On-premises unified communications solutions

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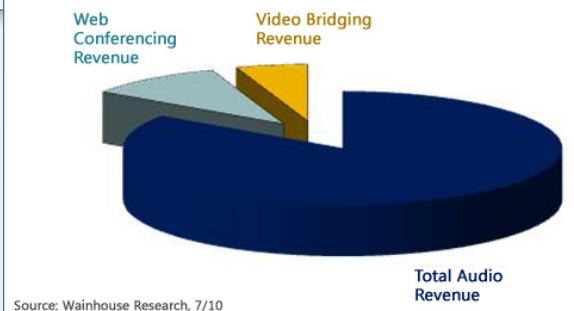
- Multinational UC Vendor

What Coverage Does a UCP Subscription Include?

- Market sizing for Conference Services & Hosted/Managed UC Services (as sold from the technology provider)
- 5-year forecast by major geography (seats, ASP, and revenues); Conferencing Services data for 20 individual countries
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- “SpotCheck Reports” providing quarterly market statistics for conferencing services
- End-user surveys for conferencing services and unified communications products and services
- Research notes on selected hot topics, trends, or technologies
- Matrices comparing vendor offerings

| WW - Total Managed/Hosted UC | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | CAGR |
|-----------------------------------|---------|---------|---------|----------|----------|----------|-------|
| UC Licenses (000) | 1,638.5 | 4,057.2 | 6,679.3 | 11,318.1 | 21,381.4 | 33,950.9 | 83.3% |
| Composite ASP Per UC License (\$) | | | | | | | |
| Total Revenue (\$Mill) | | | | | | | |

Figure 30. Asia Pacific % Market Size by Service Type 2009



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- Those engaged in strategy, insight, and competitive analysis - providing market intelligence to your organization
- Those who advise on and manage unified communications & collaboration services within their organizations

By organization type

- Collaboration and conferencing Service Providers
- UC solution Vendors and product Manufacturers
- Channel Partners: resellers, dealers, system integrators
- Large and small enterprise customers, government agencies
- Educational institutions
- Financial analysts, investment firms, consultants
- End users seeking to understand the market and make better deployment decisions

Unified Collaboration Practice Analysts



Marc F. Beattie is the Managing Partner and Co-Manager of the Unified Collaboration Practice at Wainhouse Research, LLC. Marc is a member of Gerson Lehrman Group's The Councils of Advisors and Vista Research's Society

of Industry Leaders through which he advises worldwide financial clients on technology companies and trends.

He has authored public and private reports on product strategies, distribution structures, emerging technologies and industry applications. He is a featured speaker and moderator at industry conferences and private company events - specializing on the future impact of current technology developments. He regularly consults with end users, established vendors, emerging companies, and the financial community.

Prior to joining Wainhouse Research Marc was an early member of PictureTel and Polycom - holding positions in product management, business development and sales management - and spent 13 years working within the industry. He has been an independent analyst and consultant since 1998.



E. Brent Kelly is a Senior Analyst and Partner at Wainhouse Research and Co-Manager of the Unified Collaboration Practice. Brent focuses on all aspects of unified communications and its enabling infrastructure. He has authored

numerous reports and articles on unified communications and contributes regularly to NoJitter.com.

Brent has taught workshops in North and South America, Europe, and Australia as well as at major industry events such as VoiceCon. With 24 years experience in developing and marketing highly technical products, Brent has served as an executive in a manufacturing firm where he developed and implemented a manufacturing, marketing, and channel strategy that helped land national accounts at major retailers. Previously, he was part of the team that built the devices Intel used to test its Pentium microprocessors. He has also led teams developing real-time data acquisition and intelligent design systems for Schlumberger.

Brent has also worked for other multinational companies including Conoco and Monsanto. Dr. Kelly has a Ph.D. in engineering from Texas A&M and a B.S. in engineering from Brigham Young University.

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Wainhouse Research is an independent market research firm that focuses on critical issues in the Unified Communications and rich media conferencing fields. The company conducts multi-client as well as custom research studies for industry vendors and consults with end users on key implementation issues. The firm also publishes a news bulletin, white papers and market statistics, and delivers public and private seminars as well as presentations at industry meetings.