



POLYCOM®

Generating Revenue from HD Video

Stefan Karapetkov
Emerging Technologies Director, Polycom
February 1, 2011

Agenda

- ▶ Momentum of Hosted UC Services
- ▶ Cloud Services: What Makes Sense?
- ▶ What is Needed to Offer These Services?
- ▶ From Hosted Voice to Cloud-based UC Services
- ▶ B2B Communication and the Open Exchange
- ▶ Solutions for Service Providers
- ▶ Summary

We Live in a Hosted World



Momentum of Hosted UC Services

- ▶ *Over the next 5 years overall SMB collaboration services will grow at 43% with the UC and video conferencing subset projected to grow over 400%*

Source: IDC 2011 (U.S. Telecom Service Provider Revenue)



- ▶ *The Worldwide hosted and managed unified communications services market is forecast to be \$6.2B by 2014 with a CAGR of 73%.*

Source: Wainhouse Research 2010 Worldwide Hosted/Managed Unified Communications Services Forecast, RE-UCSF10-WW, Dec 2010



- ▶ "As a percentage of small business users, though, hosted IP telephony is likely to grow from about 3% to about 18% in 2015."

Source: Frost & Sullivan N765-64, June 2010, North American Hosted IP Telephony and UC Services Markets

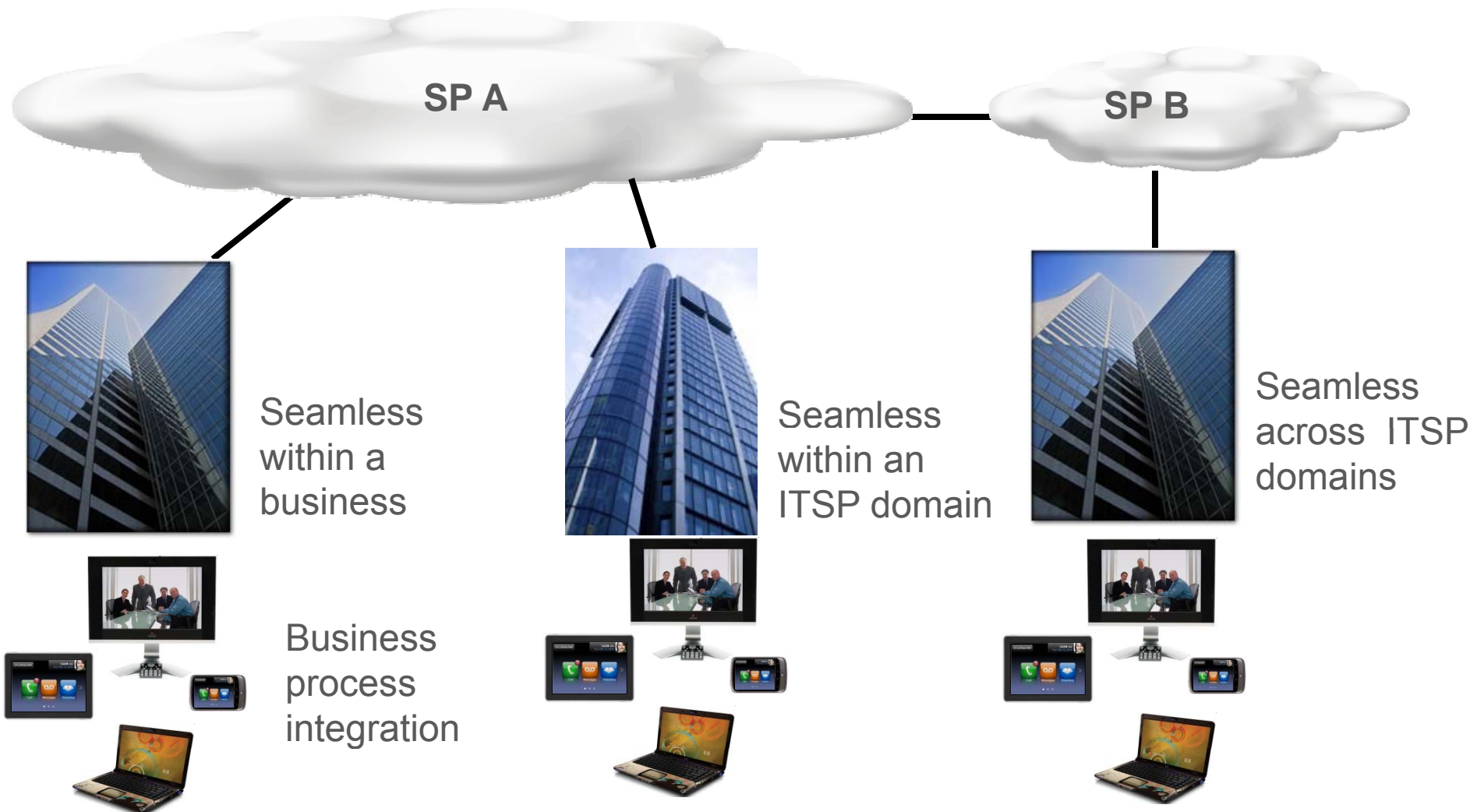


Cloud Services: What Makes Sense?

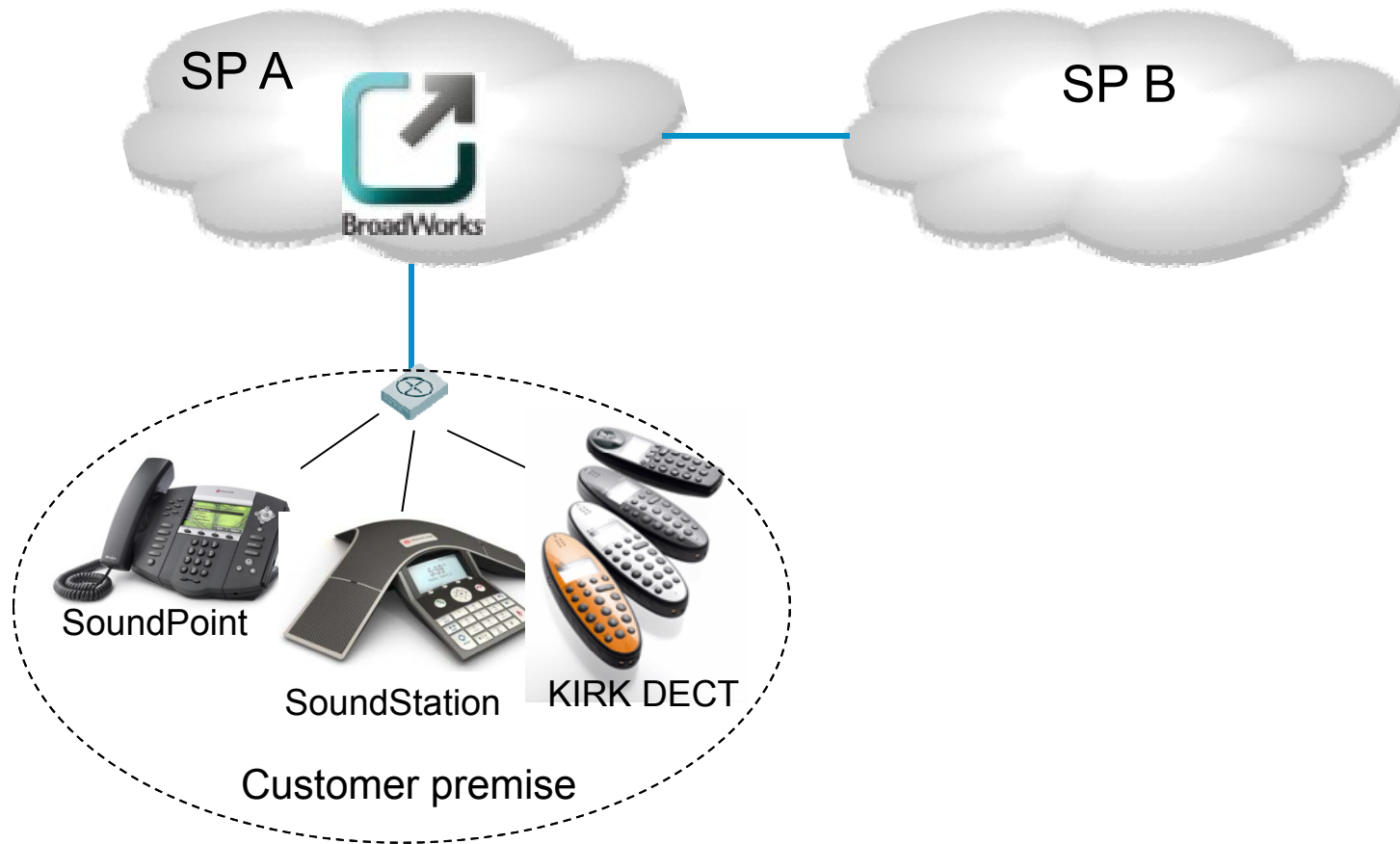


- ▶ Virtualization
- ▶ UC services
 - Email and collaboration tools
 - Directory services
 - IM and presence
 - Multipoint bridging (audio/video)
 - Recording and streaming
- ▶ IP network services
 - Authentication
 - Quality of service
 - Firewall traversal

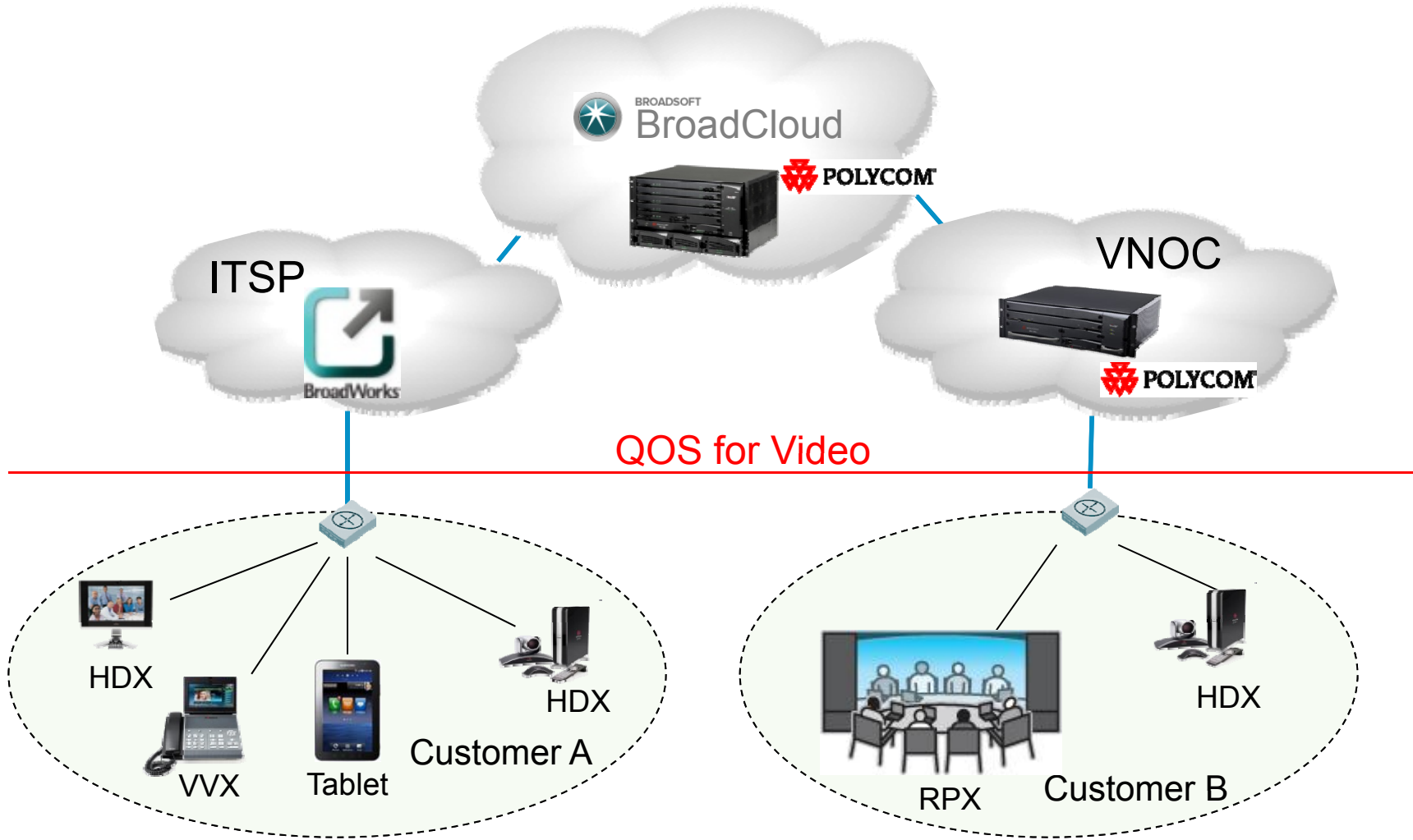
Opportunities for Hosted and White Labeled Services



ITSPs Offer Hosted Voice Communications Service Today (Polycom-BroadSoft Example)



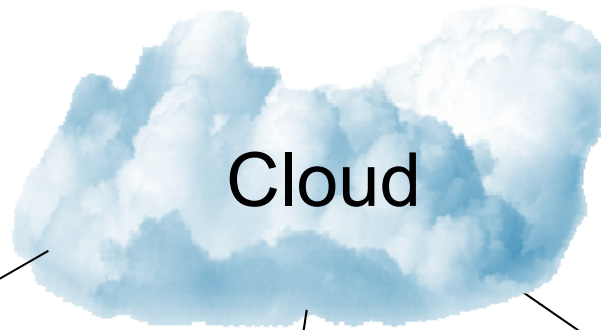
Business Models for Video



B2B Communications



Company A



Cloud SP functions:
Trusted third-party
Firewall traversal
Call control



Company B

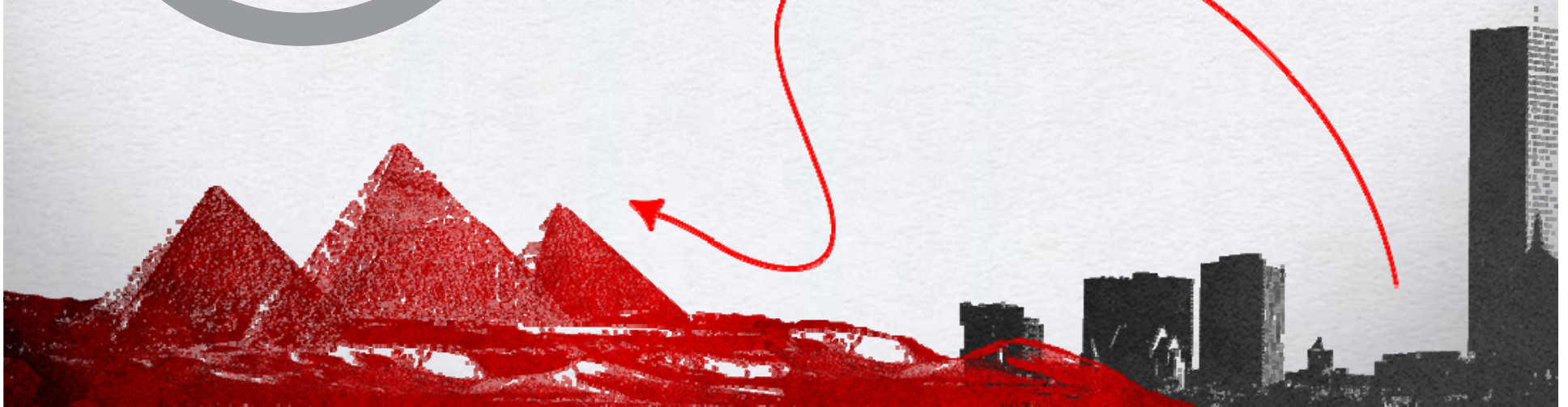


Company C

Summary

- ▶ Your services must evolve to meet increasing customer demands
 - Visual communications and collaboration
 - Business process integration (CEBP)
 - White label to fill in gaps in service offering
- ▶ UC and Video is an opportunity for you to increase your ARPU and add significant and differentiated customer value
- ▶ Polycom is investing very heavily in hosted UC solutions and devices while driving the industry toward ubiquitous UC and video across providers – we can help you evolve!

QUESTIONS



THANK YOU!



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the art of conversation