



Seamless Connectivity - It's What the Customer Wants and the Industry Needs

Mobile Voice Conference
April 22, 2010

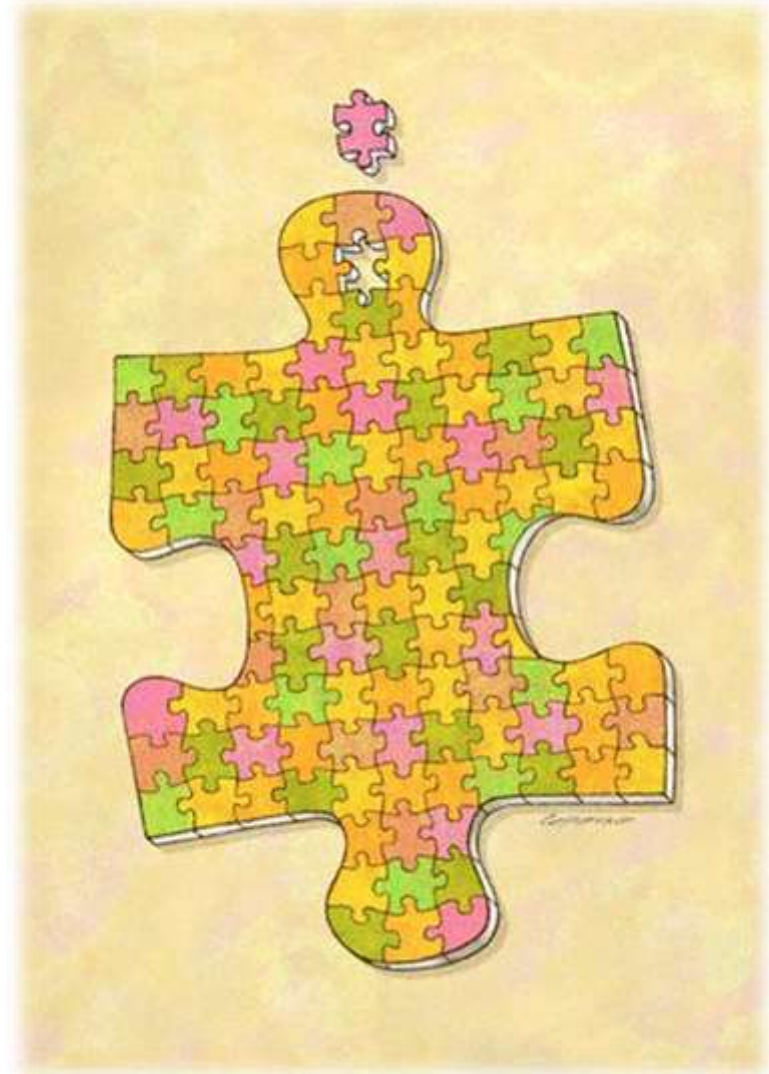
Presented by:
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Identifying the Markets for UC: It's all about the Number



	PBX/CPE Centric	Network Centric
Mobile number primary	<p>Dial mobile number</p> <p>When at desk / in office ring IP desk phone, softphone (others), plus Mobile</p>	<p>Dial mobile number</p> <p>When on broadband deliver call to an IP device and Mobile</p>
Fixed/VoIP number primary	<p>Dial wireline number (on IP PBX)</p> <p>When not at desk ring mobile phone</p>	<p>Dial wireline number (on softswitch / Centrex)</p> <p>When not at fixed location ring mobile phone</p>

- **Meeting End User's Persistent Feature Dilemma**
 - Meeting Demanding Users vs. Disruptive technology Curve (à la The Innovator's Dilemma)
 - Multi-faceted demands limit technology and product abilities to meet one solution fits all
- **Old Telco model is out-paced by newer Internet models**
 - NEPs are not meeting demands of the rapid pace of Internet-based applications and services and turning their customers into bit pipes
 - Traditional providers are fighting with sticks and arrows against new rapid Internet-based technologies
- **The Skype Threat**
 - **Fixed-Line Operators:** Skype now eats \$13B per year or 12% of International traffic
 - **Mobile Operators:** Skype is moving onto the handset
 - **Enterprise (PBX/Centrex):** Skype will move into the SME/Enterprise market



Mobile UC Client Market Figures: Enterprise Mobility



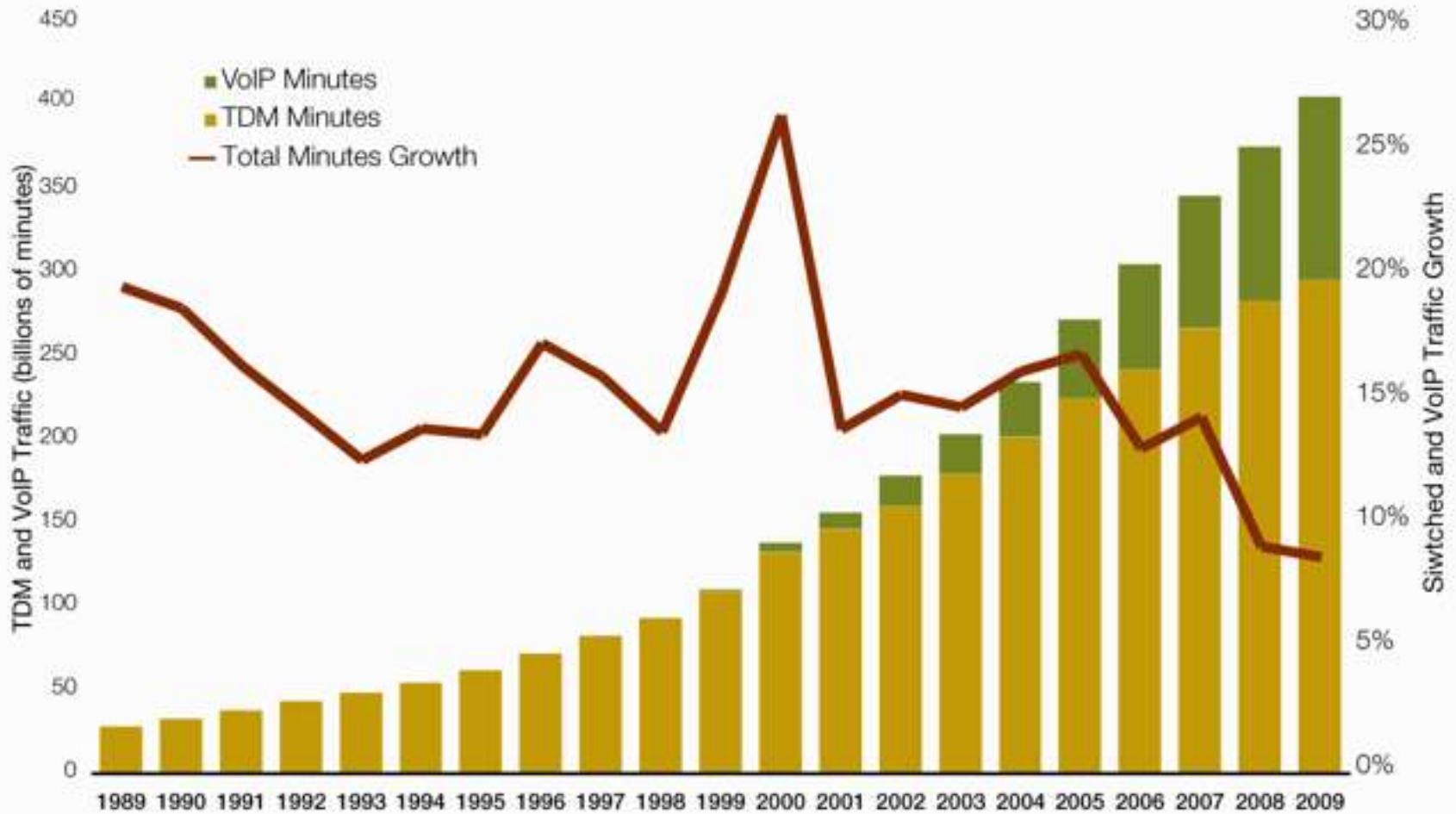
	2008	2009	2010	2011	2012	2013	2014	2015
Market Size (\$M)	118	190	306	492	793	1,276	2,055	3,309
Units (K)	465	803	1,385	2,391	4,127	7,123	12,294	21,220
ASP(\$)	254	237	221	206	192	179	167	156

Report Information/Highlights:

- CAGR 2008-2015 61.4% on revenue
- CAGR 2008-2015 72.6% on advanced Mobile UC Clients
- \$1 Billion Market within 4 years



International Call Volumes and Growth Rates, 1988-2009



Mobile and Carrier Drivers for FMC/UC

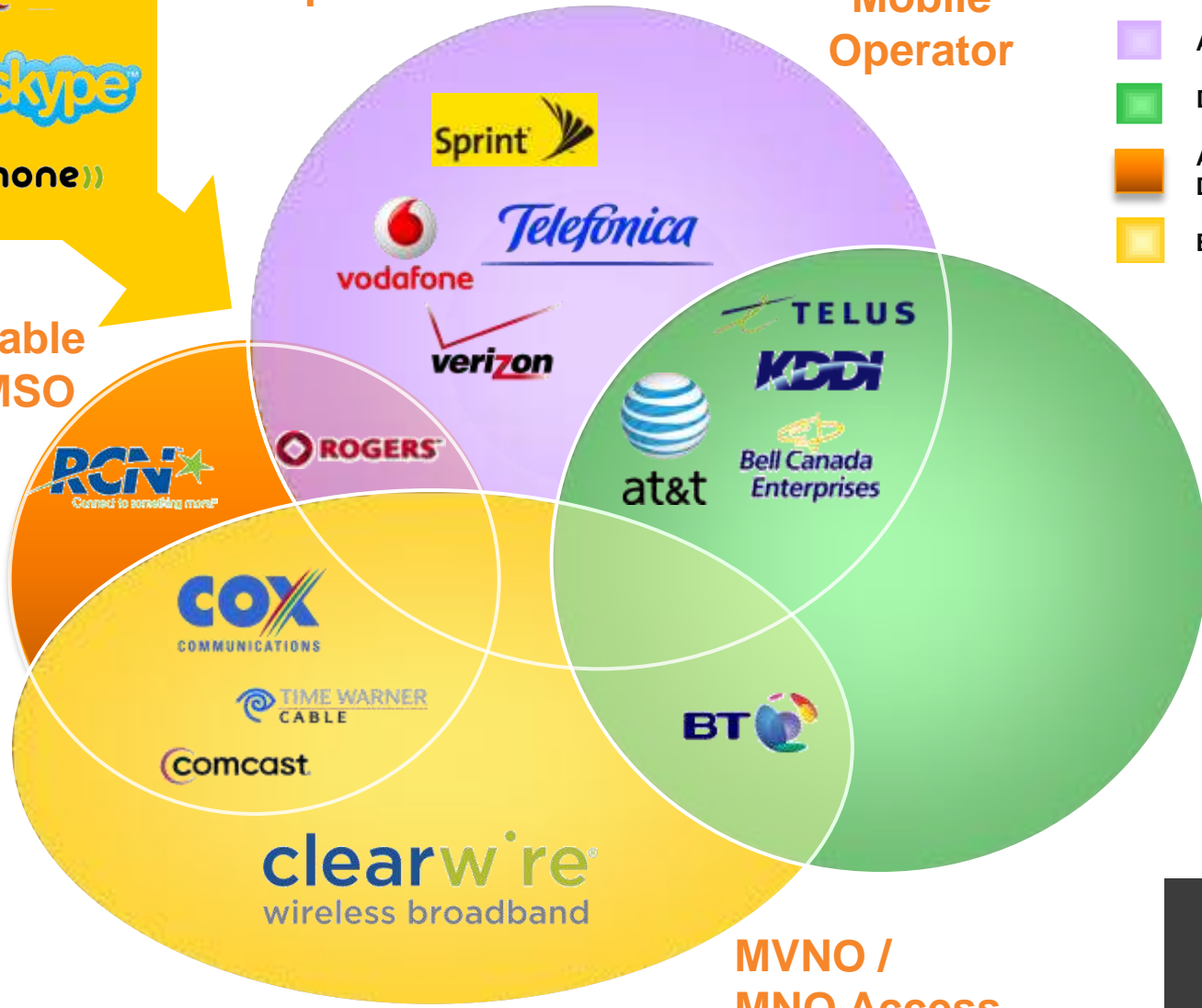
Google Voice
skype
((truphone))

Disruptors

Mobile Operator

- Attack the Wireline
- Defend the Wireline
- Attack the Wireline
Defend VoIP & Video
- Expand the Brand

Cable MSO



PSTN/
DSL

MVNO /
MNO Access

Carrier names are representative examples

FMC/UC Extremes: Not Tightly Coupled vs. Tightly Coupled

“Internet Invades Mobile”

vs “Mobile Invades Internet”



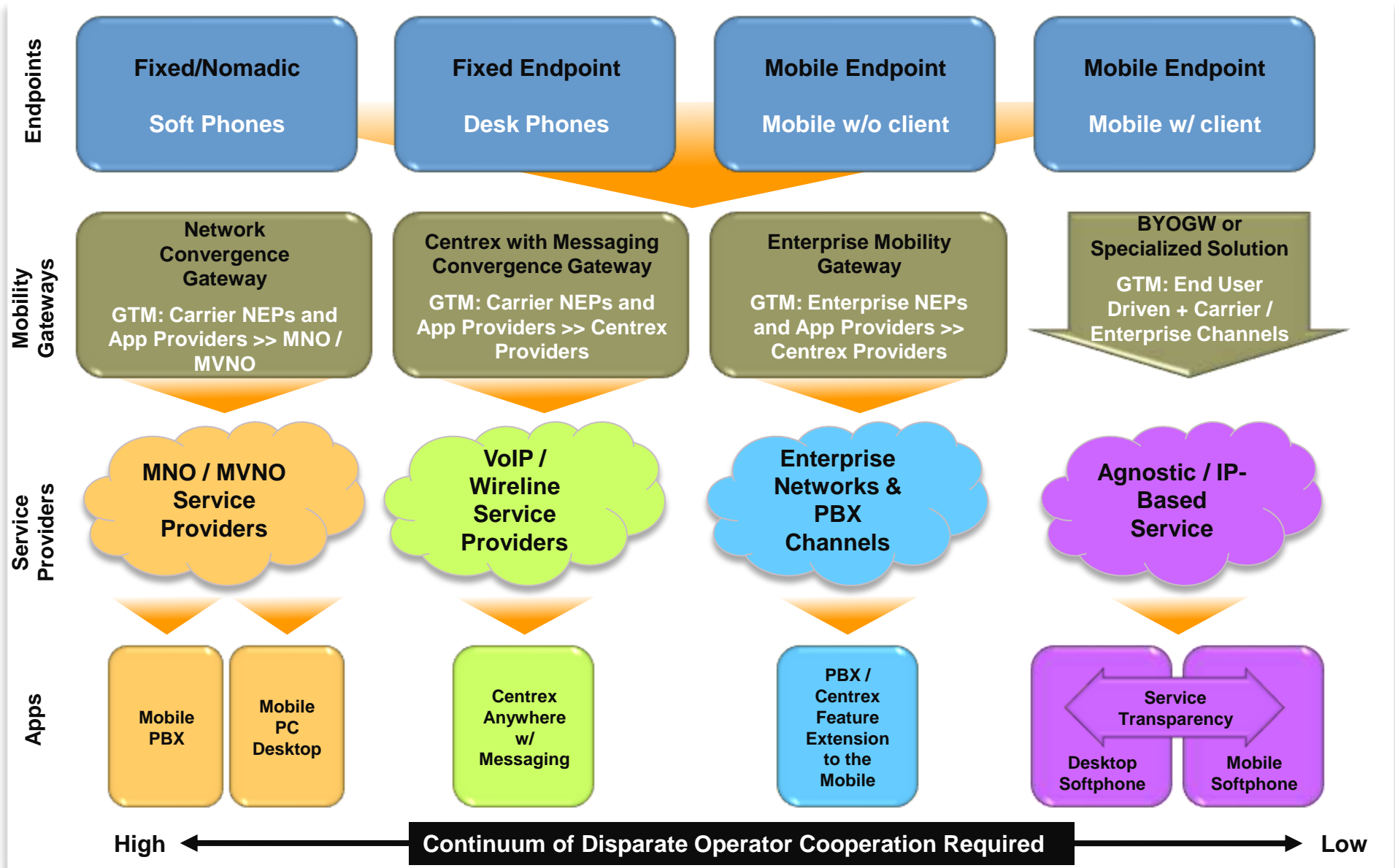
- Internet services (Skype, Yahoo!, Google, etc.)
- Internet (edge) charging model
- Mobile operator becomes a bit-pipe



- Mobile identity
- Mobile services
- Mobile (service) charging model
- Mobile provider monetizes the internet
- World's Largest Mobile roaming network



Products and Applications Driving UC





The screenshot displays the CounterPath UC Portal interface, which is a web-based application designed for user communication and content management. The interface is organized into several key sections:

- Header:** Features the CounterPath logo on the left and a navigation menu with "File", "History", "Actions", and "Help" on the right. A search bar is also present.
- Left Sidebar:** A "Friends" list showing contact status for Ted Williams, Daniela Alves, Arjun Bhabha (Idle), Margret Lee, Susan Mund (On the phone), Thomas Overton, and Jack Shephard.
- Chat Window:** A central chat area with a contact ID "1 604 555 55555" and a conversation history showing messages from "12505555555432" and "12505555555" regarding a building and GPS location. A response states, "I'll be there in an hour".
- Map:** A map of the United States with several user avatars overlaid, indicating their current geographic locations.
- Right Sidebar:** A list of social media and content sharing options, including Blogger, Facebook, LinkedIn, Myspace (login), Twitter, and Zoom.
- Content Area:** A grid of media content including:
 - A photo gallery of a family group.
 - A video player showing a PGA event featuring Phil Mickelson's Ryder Cup appearance.
 - A music player for "Lady In Autumn" by Billie Holiday.
 - A photo collage of various scenes.
- Bottom Navigation Bar:** A series of icons for navigation: my home, blog, my world, contacts, status, my networks, sms, chat, email, locator, my blog, calendar, download, live tv, and music.

CounterPath UC Portal: Video Example

A screenshot of the CounterPath UC Portal interface during a video conference. The interface is dark-themed and includes a top navigation bar with the CounterPath logo, "HD" indicator, a mute icon, a green "Call" button, and a search bar. The main area displays three video thumbnails: "Frank Cho" (an elderly couple), "John and Margaret Yates" (a family with a baby and a child), and "Stuart Yates" (a smiling couple). Below the thumbnails is a numeric keypad with letters assigned to numbers. At the bottom is a toolbar with icons for navigation and call controls.

CounterPath

HD

File | History | Actions | Help

Search

Frank Cho

John and Margaret Yates

Stuart Yates

1	2 ABC	3 DEF
4 GHI	5 JKL	6 MNO
7 PQRS	8 TUV	9 WXYZ
*	0 +	#

Bria | my world | contacts | status | keypad | video | mute | volume | add call | hold | hang up | transfer | chat | email | documents

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Thank you!