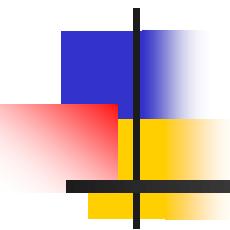




**The Radicati Group, Inc.**  
[www.radicati.com](http://www.radicati.com)



# **Instant Messaging Market: An Evolving Landscape**

A Radicati Group, Inc. Webconference

9:30 am, PT  
December 2, 2010



# Speakers & Agenda

## Speakers:

- Jan Joost Rueb, *CEO and Co-Founder, eBuddy*
- Eric Young, *Senior Director Global Field Services, FaceTime Communications*
- Dave Kong, *Product Manager, Microsoft*

## Agenda:

- *Presentations from eBuddy, FaceTime, and Microsoft*
- *Speaker Panel Discussion – moderated by Sara Radicati*
- *Audience Q & A session*

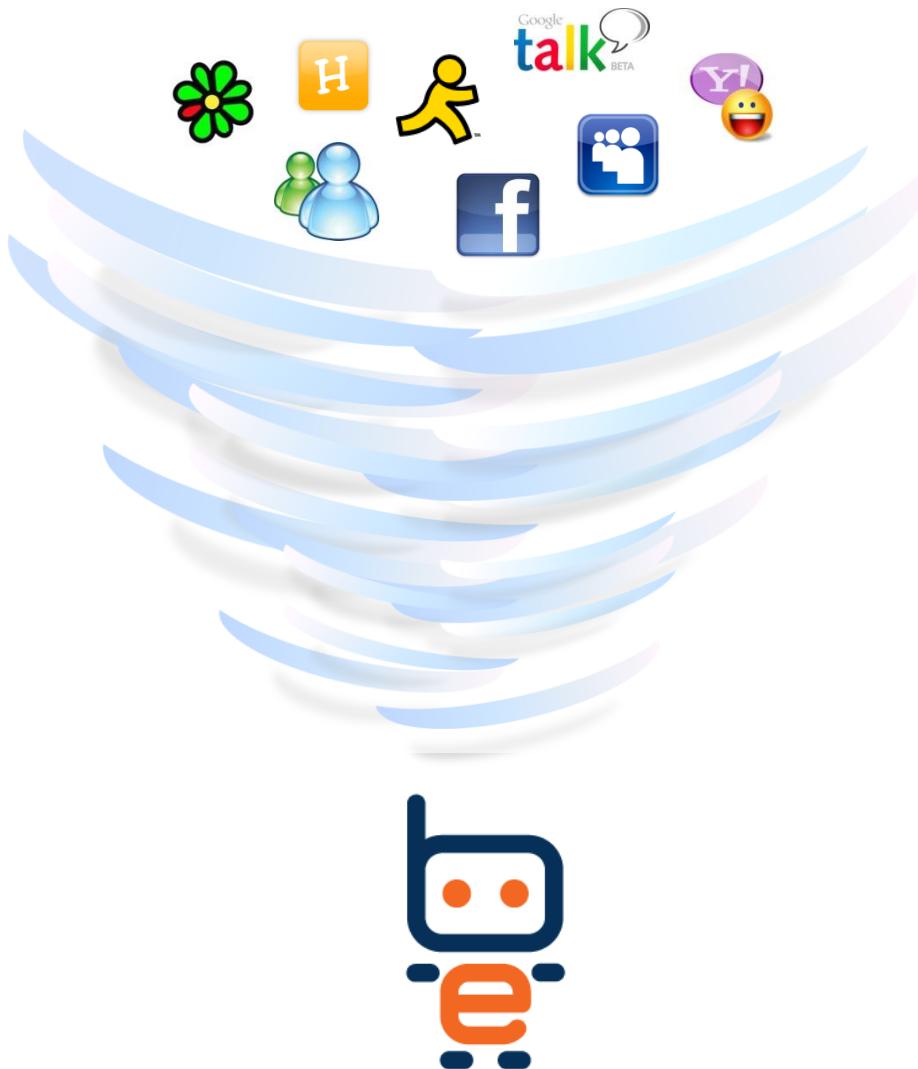


Radicati IM Webconference  
December 2010

- Confidential -

Copyright © eBuddy B.V. All rights reserved.

# eBuddy aggregates the most popular Instant Messaging (IM) networks into one product



## Core functionality:

- eBuddy offers users the possibility to aggregate their IM accounts and social networks into one IM service.
- It includes the following networks:
  - Windows Live Messenger (MSN)
  - Facebook
  - Yahoo! Messenger
  - Google Talk
  - AIM
  - ICQ
  - MySpace
  - Hyves

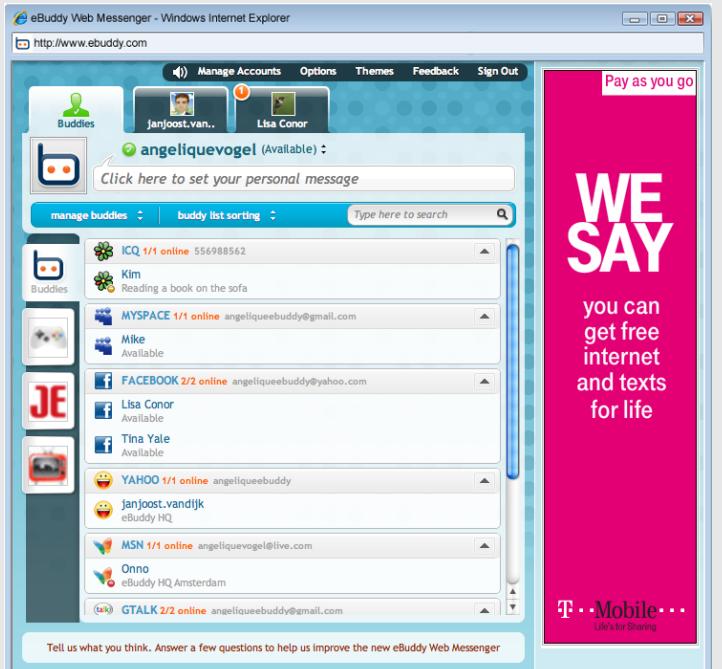
# eBuddy offers aggregated IM products for Web and most mobile devices



## Web

Via browser, no download or installation needed

>22M monthly visitors



## Mobile

90% of the world's mobile phones can use eBuddy

>17M monthly unique users



Mobile Messenger (APP)



iPhone (APP)



Android (APP)



Lite web messenger



Playstation portable web messenger

# eBuddy has proven to be one of the fastest growing consumer messaging companies



20 million active users/month

15 million active users/month

10 million active users/month

eMessenger founded by 3 partners:  
• Paulo Taylor  
• Jan-Joost Rueb  
• Onno Bakker

4M web users  
5 patents filed

€ 1.75M series A funding by Lowland Capital  
Rebranded to eBuddy  
Deals with top 20 media agencies

Introduction eBuddy mobile IM  
1M Mobile uniques  
The 7th fastest rising search term globally (Google Zeitgeist 2007)  
London Office

€ 4M series B funding by Prime Technology Ventures  
SFO Office  
45 billion messages processed in 2008  
Reached 10 million J2ME downloads

New revenue source from paid iPhone app  
Crunchies winner for Best International Company  
50 FTE  
#1 downloaded IM application in leading app stores like Getjar, Ovi and Apple App store  
Cash flow positive since Oct 09

189M+ users in database  
22M visitors (13M users) per month on web  
17M users per month on mobile  
230k new users per day  
100M downloads of the mobile client  
80 FTE  
16B messages processed per month  
Mashable Open Web Award winner for Best Mobile App

2004

2005

2006

2007

2008

2009

2010

eBuddy has a brand known by millions of people around the world



### Most popular Facebook product pages

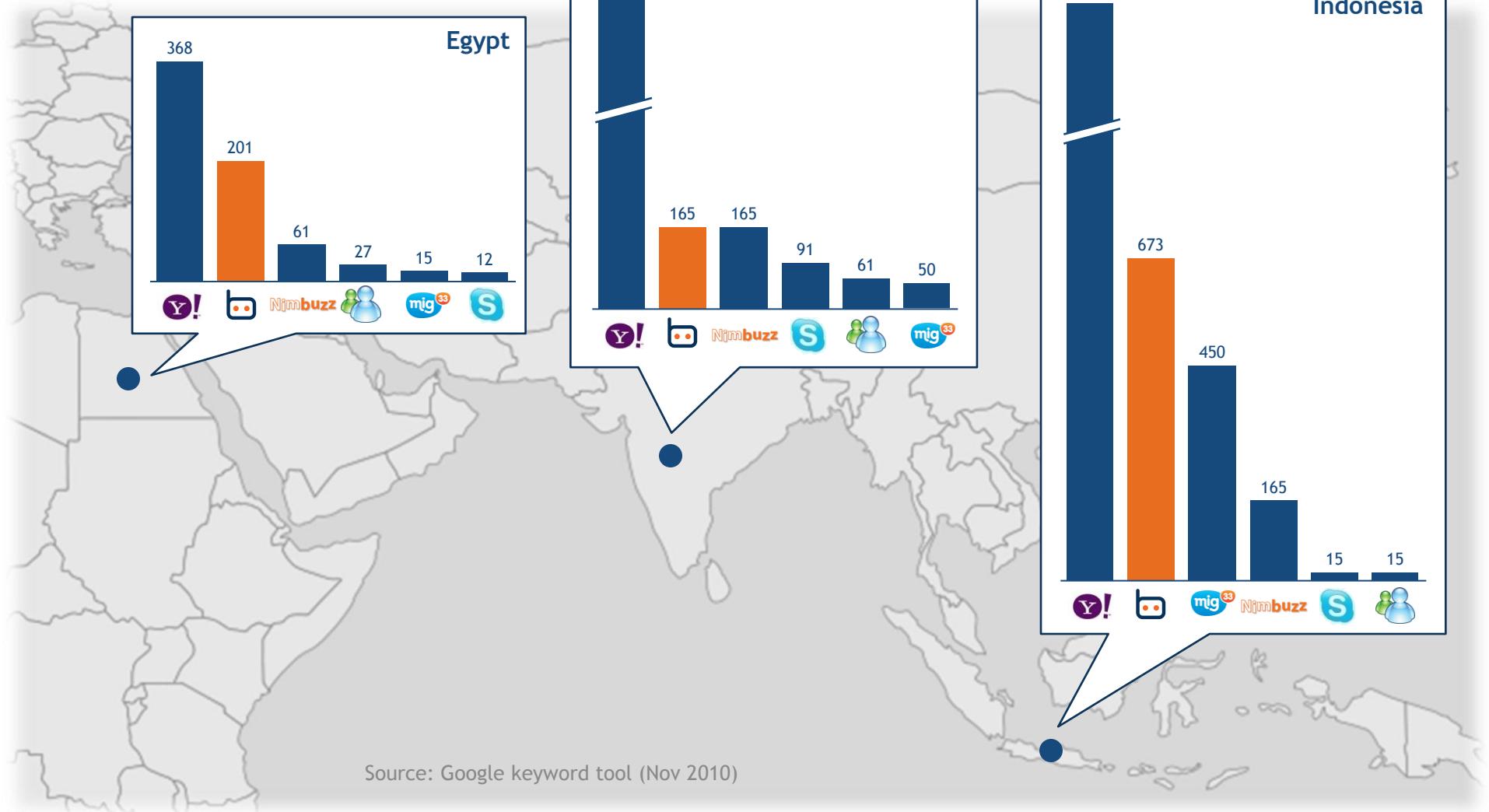
Rank	Name	Facebook fans
1	Coca-Cola	18,177,209
2	Oreo	14,116,113
3	Skittles	13,074,479
	⋮	⋮
36	Sprite	1,293,382
37	Adobe Photoshop	1,292,173
38	Doritos	1,215,181
39	Sour Patch Watermelon	1,156,136
40	Barbie	1,099,034
41	Old Spice	1,078,218
42	eBuddy	1,012,431
43	Six flags	900,991
44	ICEE	879,219
45	Butterfinger	662,997

### Popular internet brands (Google searches)

Name	Google searches / month
Twitter	41,290,000
Amazon	39,030,000
Apple	31,400,000
HTC	21,900,000
eBuddy	21,600,000
AOL	21,400,000
Skype	17,820,000
QQ	17,690,000
CNN	11,773,000
MTV	9,590,000
Dailymotion	8,830,000
Pandora	6,488,000
Meebo	6,285,000
Foursquare	408,500

# Emerging markets are quickly becoming our most important mobile markets

Mobile Google searches for IM keywords (x1000, per month)



# eBuddy Mobile has been downloaded more than 100M times



eBuddy is the  
most downloaded  
IM application



eBuddy is the highest ranked  
independent IM app in 42 out  
of 69 countries



eBuddy has been  
downloaded 9.6M times  
in the iTunes Store

eBuddy is the most  
popular aggregated  
IM application

eBuddy is the most  
popular aggregated IM  
app in all 77 countries  
in the Android market



Enabling the New Internet

**ERIC YOUNG**

Senior Director of Global Field Services

# About FaceTime Communications

## ■ Secure and Enable the New Internet

- 4,000+ Web 2.0 apps, Unified Communications, Social Networks
- IM (Yahoo!, AOL, Gmail, Skype...)



## ■ Global operations

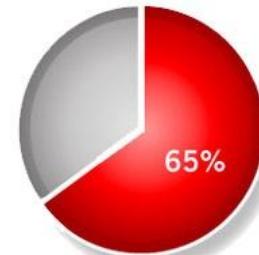
- USA, EMEA, India, Asia/Pacific

## ■ Market Leader

- 9 of the top 10 US banks
- Insurance, Energy, Healthcare, Consumer Products, Government...

## ■ Broadest Partner Ecosystem

- Technology alliances



North American Financial Services Market



# The Internet Has Changed

Adoption in the Enterprise



Source: FaceTime Annual Collaborative Internet Surveys 2007 – 2010 & Projected

# Enterprise 2.0 and Web 2.0 are Converging



Source: FaceTime Annual Collaborative Internet Surveys 2007 – 2010 & Projected

# Presenting Significant Risks When Unmanaged

## Data Leakage



Personal Information  
Intellectual Property  
Credit Card, SSN  
Patient Records

## Incoming Threats



Malware, Spyware  
Viruses, Trojans  
Inappropriate Content

## Compliance & eDiscovery



SEC, FINRA, NFA  
HIPAA, FISMA, SOX  
PCI, FOI, DOD, FSA  
FRCP- eDiscovery  
FERC, NERC

## User Behavior



Employee Productivity  
Bandwidth Explosion  
Every employee is the face of the business

# FaceTime Mission

FaceTime helps businesses realize the benefits of the 'New Internet' by delivering enterprise solutions that provide **unified security, management and compliance** across the broadest set of applications and modalities.



## *Visibility*

- Internet & Web 2.0 application usage
- Social Network feature and content posted
- Multi-modal highly visual reporting



## *Security*

- Prevent viruses, malware, spIM
- Protect IP, prevent data leakage
- Block unsanctioned applications



## *Management*

- Granular policies for sanctioned applications
- User/Group, Time of Day, Time Quota
- Content filtering, ethical walls, disclaimers

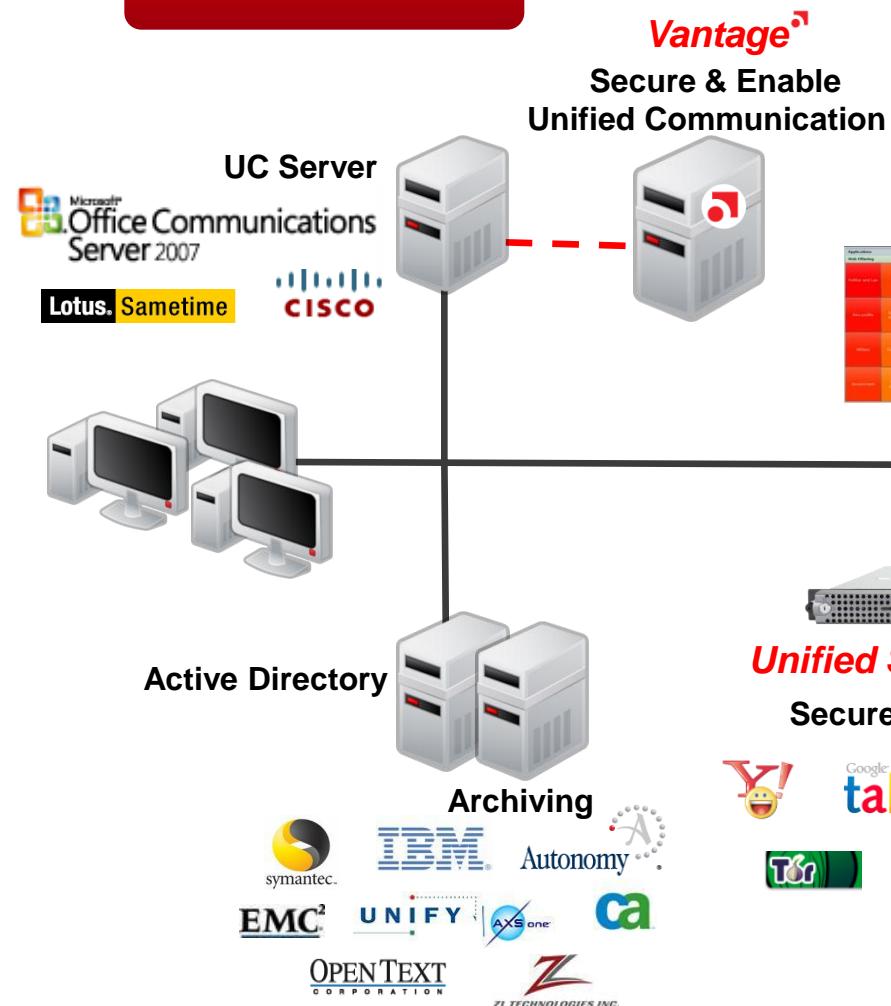


## *Compliance*

- Logging, archiving, auditing of all user communications
- Full compliance review and workflow
- Leverage existing email archive and ECM platforms

# FaceTime Solutions

LAN/WAN



Internet

**Socialite**  
Secure & Enable Social Networks



Microsoft Office Communications Server 2007

Lotus Sametime

CISCO

REUTERS Bloomberg

YellowJacket

# Delivery Models

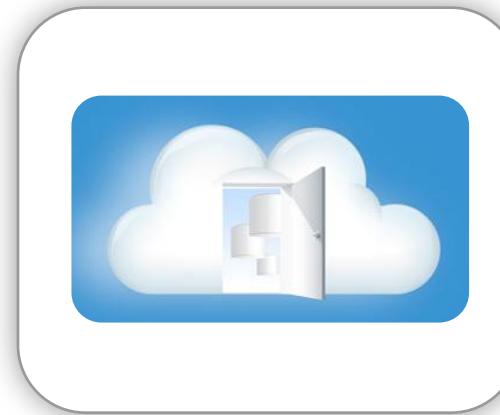
Server or Virtualized Server



Appliance



Cloud



Hybrid



# Enabling Social Networking

Issue	Control Requirements
Data Leak Prevention/Content Protection	Protect organization from employees disclosing sensitive information
Malware Protection	Protect network against hidden Phishing/Trojan attacks through applications
Identity Management	Ensure that SarahFaceTime on Twitter, Sarah Louise Carter on LinkedIn & sl_carter on Skype connect back to her corporate identity
Activity Control	Post content, status updates, allowed for marketing. Read only access for all other staff.
Moderator Control	John's posts appear on Twitter or Facebook only upon approval by Compliance Officer
Granular Application Control	John can access Facebook, but not use Facebook chat, or download and install any applications in the gaming category.
Log and Archive Activity & Content	Log all content posted, message sent through Web 2.0 and social networks
Use Archive of Choice	Export stored data with corporate identity credentials to email archive, WORM, for single discovery location



# Enabling Unified Communications



Lotus Sametime



BlackBerry

- **Single solution to manage all real-time messaging**
  - Support for the broadest set of Platforms
  - Public IM networks, Unified Communications (UC) platforms, Skype, BlackBerry.
- **User identification and management**
  - AD integration
  - Auto-mapping of multiple identities to single corporate user identity
- **Powerful, granular policies**
  - Define policies at the company, group or user level
  - Apply consistent policy to UC, file transfer, voice, video and web conferencing
  - Enable ethical boundaries
  - Deploy in-line disclaimers to inform users of policy
- **Real time content monitoring**
  - Scan and block file transfers, keywords/phrases and regular expressions over IM and UC to keep confidential information from leaving the company

- **Corporate, e-Discovery and regulatory compliance (TrueCompliance™)**
  - Log conversations to meet regulatory requirements (FINRA, SEC, FERC/NERC, FOI, HIPAA, FISMA, FRCP...)
  - 360 degree auditing of all events and administrator actions
  - Guaranteed tamper-proof archiving and message order preservation
  - Easy retrieval for e-Discovery and litigation requirements
  - Policy-based export to popular archiving platforms



- **Day Zero malware protection**
  - Anti-virus, anti-worm, anti-malware and anti-SpIM features ensure connections to public IM networks and federated UC communications are secured

# Microsoft Lync Server 2010

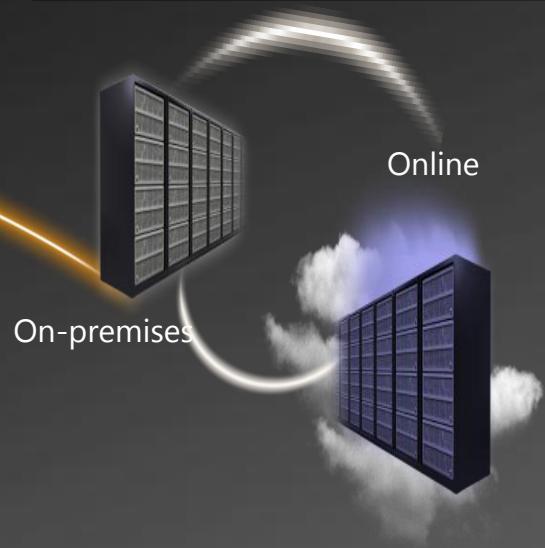
Dave Kong, Product Manager

# Microsoft Business Productivity Infrastructure

Best Productivity Experience  
Across PC, Phone, and Browser



The Cloud On Your Terms



Unified  
Communications

Business  
Intelligence

Enterprise  
Content  
Management

Collaboration

Enterprise  
Search

Unified Business Platform

# Microsoft Lync Server 2010

Connecting People In New Ways, Anytime, Anywhere



*Drives adoption through ease of use and integration with Microsoft Office*

*Reduces cost through a complete converged communications solution*

*Eases deployment and migration through interoperability and extensibility*



Instant  
Messaging  
and Presence



Audio, Video,  
and Web  
Conferencing



Enterprise  
Voice and  
Telephony

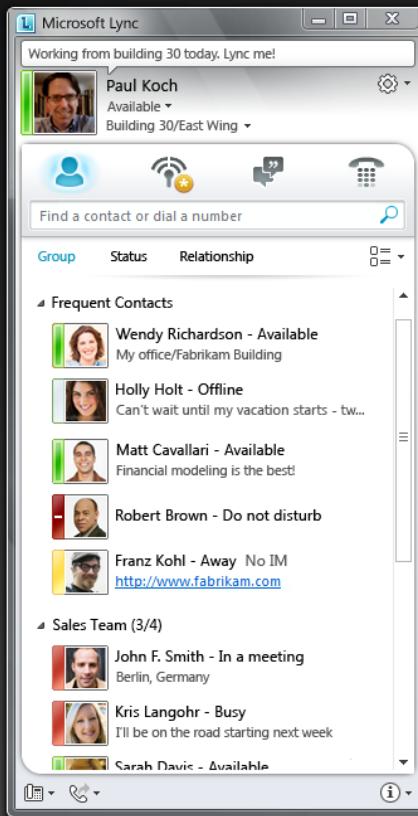
# Lync IM & Presence

Help users connect using the right tools at the right time

**Find &  
Communicate with  
the right People**

**Build Social  
Connections**

**Manage your  
Communications**



Across Devices



PC, Phone, Web

Managed

Built-in Security

Archived

# Top IM & Presence Features

Driving adoption with ease of use and integration in Microsoft Office

## Skill Search

Find the right person anytime, anywhere based on keywords describing a colleague's expertise.

## IM/P from Office

View rich Presence, hover over contact cards, and instant message contacts directly within familiar Office applications such as Outlook, Word, and Excel.

## Lync 2010 Group Chat

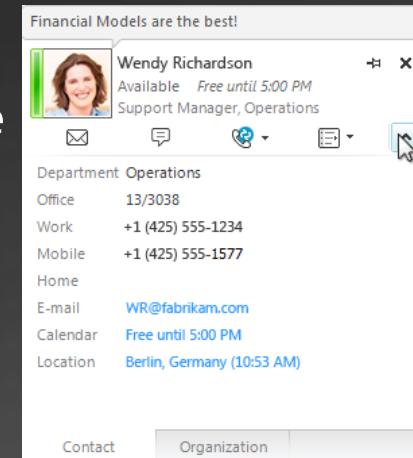
Allows users to have topic-based, multi-party discussions that persist over time, allowing efficient information sharing and discussions as a group.

## Multiparty IM and File Transfer

Instant message and transfer files to multiple contacts. Drag and drop more contacts into the conversation directly from your contact list.

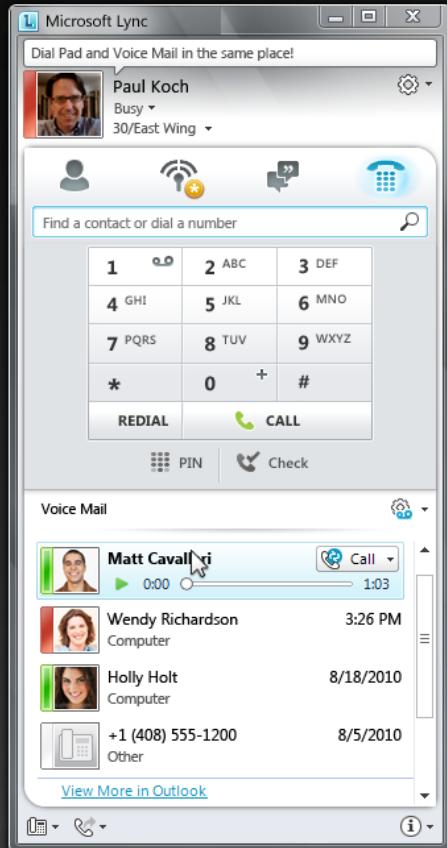
## Federation & Public IM Connectivity

Connect with customers and partners through Lync federation capabilities. Also communicate with external contacts on public IM networks such as Windows Live, Yahoo!, AOL. Lync supports audio and video chat with Windows Live users.



# Learn more about Lync!

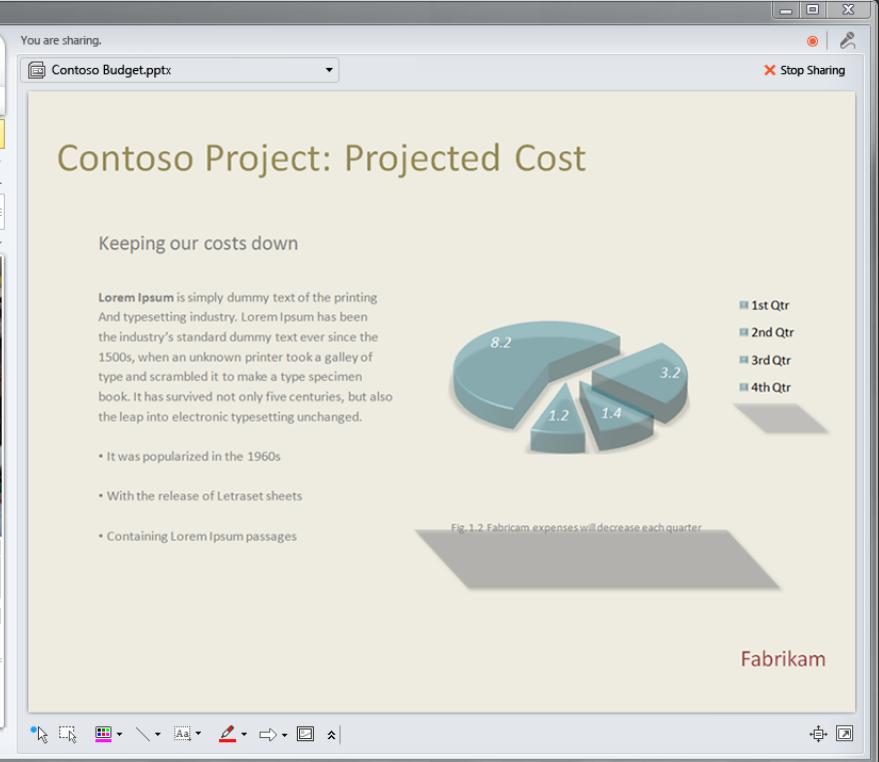
<http://www.lync.com>



Voice Options



Conferencing with PowerPoint upload





The Radicati Group, Inc.  
[www.radicati.com](http://www.radicati.com)

# Thank You!

New Reports just published by The Radicati Group:

- **eDiscovery Market, 2010-2014**
- **Email Platforms for Service Providers, 2010-2014**
- **Instant Messaging Market, 2010-2014**
- **Wireless Email Market, 2010-2014**

You can view all our published and upcoming reports at [www.radicati.com](http://www.radicati.com)