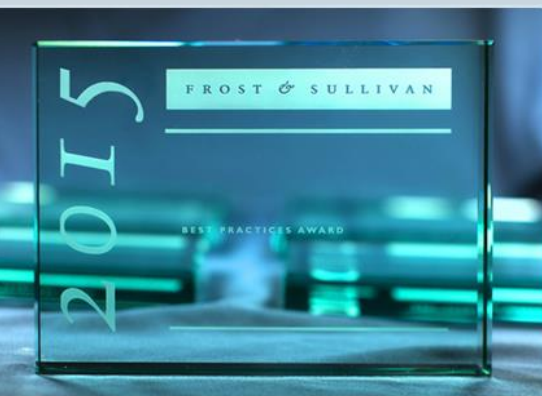


mediaplatform

2015 Global Enterprise Video Platforms Product Leadership Award



F R O S T & S U L L I V A N



50 Years of Growth, Innovation & Leadership

Contents

<i>Industry Challenges</i>	3
<i>Product Family Attributes and Business Impact</i>	4
<i>Conclusion</i>	6
Significance of Product Leadership	8
<i>Key Benchmarking Criteria</i>	9
Best Practice Award Analysis for MediaPlatform	9
<i>Decision Support Scorecard</i>	9
<i>Product Family Attributes</i>	10
<i>Business Impact</i>	10
<i>Decision Support Matrix</i>	11
<i>Research Methodology</i>	12
About Frost & Sullivan	12

Background and Company Performance

Industry Challenges

Enterprises around the world are struggling to stay ahead of shorter business cycles, intensifying competitive pressures and regulatory hurdles. Against this backdrop, the value proposition of enterprise video platforms (EVP) is undeniable. EVPs enable companies to deliver important and time-sensitive content, in the form of live and on-demand video. EVPs are driving employee alignment and corporate communications initiatives through CXO broadcasts and departmental meetings, thus, creating an engaged workforce. They are facilitating onboarding, new hire orientations and corporate learning initiatives helping companies create a better trained workforce while tackling the problem of attrition. EVPs are also employed in sales force enablement, emergency broadcasts, outbound communications, such as marketing and investor presentations, and a plethora of other use-cases.

2014 was a good year for the enterprise video platforms market. Market education efforts by the industry, consultants and analysts seem to be bearing fruit. This combined with the growing number of successful deployments and customer testimonials has resulted in an increased awareness in several global enterprises about the value proposition of EVPs, thus propelling solution uptake across all verticals.

However, over the past 2-3 years, as the enterprise market opportunity has become increasingly evident, a proliferation of new entrants from complementary spaces has ensued. Unified communications vendors like Cisco, Polycom, BlueJeans and GoToMeeting are players in this market, as are virtual events companies like ON24, INXPO and Brighttalk. Online video platforms such as Brightcove, Ooyala and Kaltura cater to the enterprise video market, and so do companies like Sonic Foundry and Panopto that have a stronghold in the education sector, both seeing significant traction from their enterprise businesses as well.

This market fragmentation has multiple important side effects. On one hand, for customers of enterprise video platforms, recognizing the competitive differentiation in this dynamic and crowded landscape is increasingly challenging. This fragmentation also escalates pricing pressures.

Consumers, on the other hand, are spoilt for choice. There are vendors in this market, providing end-to-end platforms, best-of-breed point solutions and everything in between. For business and IT buyers at the enterprise, analyzing the various offerings in this market, comparing product features and pricing, while understanding how technologies, like adaptive bit rate and multi cast, are relevant to their enterprise's particular network and security requirements, can be overwhelming and challenging.

Video has become just another data type for the consumer. Although enterprises are inherently slower than the consumer landscape in terms of technology adoption,

employees have come to expect and demand live and on-demand video at their workplaces. Therefore, a ripple challenge is that innovating and enhancing product lines to satisfy the enterprise consumers' expectations for newer features (like mobile and social) while continuing to deliver high quality, scalable, secure, and reliable video, is difficult to achieve for vendors in the EVP market.

Growth is not a given in the EVP space simply because of the heightened competitive pressures, the scale challenge and low margins. Vendors with a truly great product, that can address all the above challenges, stand to gain in the market in the years to come.

Product Family Attributes and Business Impact

Match to Needs

MediaPlatform is an enterprise video platform provider whose solution is employed by some of the world's largest companies and brands. MediaPlatform is based in Los Angeles and was founded in 2005.

The enterprise video platform space has become increasingly crowded and dynamic in the recent past. Differentiation is challenging to both achieve and articulate. Given this backdrop, the companies that truly stand out have a stable and strong product that is consistently deployed successfully and delights customers. Frost & Sullivan believes that MediaPlatform leads the pack with an impressive and comprehensive product line that focuses on the seamless ingest, management and delivery of secure, scalable and high quality live and on-demand video at enterprises of all sizes.

MediaPlatform's core products are [WebCaster](#) and [PrimeTime](#). WebCaster is an enterprise video webcasting platform that enables organizations to easily produce and distribute interactive and engaging live webcast experiences. PrimeTime is the enterprise video portal that functions as a corporate YouTube, and is home of all on-demand content and archived webcasts. Together, WebCaster and PrimeTime, power CEO broadcasts, employee town halls, corporate learning initiatives, field sales training, marketing webcasts, as well as partner and investor communications, enabling enterprises to drive down costs, enhance productivity and decrease time-to-market.

Reliability and Quality

Delivering live communications across the internal networks at global organizations is a challenging task. Frost & Sullivan's research shows that few enterprise video solutions get this right - and [SmartPath](#) is MediaPlatform's answer to the delivery challenge at enterprises and as such is the company's biggest differentiator.

With SmartPath, MediaPlatform offers enterprises the unique ability to webcast to virtually any end user, regardless of location or content distribution technology. SmartPath enables a pervasive streaming of presentations across virtually any type of delivery scenario, by providing a framework to define the particular set of media distribution and failover rules

that make sense for an organization.

For companies that do not have complete WAN acceleration deployments and are shying away from multicast, MediaPlatform offers a proprietary enterprise CDN. MediaPlatform [SmartEdge](#) is a viable, user-friendly, cost-effective and easy-to-deploy alternative. SmartEdge is a software-based solution that is integrated with MediaPlatform PrimeTime and is focused on the acceleration and optimization of live and on-demand HTTPS video delivery across corporate networks. SmartEdge can perform video pre-positioning, intelligent video caching, byte range caching and supports adaptive bitrate streaming. SmartEdge can be administered from PrimeTime and enables non-technical employees to bypass the complexity of solutions like Riverbed.

Another key area of focus for MediaPlatform is the improvement of quality of experience analytics for live webcasts. MediaPlatform Centralized Data Collection (CDC) provides real-time feedback regarding quality of viewer experience, and can be used as a troubleshooting tool. This analytics dashboard provides insight for webcast producers to proactively understand where problems are occurring during a broadcast, enabling them to make the necessary adjustments and ensure the viewing experience is not negatively impacted. Customers can also use cross-project views that provide thorough analytics of more than one webcast, enabling comparison between events.

The key pain point for vendors and customers in this market is navigating diverse enterprise networks to deliver a high quality video experience - MediaPlatform developed a laser-like focus on this critical aspect in the early stages of developing their product. MediaPlatform's understanding of video distribution and experience solving the many related challenges global enterprises encounter, enables the company to remain a leader in the enterprise video industry.

Positioning

With the rise in interest and usage of videoconferencing technology inside the enterprise, MediaPlatform has recently introduced a SIP videoconferencing gateway called SmartBridge. SmartBridge gives enterprises the ability to webcast sessions to audiences of unlimited size.

SmartBridge gives enterprises a tool for leveraging their existing video conferencing units as a convenient video source for webcasts and connecting SmartBridge to an MCU allows organizations to take advantage of the features, functionality, and pre-existing deployment of their video conferencing system for webcasting purposes.

MediaPlatform also integrates with a slew of popularly used enterprise technologies in order to extend the reach of its solution. On the video conferencing front, MediaPlatform's integration with Cisco's WebEx enables ingest of WebEx files and Network-Based Recordings (NBR). MediaPlatform provides organizations with a searchable online repository for managing, publishing and distributing WebEx web conferences, online

meetings and video conference recordings using the PrimeTime enterprise video portal. The solution also integrates with learning management solutions like Cornerstone OnDemand, SuccessFactors, Sumtotal, Peoplefluent and IBM, and lecture capture solutions from Cisco, Polycom and Winnov, making it a great partner for corporate learning and development teams. MediaPlatform also integrates with enterprise social media platforms Jive and Yammer, and marketing automation solutions like Eloqua.

To enhance search and discovery, MediaPlatform enables speech to text for all video content, and system-wide transcript searching which allows viewers to jump to specific points in a video or on-demand webcast. MediaPlatform has also added options to hide transcripts, while still keeping them searchable, and suggest related videos.

The platform now allows users outside the company's firewall like partners and suppliers to log in to view content if permissions are granted. Frost & Sullivan finds that customers now derive greater value because the same platform can be used for three user categories when user registration is enabled - employees, partners and public.

MediaPlatform's focus on truly making video a staple content type at the enterprise is commendable. As a testament to its success, one of the world's largest multinational management consulting firms, and one of the MediaPlatform's longest-tenured customers, recently reclassified MediaPlatform internally to an "always ON" application, putting it in the same group as email, Lync and basic internet access.

Customer Acquisition

Frost & Sullivan notes that MediaPlatform's solution is vertical agnostic and is used by the largest, most global organizations. Technology and business services firms like Ericsson, Facebook, UL, Adobe and EY are key customers. Oil and gas giants like Phillips 66 and Royal Dutch Shell, and pharma and healthcare companies like Sanofi and Abbott Laboratories, agencies like Ogilvy and Mather, brands like Coca-Cola, Lululemon, Mattress Firm, etc. are MediaPlatform customers today.

Growth Potential

In August 2015, MediaPlatform received \$12 million in funding from TVC Capital, a San Diego, CA-based growth equity firm. Developing a sound product has been MediaPlatform's top priority so far, with less focus on sales and marketing than some of the other vendors in the space. The company has allowed their illustrious customer roster to speak for itself. This new injection of cash will allow the company to invest in sales and marketing efforts, raising awareness of its brand among prospective customers.

Conclusion

Frost & Sullivan is bullish about MediaPlatform's growth potential in the next 3-5 years. Frost & Sullivan's independent analysis of the Enterprise Video Platforms market clearly shows that the company's ability to provide a comprehensive platform for enterprises to

power live and on-demand video for internal as well as external use-cases, the strength of its video distribution capabilities, the intuitive and user-friendly nature of its solution, the integration with complementary enterprise technologies that help extend the use of video at the world's top companies makes MediaPlatform's product be a leader in the enterprise video platform market in 2015.

Because of its strong overall performance, MediaPlatform has earned Frost & Sullivan's 2015 Global Product Leadership Award.

Significance of Product Leadership

Ultimately, growth in any organization depends upon customers purchasing from your company, and then making the decision to return time and again. A comprehensive product line, filled with high-quality, value-driven options, is the key to building an engaged customer base. To achieve and maintain product excellence, an organization must strive to be best-in-class in three key areas: understanding demand, nurturing the brand, and differentiating from the competition.



Understanding Product Leadership

Demand forecasting, branding, and differentiation all play a critical role in finding growth opportunities for your product line. This three-fold focus, however, must be complemented by an equally rigorous focus on pursuing those opportunities to a best-in-class standard. Customer communications, customer feedback, pricing, and competitor actions must all be managed and monitored for ongoing success. If an organization can successfully parlay product excellence into positive business impact, increased market share will inevitably follow over time.

Key Benchmarking Criteria

For the Product Leadership Award, Frost & Sullivan analysts independently evaluated two key factors—Product Family Attributes and Business Impact—according to the criteria identified below.

Product Family Attributes

- Criterion 1: Match to Needs
- Criterion 2: Reliability and Quality
- Criterion 3: Product/Service Value
- Criterion 4: Positioning
- Criterion 5: Design

Business Impact

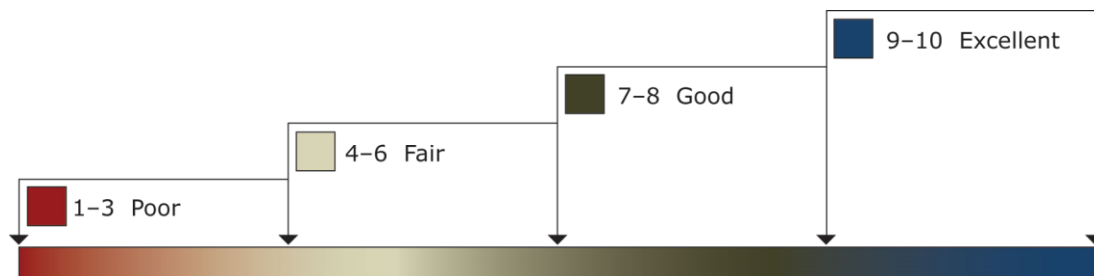
- Criterion 1: Financial Performance
- Criterion 2: Customer Acquisition
- Criterion 3: Operational Efficiency
- Criterion 4: Growth Potential
- Criterion 5: Human Capital

Best Practice Award Analysis for MediaPlatform

Decision Support Scorecard

To support its evaluation of best practices across multiple business performance categories, Frost & Sullivan employs a customized Decision Support Scorecard. This tool allows our research and consulting teams to objectively analyze performance, according to the key benchmarking criteria listed in the previous section, and to assign ratings on that basis. The tool follows a 10-point scale that allows for nuances in performance evaluation; ratings guidelines are illustrated below.

RATINGS GUIDELINES



The Decision Support Scorecard is organized by Product Family Attributes and Business Impact (i.e., the overarching categories for all 10 benchmarking criteria; the definitions for each criteria are provided beneath the scorecard). The research team confirms the veracity of this weighted scorecard through sensitivity analysis, which confirms that small changes to the ratings for a specific criterion do not lead to a significant change in the overall relative rankings of the companies.

The results of this analysis are shown below. To remain unbiased and to protect the interests of all organizations reviewed, Frost & Sullivan chooses to refer to the other key players as Competitor 2 and Competitor 3.

DECISION SUPPORT SCORECARD FOR PRODUCT LEADERSHIP AWARD

<i>Measurement of 1–10 (1 = poor; 10 = excellent)</i>			
Product Leadership	Product Family Attributes	Business Impact	Average Rating
MediaPlatform	9.5	9.0	9.25
Competitor 2	8.0	8.0	8.00
Competitor 3	7.5	6.5	7.00

Product Family Attributes

Criterion 1: Match to Needs

Requirement: Customer needs directly influence and inspire the design and positioning of the product family

Criterion 2: Reliability and Quality

Requirement: Products consistently meet or exceed customer expectations for performance and length of service

Criterion 3: Product/Service Value

Requirement: Products or services offer the best value for the price, compared to similar offerings in the market

Criterion 4: Positioning

Requirement: Products or services unique, unmet need that competitors cannot easily replicate or replace

Criterion 5: Design

Requirement: The product features an innovative design, enhancing both visual appeal and ease of use

Business Impact

Criterion 1: Financial Performance

Requirement: Strong overall financial performance in terms of revenues, revenue growth, operating margin and other key financial metrics

Criterion 2: Customer Acquisition

Requirement: Product strength enables acquisition of new customers, even as it enhances retention of current customers

Criterion 3: Operational Efficiency

Requirement: Staff is able to perform assigned tasks productively, quickly, and to a high quality standard

Criterion 4: Growth Potential

Requirements: Product quality strengthens brand, reinforces customer loyalty and enhances growth potential

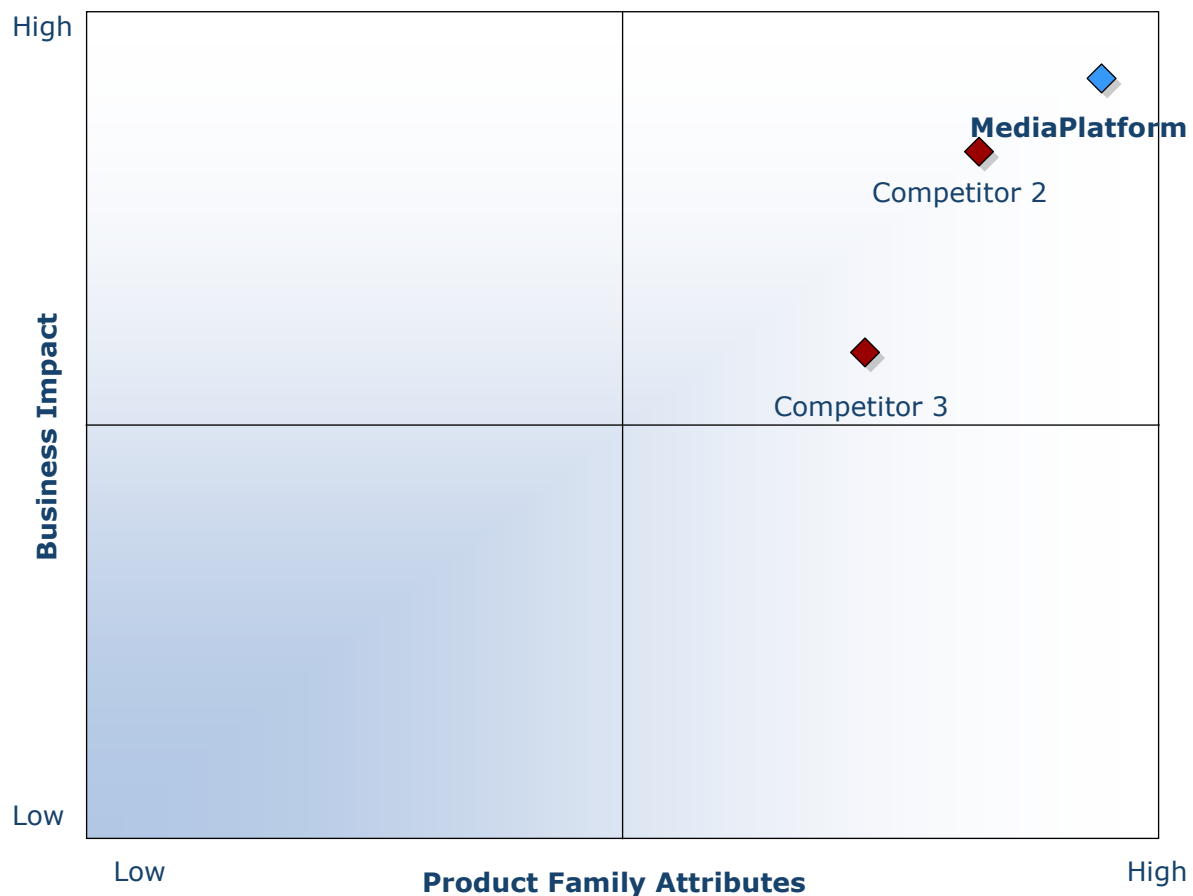
Criterion 5: Human Capital

Requirement: Company culture is characterized by a strong commitment to product quality and customer impact, which in turn enhances employee morale and retention

Decision Support Matrix

Once all companies have been evaluated according to the Decision Support Scorecard, analysts can then position the candidates on the matrix shown below, enabling them to visualize which companies are truly breakthrough and which ones are not yet operating at best-in-class levels.

DECISION SUPPORT MATRIX: PRODUCT LEADERSHIP AWARD



The Intersection between 360-Degree Research and Best Practices Awards

Research Methodology

Frost & Sullivan's 360-degree research methodology represents the analytical rigor of our research process. It offers a 360-degree-view of industry challenges, trends, and issues by integrating all 7 of Frost & Sullivan's research methodologies. Too often, companies make important growth decisions based on a narrow understanding of their environment, leading to errors of both omission and commission. Successful growth strategies are founded on a thorough understanding of market, technical, economic, financial, customer, best practices, and demographic analyses. The integration of these research disciplines into the 360-degree research methodology provides an evaluation platform for benchmarking industry players and for identifying those performing at best-in-class levels.

360-DEGREE RESEARCH: SEEING ORDER IN THE CHAOS



About Frost & Sullivan

Frost & Sullivan, the Growth Partnership Company, enables clients to accelerate growth and achieve best in class positions in growth, innovation and leadership. The company's Growth Partnership Service provides the CEO and the CEO's Growth Team with disciplined research and best practice models to drive the generation, evaluation and implementation of powerful growth strategies. Frost & Sullivan leverages over 50 years of experience in partnering with Global 1000 companies, emerging businesses and the investment community from 40 offices on six continents. To join our Growth Partnership, please visit <http://www.frost.com>.