

Market Share Leadership of the Year Web-Based Clientless Remote Support Global 2010

Frost & Sullivan's Global Research Platform

Frost & Sullivan is entering its 50th year in business with a global research organization of 1,800 analysts and consultants who monitor more than 300 industries and 250,000 companies. The Company's research philosophy originates with the CEO's 360 Degree Perspective,* which in turn serves as the foundation of its TEAM Research** methodology. This unique approach enables us to determine how best-in-class companies worldwide manage growth, innovation and leadership. Our research team is proud to present the 2010 Global Market Share Leadership of the Year Award in Web-Based Clientless Remote Support to Citrix Online.

Significance of the Market Share Leadership Award

Key Industry Challenges Addressed by Increased Market Share

The ongoing economic recession and cut backs of skilled IT workers along with increased globalization has led to the increase in demand for web based services, including remote support. Being a cost-effective option, the business case for these support services is strong across the globe. The number of remote and mobile workers as a percentage of the total workforce has risen, leading to a healthy growth trend for the remote support industry. Market dynamics have also changed significantly in the past few years, leading to an increased emphasis on customer service. These factors, coupled with the prevalence of broadband and the widespread adoption by small businesses, have played a significant part in the 2009 revenues that the clientless web-based remote support market has witnessed – \$209.3 million.

Citrix Online's GoToAssist (GTA) solution has found favor with users, for both internal and external support. In 2009, Citrix Online remained a market leader, maintaining a market share of 30 percent in the global remote support industry.

Best Practice Award Analysis for Citrix Online, Inc.

The Frost & Sullivan Award for Market Share Leadership is presented to the company that has demonstrated excellence in capturing the highest market share within its industry. The Award recognizes the company's leadership position within the industry in terms of revenues or units, as specified.

Citrix Online's Performance in the Remote Support Industry

Frost & Sullivan's research shows that in 2009 Citrix Online achieved a revenue market share of 30 per cent in the world clientless web-based remote support market, maintaining the strong leadership position from 2008. The major portion of the company's revenues comes from North America, in addition to a fast growing regional presence in the European and Asia Pacific regions.

Key Performance Drivers for Citrix Online

Citrix Online's GoToAssist has a strong focus across all levels of customers, including small businesses and big corporations. The company's offerings are designed to be simple to use, secure, cost-effective and reliable.

Factor 1: Success of the GoToAssist solution

GoToAssist has penetrated the internal support market, in addition to external support. The product has a strong traction with IT consultants. GoToAssist Express is very price competitive and is drawing the attention of single person IT professionals that were previously using RDP or VNC for tech support. GoToAssist Express also includes a strategic pricing option of a one-day pass that allows customers to "try before they buy" but experience the full potential of the solution as opposed to free versions available from other vendors that have limitations. Accordingly, the company has increased its share of SMB/single person IT professionals by multiple-fold.

Factor 2: Global acceptance

Citrix Online's marketing strategy across the globe has been extremely effective. Although the company holds a larger market share in the remote support market for North America, it is aggressively expanding its presence in Europe and Asia Pacific, indicating the company's prospects of a strong global footprint. The uptake for GoToAssist has been tremendous, due to its primary value proposition of simplicity and ease of use.

Factor 3: Resilience in a competitive environment

Citrix Online has maintained a strong grip on the market and continues to have a dominating position, building on the strong performance it has already displayed in other web collaboration markets with its GoToMeeting, GoToWebinar and GoToTraining solutions. With the addition of GoToManage and a fast evolving audio conferencing portfolio, Citrix Online has clearly become a force to reckon with in the overall conferencing and collaboration market. While several of its competitors are focused on specific verticals; Frost & Sullivan notes that Citrix Online has catered to a wide range of users and use cases in customers across verticals and has popular pricing options that ensure retention of its installed base in tough economic times. The company's pricing – 1-

day passes are successful in the small consultant market because they can bill it to the project on an ad hoc basis. In addition, Citrix Online offers various other pricing models.

Factor 4: Innovation for the future

Citrix Online has recognized that several factors would be key to innovate in this segment, in the future. The trend of convergence of attended and unattended support implies that time consuming fixes are performed during non-peak hours, improving productivity and driving resolution of cases upward. With GoToAssist Express and Corporate versions, the company has best in class offerings currently. Continued innovation through extensive R&D would enable the company to build a more futuristic and secure solution that would be tailor-made for mobile devices to offer anytime, anywhere, any platform support.

Frost & Sullivan believes that Citrix Online has effectively leveraged its expertise in the remote support market, and has achieved the market leadership position through sound strategy and excellent implementation and delivery of their solutions. The company's global footprint is set to grow and the current market leadership status is testimony to that.

Based on the aforementioned factors, Frost & Sullivan is proud to present the 2010 Global Market Share Leadership of the Year Award in Web-Based Clientless Remote Support to Citrix Online.

The CEO 360 Degree Perspective™ - Visionary Platform for Growth Strategies

The CEO 360 Degree model provides a clear illustration of the complex business universe in which CEOs and their management teams live today. It represents the foundation of Frost & Sullivan's global research organization and provides the basis on which companies can gain a visionary and strategic understanding of the market. The 360 degree perspective is also a "must-have" requirement for the identification and analysis of best-practice performance by industry leaders.

The 360 degree model enables our clients to gain a comprehensive, action-oriented understanding of market evolution and its implications for their companies' growth strategies. As illustrated in Figure 5 below, the following six-step process outlines how our researchers and consultants embed the 360 degree perspective into their analyses and recommendations:

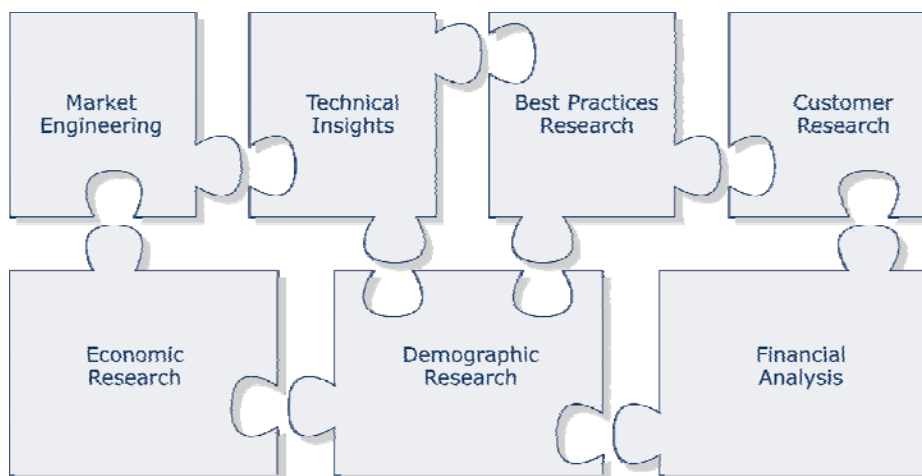
Figure 5: The CEO's 360 Degree Perspective Model



Critical Importance of TEAM Research

Frost & Sullivan's TEAM 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. Our experience has shown over the years that companies too often make important growth decisions based on a narrow understanding of their environment, leading to errors of both omission and commission. Frost & Sullivan contends that the successful growth strategies are founded on a thorough understanding of market, technical, economic, financial, customer, best practices and demographic analyses. In that vein, the letters T, E, A and M reflect our core technical, economic, applied (financial and best practices) and market analyses. The integration of these research disciplines into the TEAM Research methodology provides an evaluation platform for benchmarking industry players and for creating high-potential growth strategies for our clients.

Figure 6: Benchmarking Performance with TEAM Research



About Citrix Online

Citrix Online, a division of Citrix Systems, is a worldwide leader in remote support, remote access and Web conferencing. Information on Citrix Online can be found at <http://www.CitrixOnline.com>.

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 almost 50 years of experience in partnering with Global 1000 companies, emerging businesses and the investment community from 31 offices on six continents. To join our Growth Partnership, please visit <http://www.frost.com>.