



# LIMELIGHT NETWORKS

Driving Performance, Productivity and Protection at the Edge

# SAFE HARBOR

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# AGENDA

01

POSITIONING FOR GROWTH & PROFITABILITY

*Bob Lyons, CEO*

02

UNPACKING THE STRATEGY

*Ajay Kapur, INCOMING CTO*

03

HIGH VELOCITY SALES

*Eric Armstrong, SENIOR VICE PRESIDENT GROWTH*

04

A LOOK AHEAD

*Bob Lyons, CEO*

05

Q&A



**01**

# **POSITIONING FOR GROWTH & PROFITABILITY**

BOB LYONS, CEO

# EXPANDING BEYOND WHITE LABEL CDN TO EDGE ENABLED APPLICATION ORCHESTRATION

## VIDEO & SOFTWARE CDN

2001 - 2020

- Large Customer Video CDN
- Non-committed Revenue
- Concentrated Customer Base
- Focus On Building Capacity
- Low Gross Margin (Network Utilization)

## GROWTH & PROFITABILITY

2021

### Improve

- Network Performance
- ~(\$30M) Costs

### Expand

- Client Success
- Sales & Marketing

### Extend

- Applications

## CONTENT & APPLICATIONS

2022 - Forward

- Edge Enabled Solutions
- + Recurring Revenue
- Diversified Customer Base
- Focus On Network Utilization
- Growth & Profitability

# WHAT WE MUST KNOW TO BE TRUE

- A large addressable **profit pool** exists for underserved **outcome buyers**
- We can establish a **right to win** with these buyers
- Our platform development approach will create **R&D** leverage
- We will be an **execution** focused company

# THE DIGITAL TRANSFORMATION HAS CREATED BOTH OPPORTUNITIES & CHALLENGES



The screenshot shows the top navigation bar of the CIO magazine website. The logo 'CIO' is on the left, followed by 'UNITED STATES' with a dropdown arrow. Other navigation items include 'MAGAZINE', 'AWARDS', 'EVENTS', 'CIO THINK TANK', and 'IDG TECH(TALK) COMMUNITY'. Below the navigation bar, the breadcrumb trail reads 'Home > IT Leadership > Digital Transformation'. The main content area features a 'FEATURE' label in red, followed by the article title 'What is digital transformation? A necessary disruption' in a large, bold font. Below the title is a short introductory paragraph: 'Digital transformation is a foundational change in how an organization delivers value to its customers. Here is what transformation entails, along with tips to ensure your company is on the correct course.'

**Digital transformation will spur economic boom in 2021, CEOs tell Gartner**

# THE RISE OF THE OUTCOME BUYER

TODAY'S CLOUD SERVICE GIANTS CATER PRIMARILY TO **TOOL** BUYERS  
THERE IS A LARGE CUSTOMER SEGMENT THAT WOULD PREFER TO BUY **OUTCOMES**

## TOOL BUYERS

~83% OF TAM

- Seek robust features and functions from each tool
- Self-reliant to integrate & customize tools
- Usage based packaging & pricing
- Requires increasingly scarce in-house know-how



## OUTCOME BUYERS

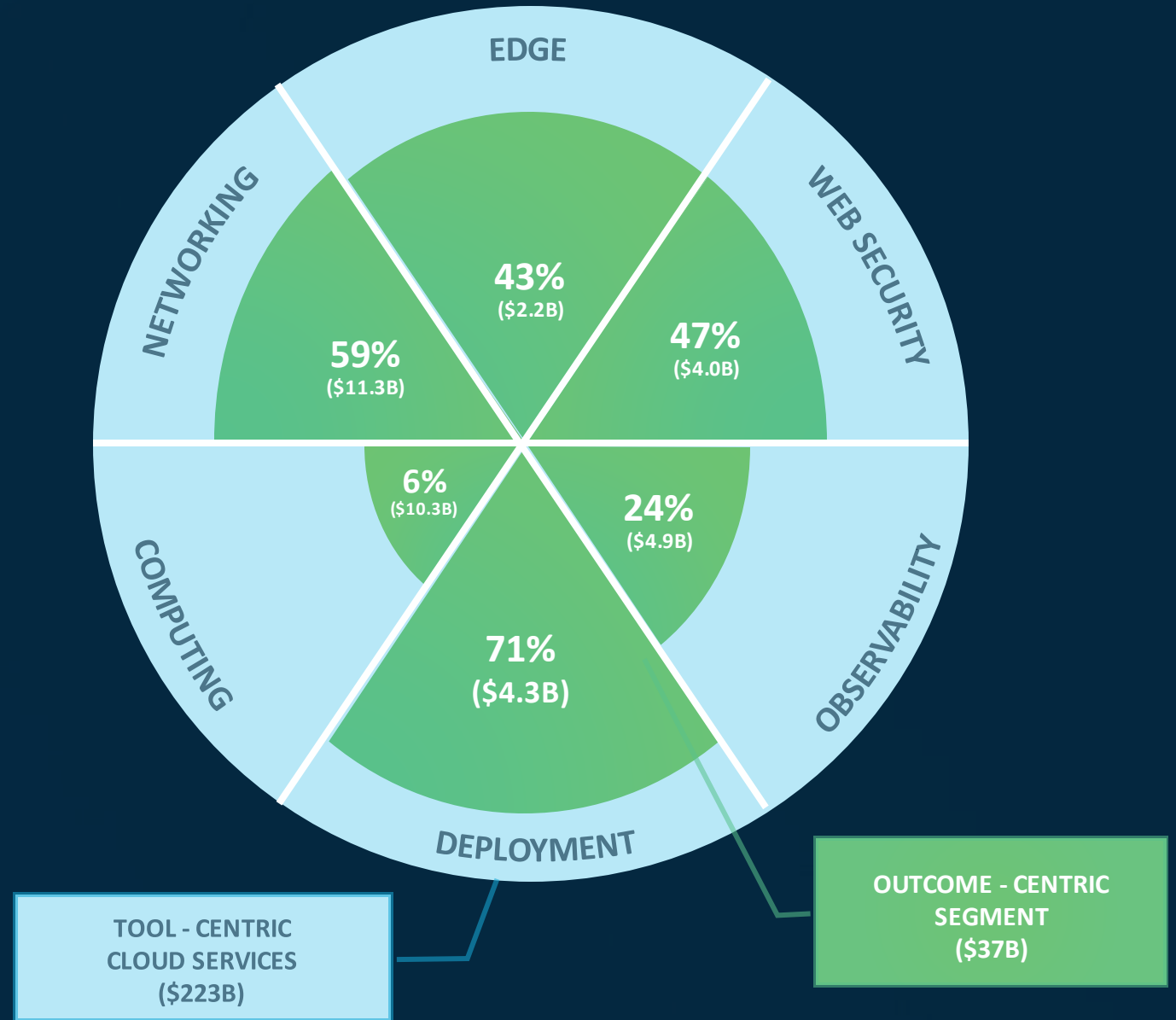
~17% OF TAM

- Seek integrated solutions that deliver outcomes
- A mix of managed and self-service usage models
- Simplified and inclusive packaging & pricing
- Reduces reliance on in-house know-how



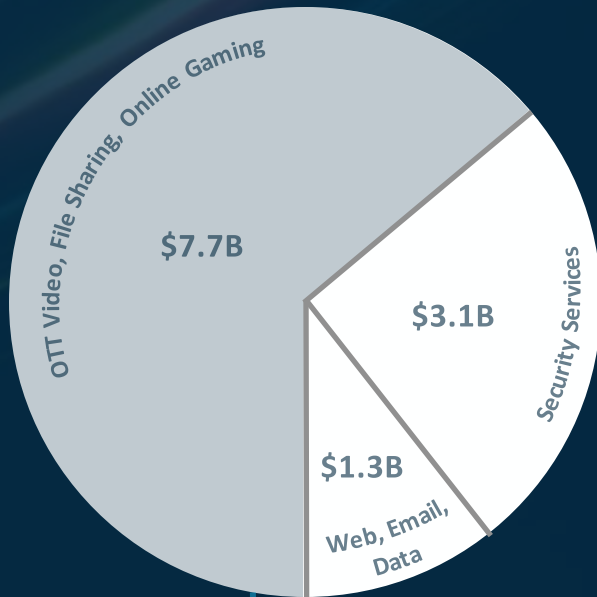


# THEY REPRESENT A \$37B MARKET OPPORTUNITY

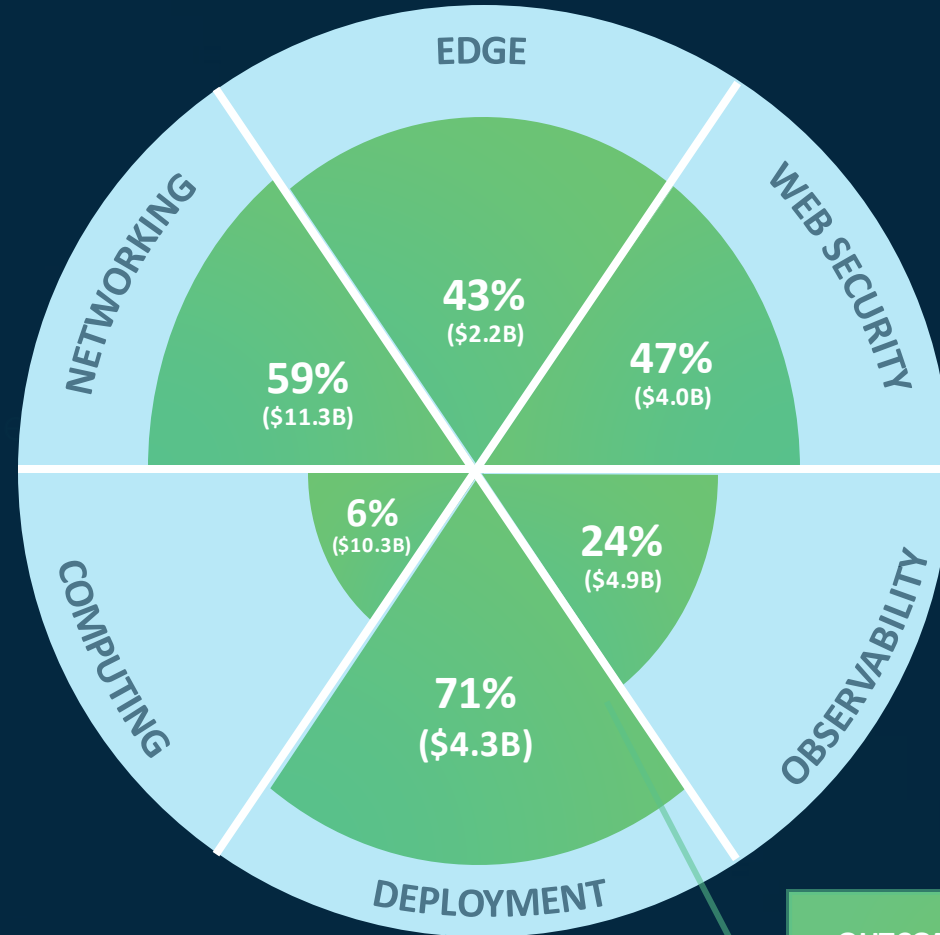


# A 4X EXPANSION OF OUR ADDRESSABLE MARKET

White Label CDN TAM



Edge Application Orchestration TAM



**Total white label  
CDN market  
\$12.1B (2022)**

**TOOL - CENTRIC  
CLOUD SERVICES  
(\$223B)**

**OUTCOME - CENTRIC  
SEGMENT  
(\$37B)**

# OUTCOME BUYERS ARE 6X MORE LIKELY TO BUY AN OUTCOME - ORIENTED SOLUTION

## DIGITAL VELOCITY

Above average number of unique visitors to a site

2,000+ characteristics

20k 3<sup>rd</sup> party signals

Technology profile

3<sup>rd</sup> party usage

## IT WORKLOAD COMPLEXITY

More than 3 workloads behind a firewall

**Identify** – Predictive model that helps identify potential

**Prioritize** – Leverage intent data to prioritize contact strategy

**Grow** – Develop focused campaigns to high-potential targets

## DATA INTENSITY

More than 4 unique databases behind a firewall

## Analytics Driven Lead Gen

Algorithm Generating Model

Profile Identification

Targeted focus on high potential

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# A RIGHT TO WIN REQUIRES



# WORLD CLASS GLOBALLY SCALED NETWORK

110

Terabits per second

140+

Global PoPs

1000+

ISP Connections

50+

Countries Served



# EXPANDED EDGE CAPABILITIES WITH LAYER0

1.5T

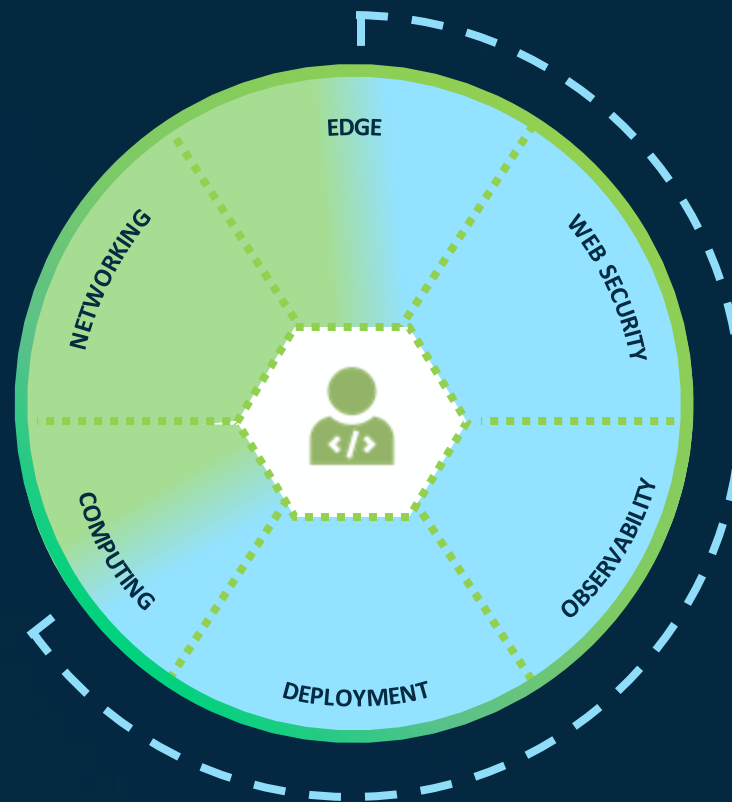
DAILY EVENT COUNT CAPACITY  
Observability

600ms

PAGE LOAD TIMES  
Application Acceleration

2x

RELEASE VELOCITY  
Productivity



# A FOUNDATION OF CLIENT SUCCESS

 Limelight

 Layer0



“ We've scaled our traffic with Limelight and observed zero issues in scaling and performance. That's impressive and we're happy to have Limelight as part of the family.

*Vice President Quality & CDN Management, leading OTT company*

We've enjoyed our relationship with Limelight and are excited to partner again.

*Partner Group Program Manager, leading software company*

” It is insane how with Layer0 we can load pages instantly, and yes, instantly!

*Head of Digital Platforms, top 5 global consulting firm*

Immediately, we saw lifts in conversions and AOV.

*Digital Development, large ecommerce site*

The developer velocity increased dramatically!

*Head of Technology, fashion retailer*



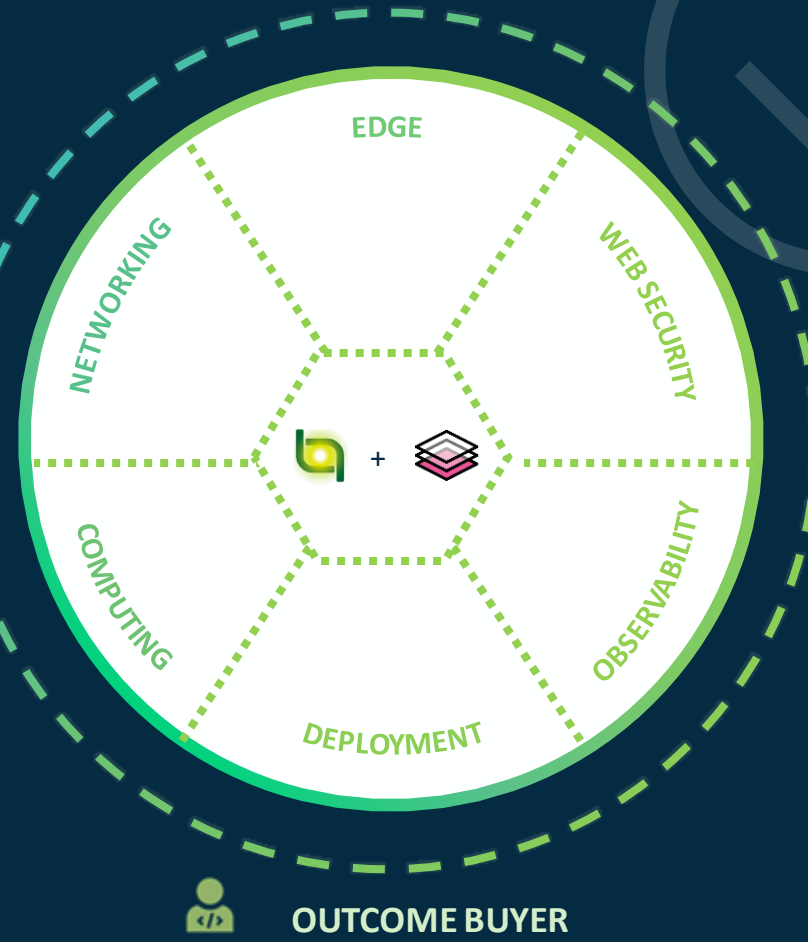
# COORDINATION DRIVES BETTER OUTCOMES

PERFORMANCE, PRODUCTIVITY, PROTECTION



TOOL BUYER

VS



OUTCOME BUYER

# WHAT WE MUST KNOW TO BE TRUE

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# A PLATFORM APPROACH TO CREATE R&D LEVERAGE



**Own  
Coordination**



**Rent  
Capabilities**



**Build for 80/20**



**Reuse  
Services**

# WHAT WE MUST KNOW TO BE TRUE

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# AN EXECUTION FOCUSED COMPANY



## Improve

- 24 Critical KPIs with instrumentation
- 4P:90 operational planning and governance
- Client performance center
- Reduced operating costs by ~ \$30M
- Meaningful improvements to client performance



Profitability



## Expand

- Redesigned marketing and sales engine
- 150% qualified pipeline growth in last 6 months
- 18 of top 20 customers have grown 20% YOY



Growth



## Extend

- Strategic acquisition of Layer0
- Immediate launch of best-in-class application solution
- SaaS product and engineering capabilities
- Software architecture that can optimize our global platform
- ISP strategy



+



Profitability

Growth

# LIMELIGHT 2.0

Building on the world's largest global private network, Limelight is uniquely positioned to be the leader in edge application orchestration and content delivery for technology outcome buyers that seek global scale, performance, productivity and protection.



**OUTCOME BUYER**

Performance , Productivity, Protection

Content Delivery

Application Orchestration

**Total Performance Client Success Model**

**Edge Platform**

**Global Private Network**



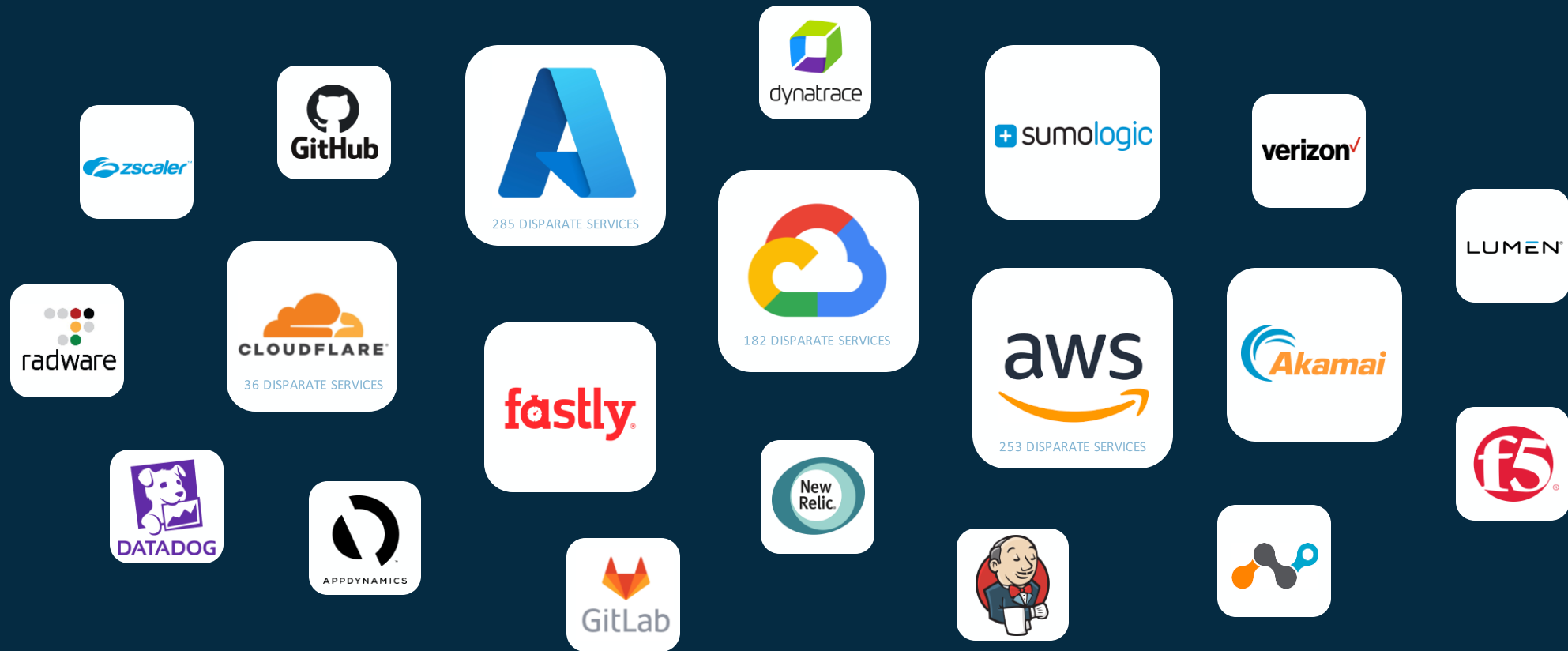
02

## UNPACKING THE STRATEGY

AJAY KAPUR, INCOMING CTO

# THOUSANDS OF POINT CLOUD TOOLS

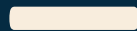
OVER THE LAST DECADE, AWS INITIATED AN EXPLOSION OF POINT TOOLS FOR BUILDERS





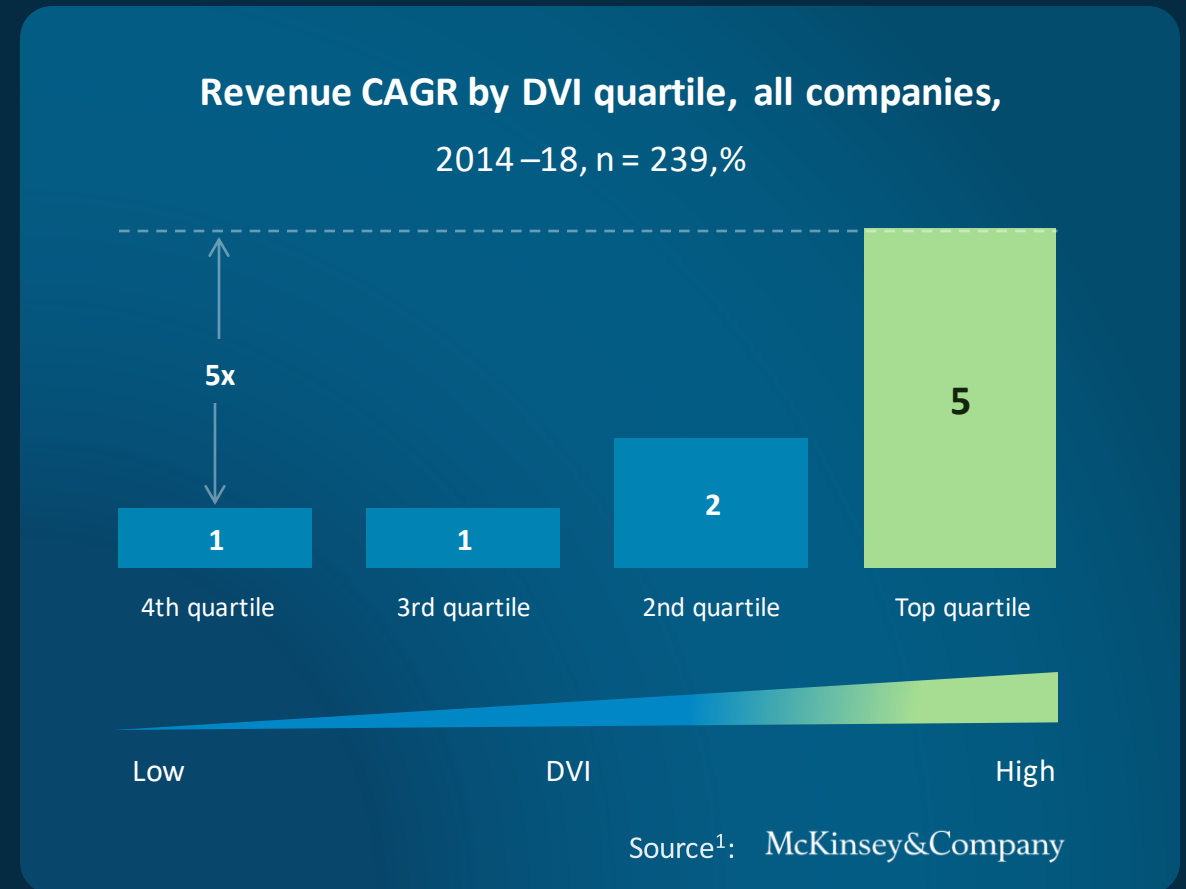
# YET ...

**Performance, productivity and protection remain a challenge**



# TEAMS ARE OVERBURDENED AND INEFFICIENT

- ✓ Top quartile dev teams grow revenue 5x faster<sup>1</sup>
- ✓ 96% of management considers developer productivity a high or medium priority<sup>1</sup>
- ✓ Tech talent shortage is projected to grow from 1.2M (2020) to 4.3M in 2030<sup>2 d</sup>



<sup>1</sup> McKinsey, “Developer Velocity: How software excellence fuels business performance” (2020)

<sup>2</sup> Korn Ferry, “Global Talent Crunch” Report (2018)

# WEBSITES AND ENTERPRISE APPS ARE SLOW

**75%**

of sites fail Google's site speed ranking metrics

**24%**

Of users are less likely to abandon passing sites

# CYBERSECURITY BREACHES ARE COSTLY

**39%**

Of breaches start with  
Web apps

**\$3.9M**

Average cost of a  
breach

# THE INTERNET STRUGGLES TO SUPPORT 4K VIDEO

**5X**  
larger than 1080p

**60%**  
Firms consider live  
“a very big challenge”

# PLACING A HEAVY BURDEN ON TECHNOLOGY BUILDERS AND OPERATORS

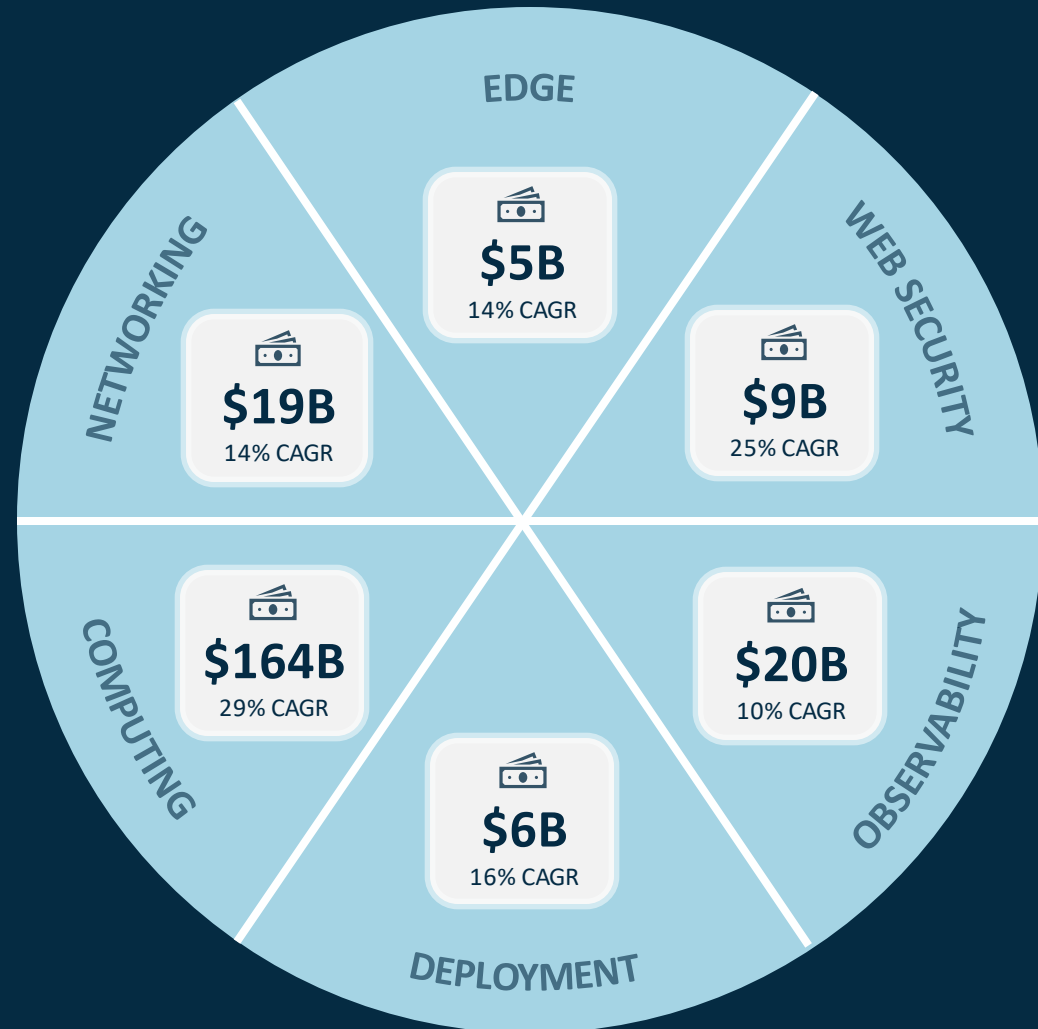


# ASSEMBLING AN APPLICATION STACK REQUIRES SCARCE SKILLS AND NUMEROUS TOOLS



TECHNOLOGY-CENTRIC  
CLOUD SERVICES

AND COLLECTIVELY  
REPRESENTS AN  
ENORMOUS \$223B IN  
ANNUAL COST





# LIMELIGHT APPLICATION ORCHESTRATION

WE AIM TO LEAD THIS CATEGORY TO FILL THE GAP CREATED BY THE \$223B CLOUD TOOL INDUSTRY

2000 - 2021

## CONTENT DELIVERY

**WHAT** Video streaming and gaming/software downloads

**WHY LIMELIGHT** Most performant streams at the lowest cost

2021 - BEYOND

## CONTENT DELIVERY


## APPLICATION ORCHESTRATION

**WHAT** Web apps and API hosting, delivery, and data transfer

**WHY LIMELIGHT** Easiest to develop, sub-second secure application delivery and hosting

# FAR BETTER OUTCOMES FOR LOWER COST


IN THE NEXT DECADE, INTEGRATED CLOUD SOLUTIONS FOR OUTCOME BUYERS WILL DOMINATE


 \$2M of integration costs  
 Ongoing maintenance  
 Worse performance

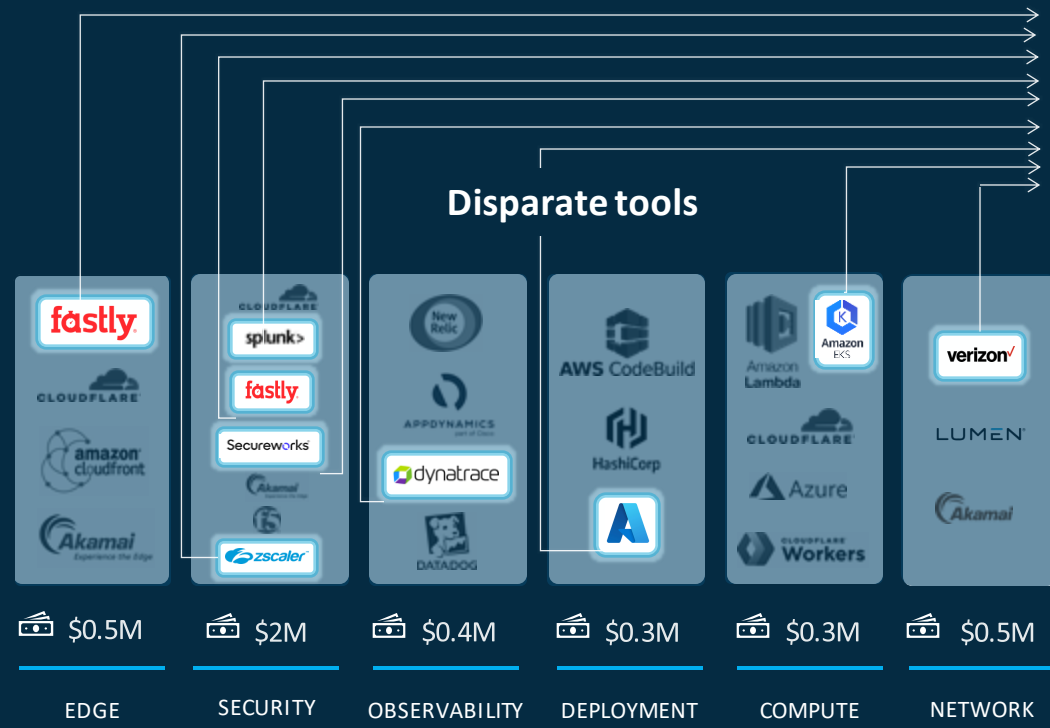
\$6M

\$2M

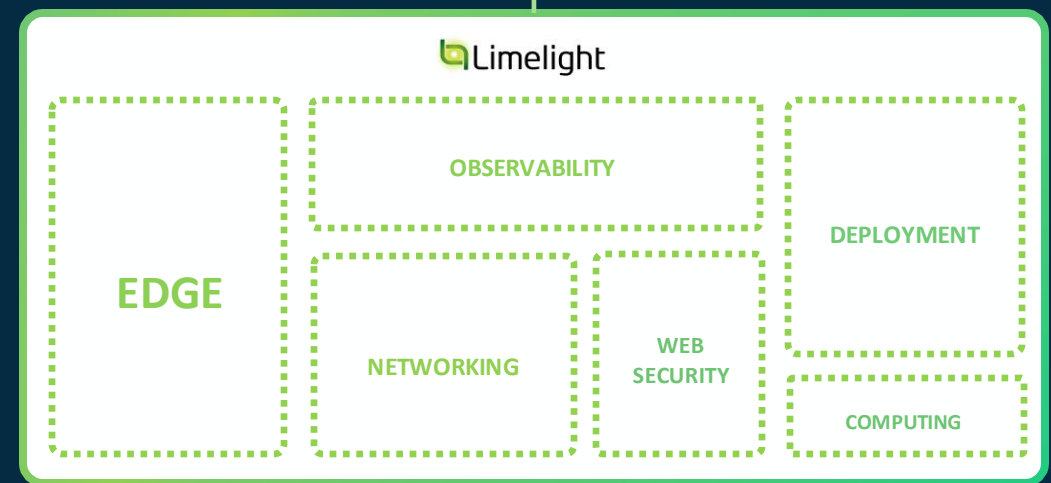
Higher productivity  
 Better performance  
 Better protection




Builder



Integrated offering



# OPENING MEANINGFUL PROFIT POOLS

POWERFUL INDUSTRY TRENDS THAT DRIVE GROWTH AND COMMITTED REVENUE

## PROFIT POOLS



\$7.7B



\$37B  
growing at 24%

## SAMPLE VENDORS

WITH FORWARD REVENUE MULTIPLES



**Akamai** 5x

LUMEN<sup>®</sup> 2.4x



cloudflare 44x

fastly 11x

Megaport 20x

aws 10x+

▲ Vercel 30x+

## TRENDS



4K video  
Explosive growth in OTT & gaming



Rise of developer over devops  
Jamstack; Headless  
Speed = SEO  
Multi-cloud

## UNIVERSAL TRENDS



Distributed workloads (and need for solutions at the Edge)  
Rise of solutions buyer (in response to 100s of point solutions)

# A UNIQUE, LEVERAGED APPROACH TO R&D

WE CAN DIFFERENTIATE RAPIDLY WITH RELATIVELY MODEST R&D INVESTMENTS



## Own Coordination

Focus on how features work together deliver outcomes, not breadth of features



## Rent Capabilities

Leverage open source, OEM and public cloud technology



## Build for 80/20

Focus on the 20% of features that drive 80% of value

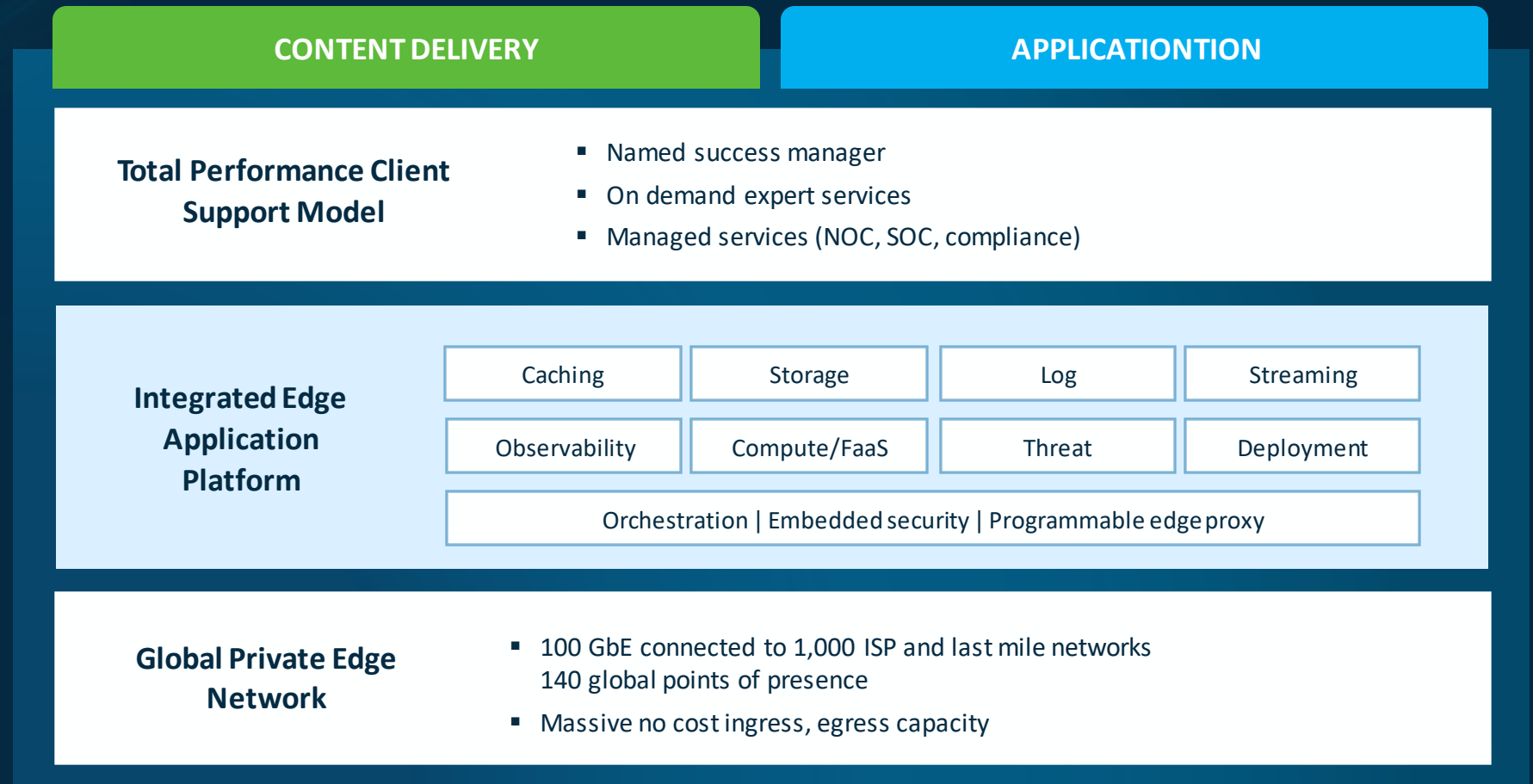


## Reuse Services

Reuse core services from the Edge Application Platform across three solutions

# EACH SOLUTION IS BUILT ON THE SAME PLATFORM

THE LIMELIGHT / LAYERO COMBO PROVIDES THE NEEDED SET OF ASSETS & CAPABILITIES



# ENTER NEW MARKETS WITH DISRUPTIVE ECONOMICS

OUR UNUSED CAPACITY OFFERS AN OPERATING COST ADVANTAGE

## CONTENT DELIVERY

Software downloads



- Leverage “free” off-peak capacity
- Increase utilization

## APPLICATION ORCHESTRATION

Web apps and APIs  
Multi-cloud interconnect



- Leverages “free” off-peak capacity
- Leverage “free” ingress capacity

# LIMELIGHT CONTENT DELIVERY SOLUTION

—  
Performant data streams  
delivered at the optimal  
cost



Today  
Content delivery

\$200M+ IN TTM REVENUE

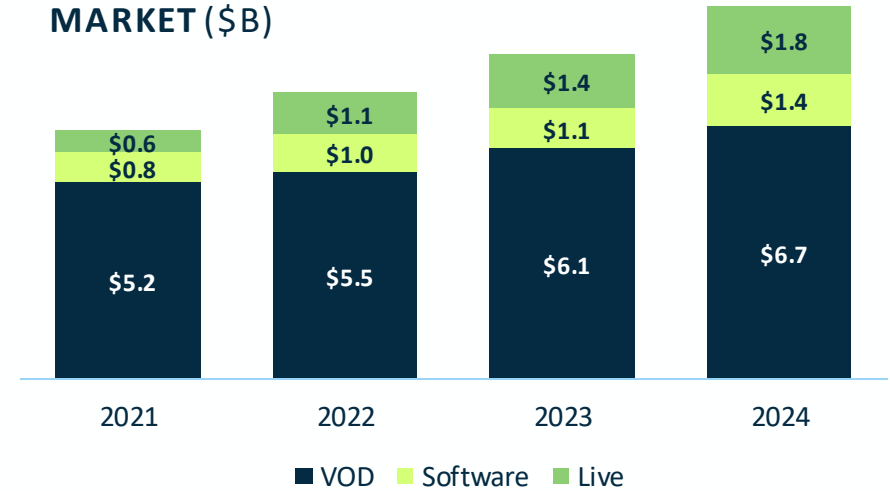
2022

+ Software-first network

## WHAT WE DELIVER

- Video on demand streaming
- Software and gaming downloads
- Live event streaming

## LARGE, GROWING MARKET (\$B)



## TRUSTED BY THE MOST DEMANDING MEDIA BRANDS



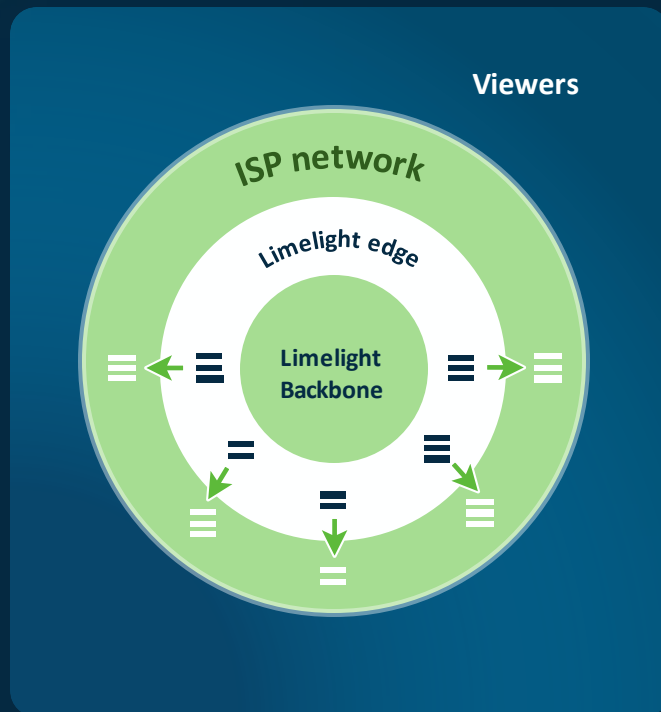
# LIMELIGHT CONTENT DELIVERY SOLUTION

CONTINUE TO IMPROVE GROWTH AND PROFITABILITY OF OUR CORE BUSINESS

## Evolve to a lower cost network

Extend our intelligent network into ISP's infrastructure

Software-based, standard deployment architecture



## Total performance expert-led support

Our support is the best in the industry and is staffed by expert network performance engineers



Limelight is the most responsive team amongst providers

*Patrick Lee, Senior Architect, Amazon Prime Video*



Limelight is the best

*Kyungheun Shin, Director, SW Update, Samsung Electronics*



Limelight understands our service very well

*Hiroyuki Matsushima, Senior Engineer Operation Dept, Sony*



Great experienced team - knowledgeable and helpful

*Director Infrastructure and CDN, British Telecom*



I interact with multiple CDNs...LLNW is the easiest team to work with...their support team is the most prompt...they really stand out compared to other CDNs

*Director of Engineering, Viki*



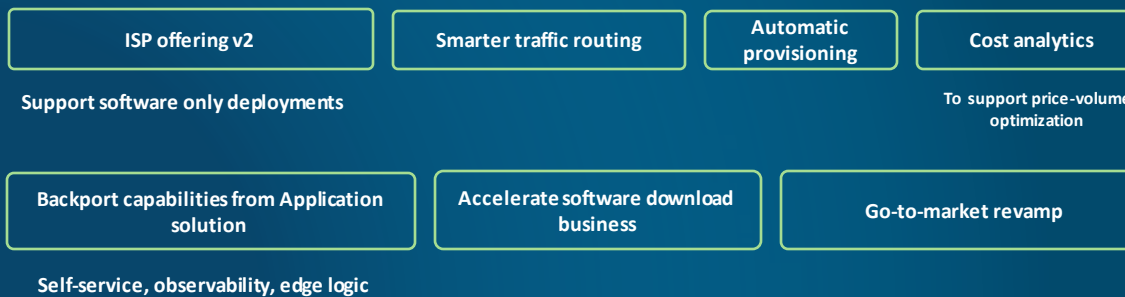


# EVOLVING TOWARD ASSET-LIGHT ARCHITECTURE

## Grow our asset-light service provider offering

	POPs on our infrastructure	POPs on ISP's infrastructure
Infrastructure build out	Capex cost center	Profit center generating \$7M in EBITDA in the last 12 months
Operating costs	Fixed + variable	Pure variable at 60% gross margins
ISP relationship	Vendor	Revenue share partner motivated to attract new content provider customers
Limelight R&D	Telecom	Software

## Software-centric roadmap



1

Grow revenue at the price-conscious, high-end of the market via price-volume optimization

Increase margins and utilization

2

3

Lower capital intensity

# LIMELIGHT APPLICATION ORCHESTRATION SOLUTION

Instant, secure web apps and APIs built and run by productive teams



Today

Web acceleration  
Edge hosting  
Web delivery & security

2022

+ API security and hosting  
+ Multi-cloud interconnect

2023

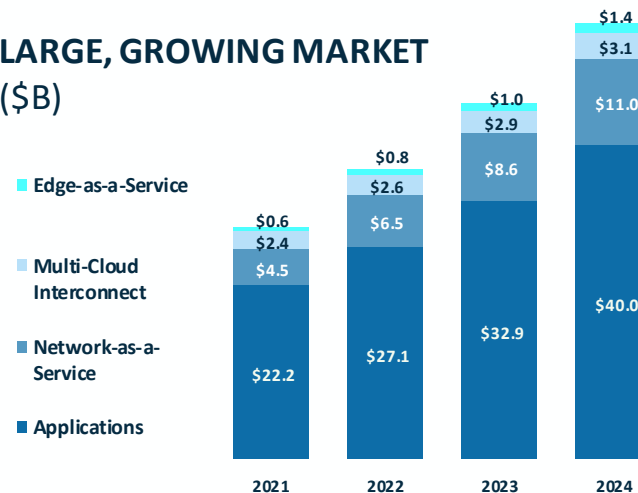
+ Network-as-a-Service

\$20M IN RUN RATE REVENUE

## WHAT WE DELIVER

- Web applications
- APIs
- Multi-cloud data

## LARGE, GROWING MARKET (\$B)



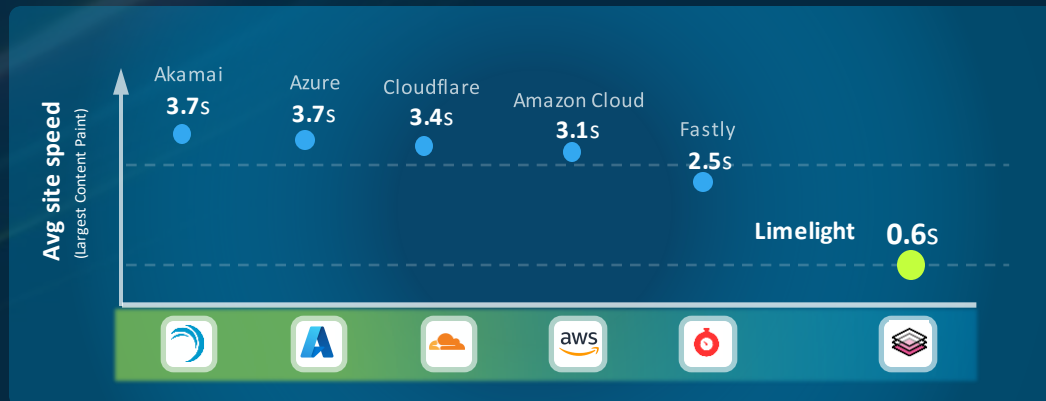
## BUILDER-CENTRIC CLOUD SERVICE



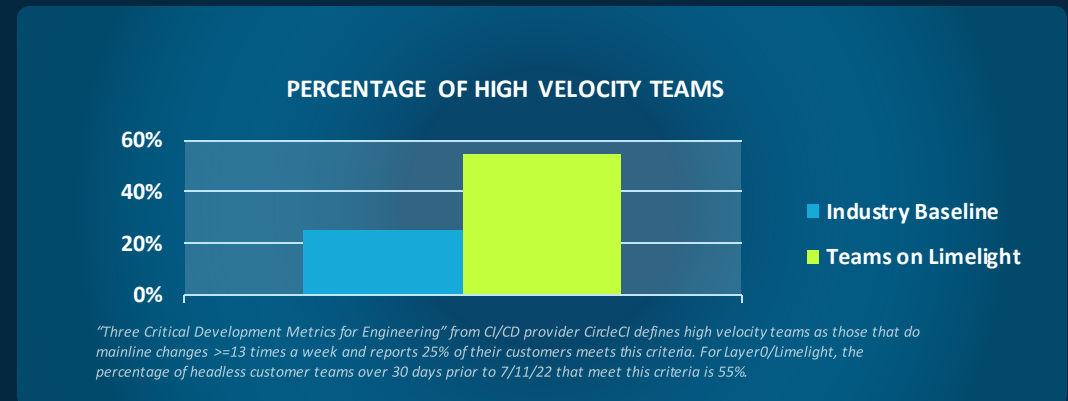
# LIMELIGHT APPLICATION ORCHESTRATION SOLUTION

THE MOST IMPACTFUL SOLUTION ACCORDING TO OUR CUSTOMERS

## Sub-second web applications



## Dev teams release up to twice as often



It is insane how with Limelight we can load pages instantly, and yes, instantly!

Head of Digital Platforms, Top 5 Global Consultancy

**kate spade**  
NEW YORK

**450ms LCP**  
4X REDUCTION

**+12%**  
REVENUE PER USER

**SHOE CARNIVAL**

**500ms LCP**  
12X REDUCTION

**+40%**  
CONVERSION RATE

**REVOLVE**

**337ms LCP**  
12X REDUCTION

**+7%**  
REVENUE



**71%**  
FASTER LCP

**99 scores**  
2.5X LIGHTHOUSE



Being able to have cache policies be part of the code base, be locally testable and unit tested and all these other sorts of things would be a huge benefit over Akamai.

Sr. Software Developer, Top Fashion Brand



Time to production has drastically decreased on Limelight.

Tyler Drone, Sr. Manager of Digital Development, Shoe Carnival



Creating environments is a breeze...on AWS would it take...2 to 4 hours.

Technical Lead, Burst Oral Care



One of the best parts of working with Limelight has been the support...people...who actually care and want to...make our product better.

John Beadles, Lead Software Engineer, Turkey Vacation Rentals

# LIMELIGHT APPLICATION ORCHESTRATION SOLUTION

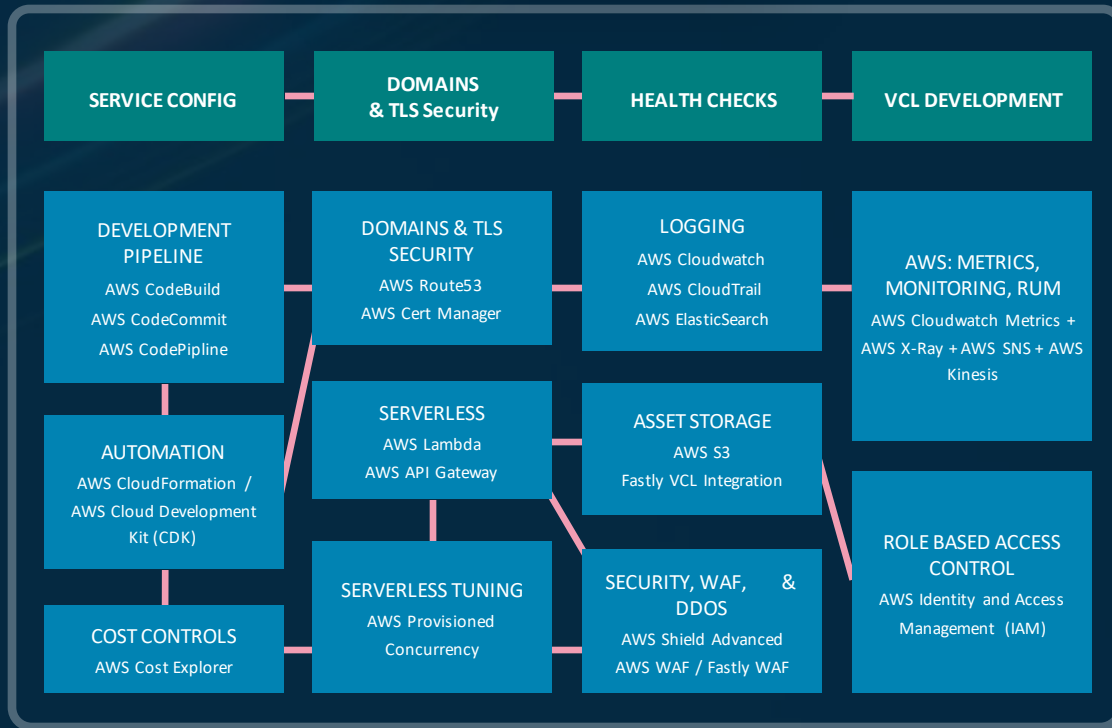
OUR COORDINATED COMPLETE SOLUTION DELIVERS UNMATCHED OUTCOMES

Performance and productivity delivered through a coordinated, integrated solution



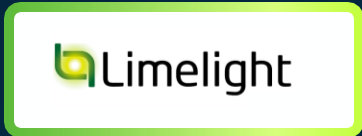
# OUTCOME BUYERS DEMAND SIMPLICITY

WHILE POINT TOOL CLOUD VENDORS ARE BUSY CHASING ONE ANOTHERS' SPEEDS & FEEDS



Requires integrating over 20 different services

Repeat **1-3X** times across multiple AWS regions and zones



VS.

\$ limelight deploy

✓ Run one command and you're done

# LIMELIGHT APPLICATION ORCHESTRATION

THE MOST ROBUST SOLUTION FOR WEB APPS AND APIs

	LIMELIGHT	CLOUDFLARE	AWS	FASTLY	AKAMAI
WEB ACCELERATION					 DSA IS NOT A PRODUCT
EDGE HOSTING SELF SERVICE		 STATIC SITES ONLY	 STATIC SITES ONLY		
EDGE EXPERIMENTS					
EDGE CACHE + LOGIC	 Q3 2021				
EDGE SECURITY	 Q4 2021				

# PRODUCT INVESTMENT PRIORITIES

AGGRESSIVELY ENTER APPLICATION DELIVERY MARKET; BACKPORT IMPROVEMENTS TO CONTENT





03

## HIGH VELOCITY SALES

ERIC ARMSTRONG, SVP GROWTH



# OUR GO-TO-MARKET EXPANSION STRATEGY

## Content Delivery

We win MEDIA and ISPs through surgical direct sales and with a disruptive partner model

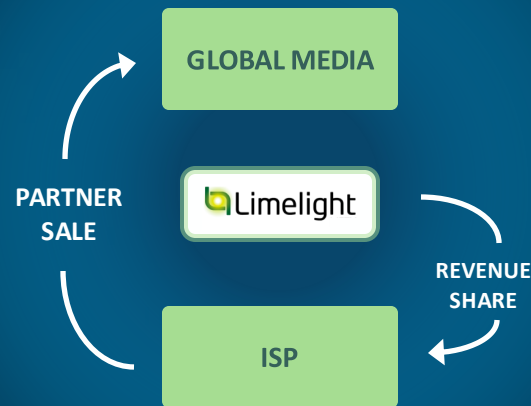
## Application Orchestration

Our more complete, outcome-driven solution gives us many more vectors than our competitors to engage a prospect

### GLOBAL MEDIA Direct

- 300+ named accounts
- Offer best price-for-reliability in the market
- Sell value of expert services
- Arm sales with granular cost-capacity data
- Value based pricing for low-latency live event streaming

### GLOBAL ISP Direct and Partner Model



### Limelight

Devops, Secops, Developer, Business owner, SEO, Marketing, Finance, Ecommerce

Web CDN  
 Web acceleration  
 Jamstack deployments

Enterprise sales  
 Transactional sales  
 Self-service

MORE BUYERS

MORE VALUE

SALES MODELS

- FASTLY -
- AWS -
- CLOUDFLARE -
- AKAMAI -

Devops, Secops

Web CDN

Enterprise sales  
 Transactional sales  
 Self-service

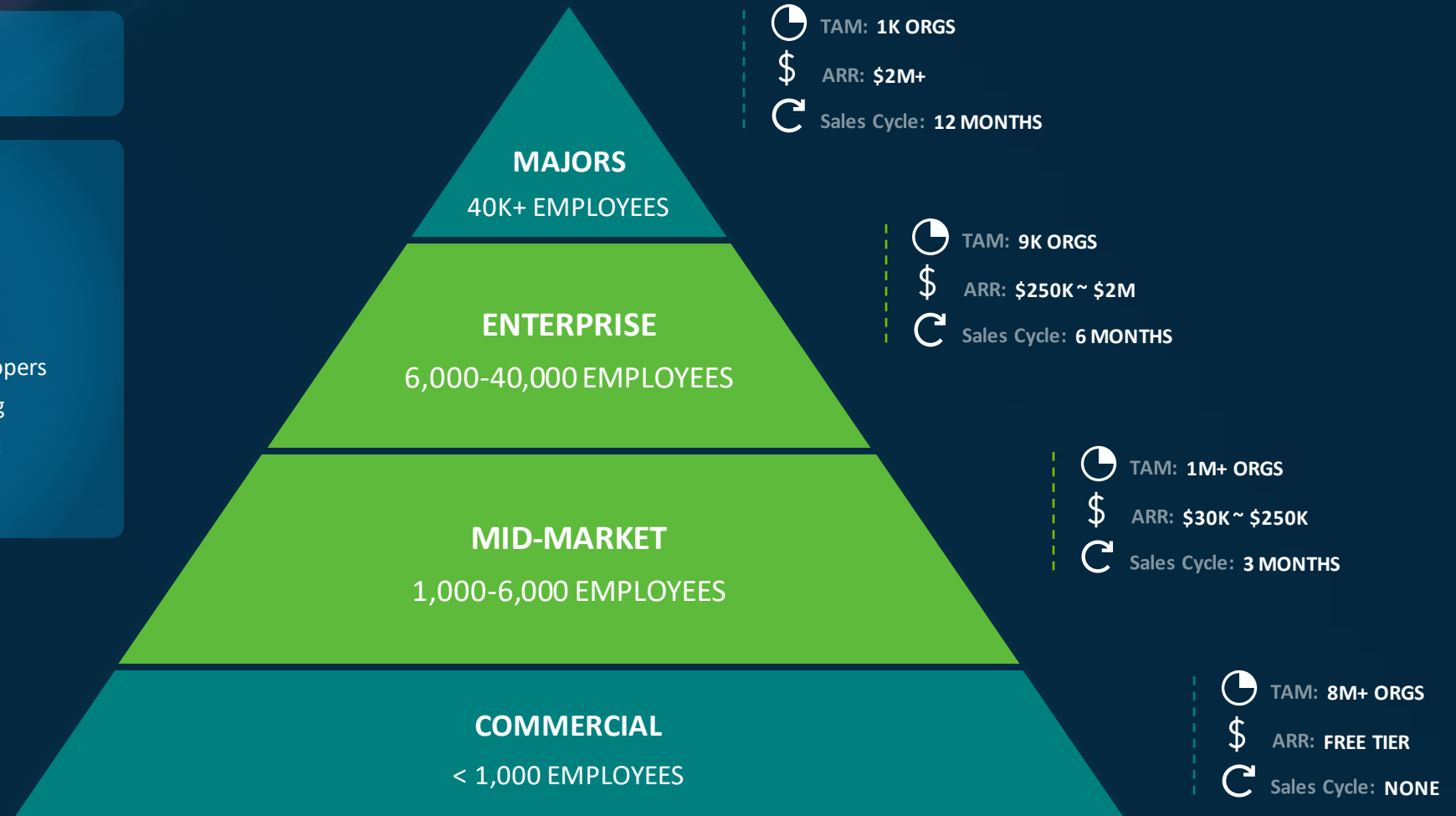
# APPLICATION ORCHESTRATION GTM

WINNING IN THE ENTERPRISE & MID-MARKET

## Target Account-Based Sales

### Lifecycle Engagement Model

- Thought Leadership
- ABM Demand Generation
- Demo and Business Value
- Self-Service adoption for Developers
- Rapid, Low Friction On-Boarding
- Customer Success Management
- Up-Sell



# HIGH VELOCITY GROWTH MODEL

## CONTENT DELIVERY

Building on historic base  
of 110%+ DBNR

## APPLICATION ORCHESTRATION

Revenue run rate of  
\$20M

Increase sales force 2x over the next 3 quarters  
Combined sales team selling entire solution suite, in all GEOs  
Upsell/cross sell opportunities at all existing Accounts  
Powerful Analytics accelerate target account profiling & selling  
Significant new logo growth



04

## A LOOK AHEAD

BOB LYONS, CEO

# TRANSFORMING TO A SOFTWARE MODEL

## LIMELIGHT 1.0

- Video delivery / Software download
- Usage-based revenue
- Concentrated customer base
- Low network utilization
- Low gross margins

## LIMELIGHT 2.0

- Edge enabled solutions
- + Recurring revenue
- Broad customer base
- Improved network utilization
- Improved gross margins
- Execution oriented company

# IMPROVING GROWTH AND PROFITABILITY



## GROWTH DRIVERS

- 4x increase in TAM
- 3x increase in TAM CAGR
- Application orchestration
- High velocity marketing & sales
- Rapidly growing pipeline



## PROFITABILITY DRIVERS

- \$30M in cost reductions
- High margin offers (Applications)
- Increased network utilization
- Reduced capex via ISP partner strategy
- Platform oriented R&D

# DISRUPTIVE PLATFORM COMBINATION

SYNERGISTIC OPPORTUNITY FOR VALUE CREATION

## CONTENT DELIVERY

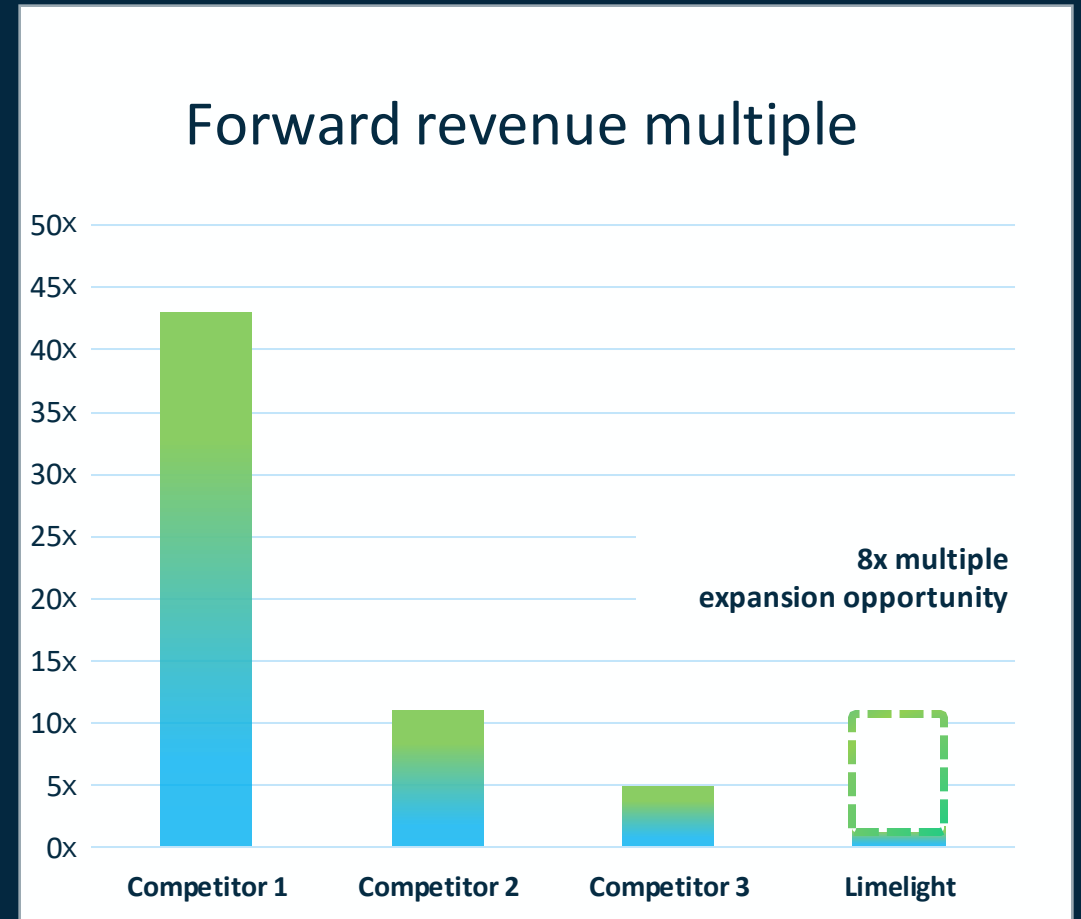
- \$200M+ in TTM Revenue
- 110%+ DBNR
- 18 of top 20 customers growing 20%
- Network performance improving
- \$30M in cost reductions
- Capex at 10% of revenue

## APPLICATION ORCHESTRATION

- \$20M revenue run rate
- Deferred and recurring revenue
- 100%+ DBNR
- Industry growth at 24%
- High margin (70%+) growth
- Low capex intensity

# INVESTMENT HIGHLIGHTS

- Leading solution in large and growing markets with multiple secular tailwinds
- LT plan supporting the acceleration of recurring revenue growth
- Disruptive product/technology roadmap and revitalized GTM driving sustainable expansion
- Improvements in unit economics and operating model provide clear path to FCF generation
- Strong balance sheet to support growth investments







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Q&A

# APPENDIX

## MARKET RESEARCH SOURCES

IDC Worldwide Content Delivery Network Forecast, 2020–2025 (2021)

Gartner Forecast Analysis: CDN and Edge Services, Worldwide (June 2020)

IDC DevOps SW Tools 2020–2024 (July 2020)

Gartner Magic Quadrant for Application Performance Monitoring 2021

Gartner Forecasts Public Cloud (2021)

DevOps Market Opportunity Analysis and Industry Forecast, 2020–2027 (Research Dive Nov 2020),

RiskIQ Mobile App Threat Landscape Report (2020)

Additional data from CBInsights, Veritis, Builtwith, and public investor presentations for JFrog & Splunk

# TODAY'S SPEAKERS



**Bob Lyons**, CEO

- Extensive experience building and executing value creation strategies in both public and PE backed venues
- Most recently was CEO of Alert Logic where he led the company through a multi-year strategic reposition that resulted in becoming a global leader in cybersecurity
- RPI Master's in Business and Technology and Bachelor's degree in Management with Comp Sci concentration



**Ajay Kapur**, Incoming CTO

- Co-founder and CEO, Layer0, a leading developer-focused platform-as-a-service for application orchestration
- Founder of one of the first and most popular mobile app publishers for iOS and Android
- Goldman Sachs' private equity
- Stanford MBA; Bachelor's degrees in Physics and Computer Science from UC Berkeley



**Eric Armstrong**, Senior Vice President of Growth

- More than 20 years of sales leadership in a variety of high growth technology companies covering cloud-based infrastructure, SaaS, networking and video solutions
- Prior to joining Limelight, held sales and executive positions at Harmonic, Zscaler, VeriSign and Kontiki
- Master of Science in Computer Engineering from Santa Clara University and Bachelor of Science in Computer Science