

SOFTWARE VENDORS ARE LOSING REVENUE DUE TO RIGID LICENSING AND DELIVERY OPTIONS

ISVs CAN'T MEET EXPECTATIONS

83% of enterprise respondents said that flexible software packaging and accessibility across multiple devices are extremely important to them



Almost half of ISV respondents admit that they find it difficult to be flexible with their software licensing and to support their software on multiple devices



ISVs FACE SOFTWARE MONETIZATION CHALLENGES

Only one in ten ISVs intelligent device manufacturers don't have any licensing operations challenges



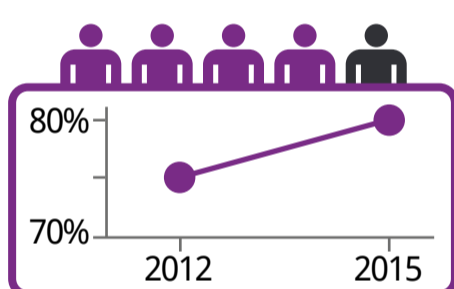
Top back office issues included:

87% Cost of renewing and managing licenses

83% Time spent renewing and managing licenses

82% Time and cost spent on non-product related development

68% Limited visibility into how products are being used



Four-fifths of ISV respondents worry about unlicensed software use, up from about three-quarters in 2012



48%

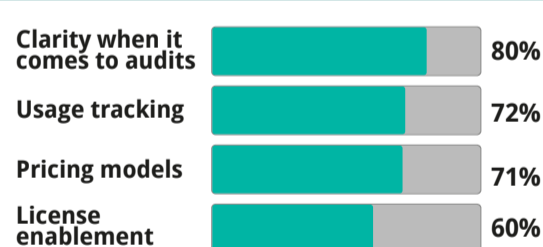
Almost half of enterprise respondents admit to being non-compliant with a software agreement



LICENSING COMPLIANCE REMAINS A CONCERN

ENTERPRISE SOFTWARE USERS ARE FRUSTRATED

Software vendors could improve their service for the following:



Nine out of ten enterprises experience challenges with their software licenses



Of the enterprise users who had implemented a commercial software monetization solution, two-thirds were up and running in **less than six months**.



COMMERCIAL SOFTWARE MONETIZATION SOLUTIONS ARE WORTH IMPLEMENTING

Access to the detailed global and regional findings:
www5.safenet-inc.com/software-monetization-trends-lp

Additional information about Gemalto's software monetization solutions:
www.gemalto.com/software-monetization