

| Section | Slide Number |
|---|--------------|
| Executive Summary | 8 |
| Market Overview | o |
| Drivers and Restraints - Total IPPN Market | 11 |
| Forecasts and Trends - Total IPPN Market | 26 |
| Forecasts and Trends - NALA | 35 |
| Forecasts and Trends – EMEA | 38 |
| Forecasts and Trends – APAC | 41 |
| Market Share and Competitive Analysis - Verticals | 44 |
| Market Share and Competitive Analysis - Total IPPN Market | 47 |
| Growth Opportunities and Companies to Action | 62 |
| The Last Word | 89 |
| Appendix | 71 |

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The Data Company Technologies Inc. v. Bright Data Ltd. IPR2022-00135, EX. 2025 2 of 74

The Data Company Technologies Inc. v. Bright Data Ltd. IPR2022-00138, EX. 2025

2



Key Findings

- Websites increasingly change their displayed information based on user IP address, location, and Companies not familiar with these website practices or Internet Protocol proxy network (IPPN) comparisons, and data extraction as a simulated user to capture this customized information. demographic attributes. This creates a need for companies to do competitor analysis, price solutions are at risk of gathering incorrect data and left behind technology-wise.
- million, the Service Available Market (SAM) to be \$358.9 million, and the Service Obtainable Market SOM) to be \$76.3 million. \$76.3 million is the combined revenue from market participants in 2018. Frost & Sullivan estimates the Total Addressable Market (TAM) for IPPNs in 2018 to be \$951.0 This IPPN market is forecasted to grow at a CAGR of 16.8% and reach \$259.7 million by 2025.
- proxy networks, and mobile IP proxy networks. Use cases include: price comparison, ad verification, This global IPPN market study includes revenues from residential IP proxy networks, data center IP data collection, fraud protection, application performance, brand protection, talent sourcing, cyber security, and account management.
- EMEA makes up 39.5% of revenues for the IPPN market in 2018, followed by NALA at 35.4%, and APAC at 27.7%. By 2025, NALA's 37.9% market share overtakes EMEA's 34.4% of IPPN market. presences, APAC has fastest overall CAGR at 18.7% growing to a 27.7% market share by 2025. Thanks to demographic trends and an increasing number of its residents developing online
- GeoSurf, make up 77.0% of the global IPPN market in 2018 with significant potential to grow as Market leader Luminati, which practically invented the category, and competitors Oxylabs and PPN solutions become more well-known.

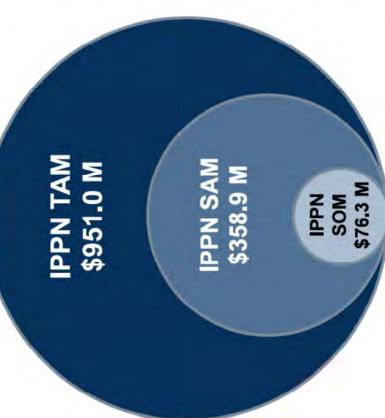
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The Data Company Technologies Inc. v. Bright Data Ltd. IPR2022-00138, EX. 2025 4 of 74

4

Total IPPN Market: TAM, SAM, and SOM, Global, 2018



IPPN Total Addressable Market (TAM)

Number of companies, globally, applicable to market use cases multiplied by average selling price (ASP).

IPPN Service Available Market (SAM)

In-House IPPN Use based on data center IP address allocation combined with revenue from dedicated solution providers.

IPPN Service Obtainable Market (SOM)

Revenue from dedicated IPPN solution providers, such as Luminati, Oxylabs, and GeoSurf.

Source: Frost & Sullivan

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2

The Data Company Technologies Inc. v. Bright Data Ltd. IPR2022-00135, EX. 2025 5 of 74

The Data Company Technologies Inc. v. Bright Data Ltd. IPR2022-00138, EX. 2025 5 of 74

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