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Polycom, Inc Q4 2008 Earnings Call Transcript

Question-and-Answer Session

Operator

Yes, thank you. (Operator Instructions). And our first question comes from the line of Jason Ader with William Blair & Company. Please proceed with your question.

Jason Ader – William Blair & Company

Thank you. Hey, guys. Wanted to ask just a few questions about - some granularity on the guidance, in particular, from a segment perspective, do you expect the video and voice business to be down about the same sequentially or is one going to be hit harder than the other? I know in Q4 obviously voice was down a lot - a lot more significantly?

Michael R. Kourey

I think going forward in Q1 here we would expect that voice would decline by more than video.

Jason Ader – William Blair & Company

Okay, on a percentage basis?

Michael R. Kourey

That's correct.

Jason Ader – William Blair & Company

All right, okay. And then from a geographic perspective, EMEA seemed like it has held up pretty well. What's the outlook for EMEA in Q1 and beyond? I think there's some fear that we sort – I think shoot at drop as EMEA at some point for – for tech companies. What – what's your, what commentary can you provide on EMEA right now?

Michael R. Kourey

I'll start and then Bob if you like to add it to that I think that, the outlook for EMEA is reasonable. I think there are couple drivers there, one is, they have been very strong adopters of Telepresence and video more broadly, driven by the cost element that's travel savings and opportunity cost associated with travel, but also they do have at – at this point frankly a keener focus on some of the green initiatives, from a just pure geographic standpoint and some of the mandates over there. So I think we look forward here in the Q1 we expect that they might also do better than average for the company.

Robert C. Hagerty

Yeah, I would reiterate that, I think particular weakness in the UK they've got a lot currency fluctuations, but strength other places. I mean, I think there is – there is a lot of focus on – on green and there are globalized businesses there that are continuing to expand into Asia for example. So, we are seeing some – some good worldwide demand being sourced originally and in Europe and expanding, and of course the Middle East even with the all the client continues to expand economically, so that's – that is of course in our – our European number as well.

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