

NEWS AND VIEWS ON REAL-TIME UNIFIED COMMUNICATIONS

We are heading for Berlin and parts East. Next WR Bulletin probably not for a couple of weeks.

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News in Brief

- Two interesting “non-announcements” leaked out of San Jose this week in the area of telepresence. 1) Cisco has increased the capacity of the Cisco Telepresence Multipoint Switch (CTMS) from 36 to 48 segments. CTMS is the device that provides for VAS segment (screen) switching or VAS site switching. The device can handle as many different meetings on a single platform as allowed by the “ports.” So a 48 “port” switch could handle a single 48 segment multipoint meeting, or twelve 4-segment meetings, etc. 2) The one-button-to-push user interface to launch a Cisco telepresence meeting via the IP phone has been linked to Microsoft Outlook. Now Cisco has extended this interface capability to Lotus Notes as well. Our CIA-trained spies located in Northern California inform us that several astonishing announcements will be coming out of San Jose before the winter snow melts in Oslo.
- Mirial released a new version of its Mirial Softphone for professional video conferencing. Besides the support for both SD and HD 720p video resolution, which has been available since June 2007, the new V6.0 introduces H.239, call management, and embedded MCU functionalities. Mirial Softphone users can now set up 3-party video conferencing sessions and transfer or hold active video calls without any external MCU or H323-to-SIP gateway. In addition, all video conferencing sessions can be recorded and exported to a WMV file.
- Tandberg released TMS V11.9 with two interesting new features. One is automatic upgrades for endpoints and infrastructure products. IF a TMS customer has valid maintenance contracts in place and IF the TMS server has Internet access, THEN TMS will access back-end servers at Tandberg, check to see that the valid contracts are in place and auto-download the software and auto-generate release keys. TMS will NOT automatically install the new software. The second enhancement is support for Codian MCUs (no surprise here) and support for Polycom HDX high definition video endpoints. As is the case for all non-Tandberg endpoints, TMS supports the hardware to the extent allowed by APIs. According to Tandberg, TMS support for the HDX product line is equivalent to what the company has offered for Polycom’s VSX systems.

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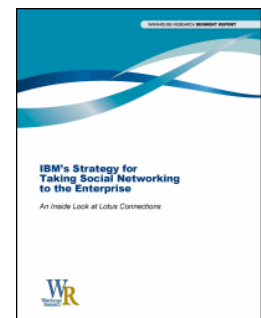
- Revolabs announced Fusion, an all-in-one wireless microphone system designed for small conference rooms. The new product combines all of the necessary electronics in one package so that the set-up and use of multiple Revolabs wireless microphones is extremely simple.
- Dimension Data announced their Unified Communications Development Model (UCDM) that helps organizations assess their competence and capabilities in the area of unified communications and to develop a roadmap for implementation.

- Audio conferencing services provider Vapps announced that the company has been selected by AutoZone to provide audio conferencing services for more than 4,000 retail AutoZone locations.
- An interesting report has been published by [KPMG](#) claims six industry sectors should be especially on alert over climate change risks and that all business sectors under-estimate the full extent of climate change risk. The six major industry sectors are aviation, healthcare, tourism, transport, oil and gas, and financial services. These industries score high on the risks which face them yet low in terms of their preparedness to face these risks. In addition, KPMG claims that the 18 sectors included in the report – even the three deemed to be in the “safe area” – are not sufficiently prepared to deal with the new risks associated with climate change. While the oil and gas sector is far better prepared than any of the other sectors in the ‘danger zone’, the climate change issues it faces make it the riskiest of all the 18 sectors. By contrast, transport is a far less risky sector but its level of preparedness is the worst of all the 18.
- Collanos has released Workplace V1.3, a peer-to-peer solution for asynchronous collaboration.
- Acacia Research, a company that acquires patents and licenses technology, announced that it has acquired rights to a patent relating to videoconferencing technology.
- Telanetix reported Q4-07 revenue of \$7.4M and full year 2007 revenue of \$12.2M consisting of \$4.9M in telepresence sales and \$7.3M in VoIP sales. Other details await the firm’s filings with the SEC.
- Glowpoint reported Q4-07 revenue of \$5.5 M and revenue of \$22.8M for the year. The loss from operations improved 45.7%, to \$4.6 million in the 2007 year from \$8.5 million in the 2006 year. The company recently signed a three-year agreement with Polycom to use Glowpoint as an underlying provider for a branded, managed service offering for telepresence.
- Q4-07 Ezenia reported Q4-07 revenue of \$1.8M, a 39% decrease from Q4-06. For the year, the company reported revenue of \$9.0M, a 32% decrease from the year 2006.
- WebEx has expanded its support for the Macintosh. Cisco claims that Mac use has doubled in the past year. Some credit for this must go to Vista we would hazard to guess.
- We have a new report available covering a new market area by our newest analyst, David Dines. As part of Wainhouse Research’s emerging coverage of the enterprise social networking (ESN) industry and market, we are conducting in-depth research of selected suppliers. Our first supplier-focused study (\$995), [IBM’s Strategy for Taking Social Networking to the Enterprise](#), examines IBM’s Lotus Connections platform. We were intrigued and impressed by IBM because it was the first major software supplier to recognize the value of ESN and deliver a platform to address this market. Contact sfargo@wainhouse.com for more information
- Avistar, which recently refocused much of the company around C3, Avistar’s single-click desktop videoconferencing and collaboration experience with patented bandwidth management and a new software MCU capability, published a rather odd press release (in our humble opinion) that the company was reducing its US and European workforce by 25% as a cost cutting measure prompted by Microsoft’s recent challenge to all 29 of Avistar’s US patents. The company is also

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dropping plans to initiate a China-based development program, an action that accounts for some of the 25% headcount reduction. According to Avistar, these patents have already been examined over a large body of prior art and have successfully withstood two litigations. Our policy at WR has been to refrain from making any comments on any law suits and patent law suits in particular, but this one certainly has an unusual color to it. This is a seriously aggressive action on the part of Microsoft and, according to Avistar, the action has put on hold some of the other discussions the company was having with other possible licensees. While Avistar recently won back its NASDAQ listing and while the company is hopeful it will still come to licensing terms with the Redmond Giant, you have to believe that a waiting game won't favor the small guy in this showdown.

See You Next Week in Berlin

This year's Berlin Summit features a wide variety of speakers on topics ranging from videoconferencing and telepresence to conferencing services, collaboration over mobile networks, the coming age of enterprise social networks for information workers, telemedicine, education and the future of unified communications.

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We have 8 workshops and several hours of exhibits/demos from 17 suppliers. This is a great networking opportunity for anyone in the collaboration industry. The Summit brings together the top enterprise conferencing managers, videoconferencing professionals, meeting facilitators, and IT/network decision-makers with the industry's leading innovators, service providers, and experts. Visit www.wainhouse.com/berlin08 for the complete story. A mini-agenda is included at the back of this newsletter.

One on One with Radvision Ex-President Eli Doron

As many of you are undoubtedly aware, Eli Doron, Radvision President, chief strategy officer, and co-founder, recently announced his resignation. I caught up with Eli via videoconference on his last day at Radvision.

WRB: Thanks for taking this call. Can you tell us why you are leaving Radvision, and why now. Has there been an internal disagreement.

ED: Not at all. Any reports about internal strife are false. I've been here for over 15 years, and I'm now 56 years old, and its time for a new adventure for me. If I waited longer, I'm afraid I wouldn't be able to try something new. I am not retiring; I'm too young for that. In fact, I have enjoyed this experience so much I might do something related to video in my next venture. Nothing is yet settled.

WRB: Why did you start Radvision in the first place. What was it like way back in 1992.

ED: Things were very very different. The ITU, which back then was known as the CCITT, had just passed H.320, the standard for videoconferencing over ISDN. We believed that having a standard, rather than multiple proprietary protocols, would open up huge opportunities not only for industry growth, but also for an independent infrastructure company. At the time, PictureTel and CLI were dominant in the room endpoint industry, and we thought that desktop video would



not be far behind. However, we really didn't think people would take ISDN to the desktop even though there were several vendors around like Zydacron, some Finnish vendors, and later Intel that were making ISDN-based desktop videoconferencing products. Radvision's early focus was on a little gateway device that interfaced the LAN to ISDN so that people would be able to attach ISDN-based video systems to their LAN. The protocol we developed for the LAN side eventually became H.323.

WRB: How would you describe Radvision today. The competitive landscape has certainly changed in the past year or two.

ED: I think Radvision is the only company that is really focused on a complete infrastructure solution. The other companies, when you think about it, are really focused on endpoints. We also do NOT have a legacy of ISDN technology but have been concentrating since day one on the LAN and IP networks. This thinking really permeates our architecture decisions and our focus on infrastructure solutions for today's advanced IP networks such as distributed resources, security, service preservation, remote connectivity and scalability.

WRB: It seems to me, that ever since 1994 or 1995, desktop videoconferencing (DVC) has been about to go mainstream. But it never has. Do you think its time has come?

ED: Well, DVC is still of great interest, but I don't think we will see true large scale deployments for another two years. In the interim you will see a lot of desktop trials within the enterprise. I also think we will see continued success with the executive systems, dedicated hardware that provides a much richer desktop experience. This is a cultural issue more than a technology issue, although the ergonomics of the executive systems is generally superior to that of the personal computer-based. So we will have room systems, executive systems, mobile devices and PC-based DVC all in the market for some time and this is where Radvision's SCOPIA MCU and SCOPIA Desktop solution plays – providing interoperability for all of them and delivering to each type of system the optimum experience.

WRB: What about unified communications and IP telephony. What about the Microsoft, IBM, Cisco, Avaya, Nortel, Siemens companies and others in this space. Do you think they will make DVC happen.

ED: Yes. Now that the big players are in the market seriously, DVC will happen. Again, it's a question of when but ultimately they will succeed. And I think the UC and IP telephony strategies will all converge over the next 2-3 years. The result will be video becoming almost free, and like email, a must have feature/function.

WRB: A recent opinion piece attributed to Forbes suggested that Radvision is moving away from Cisco. Is that true?



ED: Actually quite the contrary. The Radvision/Cisco relationship is very good and in fact is broadening. We are working with multiple groups inside Cisco on multiple projects. Cisco continues to integrate our technology into different areas of their business beyond traditional videoconferencing and IP videotelephony. Recently you've seen an expansion of Radvision technology into their telepresence and contact center lines of business. While we will continue to work with our other partners as well and look for areas where we can expand our market we also look forward to a mutually beneficial relationship with Cisco for a long time to come.

WRB: Any final words:

ED: I have really enjoyed being a part of this industry and watching it grow from a niche market into the mainstream it is today. I have great confidence that we are finally seeing video become an integral part of everyday communications. I wish everyone in the industry well.



Selecting Your Conferencing Managed Service Provider

Logan Airport Hilton, Boston 6-7 May 2007

2007 was a landmark year for the independent, end-user peer-networking group – Point Nine (P9). We are building on this success to make this two-day meeting, focused on Collaboration Managed Services (cMSP), our most powerful and hard-hitting to date. In addition to the standard round-table discussions, WR presentations and user case studies, we are adding a second day that will offer participants a unique opportunity to evaluate four leading managed services providers (three have signed up already). Wainhouse Research has compiled a list of eleven questions that explore key aspects of MSP services and solutions and has sent this to MSP vendors who will be presenting their responses. Participants will have the opportunity to score each vendor against his own weighting system

If you are an end-user responsible for conferencing in your organisation then come to this meeting and.....

- Learn from two F100 organizations the reasons why they turned to managed services and how these are working in practice
- Hear WR's perspective on what's happening in the Managed Services sector
- Get key tips on how to build a successful RFP and evaluate vendors
- Discuss your ideas with your peers and WR analysts in an independent forum

This meeting, open to end-users only, will be held in Boston - but to make this event as accessible as possible and to reduce travel requirements, we are attempting to secure video sites in NYC and Washington DC to bring in additional participants. *Watch this space for further information!*

For further details, including the provisional agenda and how to register, please visit www.wainhouse.com/point9 or contact P9's Executive Director, [Richard Norris](#).

One on One with Aethra's Elena Viezzoli



We were tipped off recently by one of our spies in South America that Aethra would be introducing a new videoconferencing system at our Collaboration Summit next week in Berlin. I took the opportunity to put Elena Viezzoli, one of the VPs at the Italian company, on the spot.

WRB: Is it true what I heard... are you introducing a new system in Berlin next week.

EV: Yes, but I can't tell you much right now. I don't want to spoil the surprise. The new system is part of Aethra's moving to a new corporate identity and brand image to a radical and distinctive position based on a new company philosophy.

WRB: So, what's the major point you are trying to make.

EV: We have passed the point where the technology is good enough for business applications.

We've been doing the "technology thing" for 35 years. Our new vision of videoconferencing is therefore "beyond technology." We are focused on two elements. One is making videoconferencing more attractive, more in tune with high end conference room designs. Italian design, as even you probably know, is world renowned. Design is revolutionizing the videoconferencing industry and creating a new emotional experience that transcends the traditional paradigm of legacy equipment. The new Aethra philosophy involves elegance,



attention to detail, and Italian designer styling.

WRB: Ok, I get design elegance. What is the second element?

EV: We want to make the technology more accessible. This involves both ease-of-use and customer care. We think our new vision will distinguish our systems in the market. For example, you've seen our latest videophone, the Maia XC, the only system on the market to offer its features and characteristics, and our selection of services with Meetin Rich Media, which we are able to offer thanks to expertise we have developed over 12 years.

WRB: Does your new system have a name and a price?

EV: Yes, but you'll have to wait till next week. Or [come to our workshop](#) at the WR Collaboration Summit for more details.

WRB: Well, at least give us some details.

EV: We will announce our new, exciting product. A new, high-styled High Definition Rollabout for Telepresence. It is a complete system, a unique solution that combines HD technology with an elegant and stylish design by one of the most important Italian designers, Michele De Lucchi.



Our new system is a “must have” top-end system driving the evolution of videoconferencing towards a glamorous life-style concept. It will be shown for the first time ever in Berlin, it will be revealed during our workshop.

If I can add one other note about our workshop. Your readers should also be aware that during our workshop, on Tuesday 8 April there will be a drawing for a silver Maia XC – our new videophone designed by Paolo Villa – in which all members of the workshop audience can participate! We want to take the opportunity to do something different, something “Thinking Beyond Technology”, reflecting the title of our workshop. The protagonist of our workshop, however, will be our new rollabout. For this reason we would like to invite as many people as possible to attend our workshop, where all the details of our new product will be revealed.

Conferencing & Collaboration Event Calendar	
WHEN & WHERE	WHAT & WHO
8-10 April; Berlin, Germany	Wainhouse Research Collaboration Summit - Berlin
May 6-7, Boston, MA + more	Point Nine meeting on Collaboration Managed Services
16-18 July; Boston, MA	Wainhouse Research Collaboration Summit – Boston
27 October, Boston, MA	Wainhouse Research CSP Summit

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Summary of Berlin Collaboration Summit Presentations

	8 April-2008	Presenter
9:00 AM	Welcome	Andrew Davis / WR
9:10 AM	Visual communications: Turning today's hype into tomorrow's reality	Andrew Davis
9:50 AM	Videoconferencing and the World of Professional AV	Peter Lloyd / AV Magazine
11:00 AM	From Collaboration to Telepresence	John-Erik Horn / Media-Saturn
11:30 AM	Experiences with Qimonda's Near Telepresence Video Systems	Robert Mayer-Klamm / Qimonda
12:00 PM	Workshop: Thinking beyond technology. Sponsored by Aethra	
12:00 PM	Workshop: Accelerating Business through Web 2.0 Sponsored by WebEx	
2:00 PM	Workshop: Mobile audio and video conferencing . Sponsored by disy	
2:00 PM	Workshop: Business Transformation: Sponsored by Cisco	
3:00 PM	Network Design for Telepresence	John Bartlett / Netforecast
3:30 PM	Panel: the future of video and visual communications	
4:15 PM	Exhibits open / refreshments / networking	
7:30 PM	Point Nine Dinner	
	9 April-2008	
9:15 AM	Conferencing Services: Is this a new Peak, the Plateau, or just the Beginning?	Marc Beattie / WR
9:45 AM	Professional and Standards Videoconferencing: Using the Internet for an Outsourced Service	Ernest Companys / Techno Trends
10:45 AM	Applications and Services Driving the Video Industry	Ray Alves / VisionsConnected
11:15 AM	Video Services over 3G networks	Borja Pascual / Cestel
11:45 AM	Workshop: Putting UC into Context. Sponsored by Compunetix	
11:45 AM	Workshop: Delivering the Premium User Experience Sponsored by Polycom	
1:45 PM	Workshop: Delivering new experiences with UC Sponsored by Microsoft	
1:45 PM	Workshop: Desktop HD and next-gen conferencing: Sponsored by Emblaze-VCON	
2:45 PM	Enterprise Social Networking	David Dines / WR
3:15 PM	Panel discussion: the future of collaboration services	
4:00 PM	Exhibits open / refreshments	
7:30 PM	Banquet co-sponsored by MVC and Microsoft	
	10 April-2008	
9:00 AM	Welcome	Andrew Davis / WR
9:15 AM	The Challenge of Implementing UC	Jon Neville / WR
9:45 AM	Real-time Collaboration in the Global Enterprise: Security in the New Age	Rolf Hansman / Sanofi Aventis
10:45 AM	Rich Media Communications and Telemedicine Reality	Adrian Hall / Brandon Medical
11:15 AM	The Wisdom of Crowds: Computer-aided listening	Joanne Celens / Synthetron
12:45 PM	Visual Communications: how tomorrow's applications will differ from today's	Stefan Karapetkov / Polycom
1:15 PM	From education to mobile workers: Opportunities for new products and services	Alan Greenberg / WR
1:45 PM	Panel discussion: When and how will UC take off?	
	Adjourn	

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