

As always, please feel free to forward this newsletter to your colleagues. To be added to our **FREE** automated email distribution list, simply visit [www.wainhouse.com/bulletin](http://www.wainhouse.com/bulletin).

Andrew W. Davis, [andrewwd@wainhouse.com](mailto:andrewwd@wainhouse.com)

### Polycom Debuts Second Gen HD Systems

At last week's annual PUG conference, Polycom unveiled its second generation of HD-capable video systems with the headline feature being support for 1080p (at 3 Mbps) and 720p-60. The new capabilities impact the company's RPX and TPX multi-codec telepresence product lines as well as the RMX 2000 MCU. A new stand-alone video system, the HDX 8006 brings these new capabilities into the price realm of normal medium-to-large conference room deployments. The new codec systems also feature the ability to simultaneously share multimedia content (H.239) in HD (720p/60 and 720p/30) and Polycom's patented Lost Packet Recovery technology that helps ensure a consistent, exceptional HD experience over IP networks.

The company also announced that it will offer programs for qualified RMX 2000 and HDX customers wanting to upgrade their systems to support 1080p and 720p 60fps. While the HDX8006 bears a model number and physical appearance similar to the HDX8000, we have been told that the new system is based on all new hardware. The camera is obviously new in order to support 1080p and we believe all the I/O connections on the codec will also support 1080p. An embedded 4-way MCU supports 720p with continuous presence. The 8000 series lineup and MSRPS now include the HDX 8006 (\$17,499, \$19,499 with People + Content and People on Content, and \$22,099 with the 4-way HDCP bridge), the HDX 8004 (\$14,499), the HDX 8002 (\$11,399); the entry-level HDX7002 starts at \$9799. Replacing the microphone array with the HDX 8006 with a SoundStation IP 7000 speakerphone adds \$1,339 to the list price.

Other Polycom news includes GA of the first phase of the Microsoft OCS integration and CMA integration into the HDX 2.5 software as well as an expanded ARENA program

*Here's What I Think:* 1080p is nice, and probably has visible benefit when you get to really large displays, but most enterprises will move to 720p in either 30 or 60 frames/second mode based on bandwidth concerns. Hence, I think the real benefit of these very powerful codec systems is their ability to produce high quality video (and audio) and bandwidths most of us can afford. Of course, this raises the question, what about 4CIF video at 384 kbps – wouldn't that be nice. Polycom clearly needs a 1080p system if only to keep up with the Jones (Tandberg, Cisco, LifeSize) and to avoid being left out of the "checkware" game. HD is here to stay and Polycom's lineup is broad and deep and high quality; but bandwidth is on the minds of most enterprises we talk to. That's why the horsepower of these new systems makes for a smart buy.

⇒ [WR Forum: Polycom Debuts Second Gen HD Systems](#)



## New OCS from those Guys in Redmond

Brent Kelly, [bkelly@wainhouse.com](mailto:bkelly@wainhouse.com)

Microsoft announced Office Communications Server 2007 Release 2 (OCS R2) at VoiceCon Europe on October 14. This release is packed with a number of new features OCS needed in order to become a serious contender for use as an enterprise voice solution. OCS R2 delivers voice enhancements, improved conferencing capabilities, and open APIs to make embedding communications into line of business applications much easier. The new release will be available in February 2009. Here is a summary of these new capabilities. For a more detailed review and analysis, see [WR's research note on OCS 2007 R2](#) found on our WR Platinum web site.



### Enterprise Voice Enhancements

1. Mobile UC – Microsoft has extended Communicator Mobile (the mobile phone version of the Communicator client) to include JME devices including Nokia S40 and Motorola RAZR devices.
2. Single Number Reach/Single Voice Mailbox – People can now give out a single enterprise phone number. OCS can now ring both a Communicator PC client and the Mobile Communicator client. Mobile Communicator users can launch a click-to-call phone call using the Mobile Communicator interface. OCS dials the mobile phone and then dials out to the other party.
3. Attendant Console – A new attendant console has been created allowing administrative assistants and front-desk receptionists to manage conversations and route calls.
4. Response Groups – Individuals and teams can set up a response group which allows a team member or colleague to answer an inbound phone call. This works like a hunt group, and it supports IVR, speech recognition, and text-to-speech.
5. New Devices – OCS R2 still supports three types of devices, IP phones running Communicator (the Tanjay style phones), USB phones, and USB headsets. New software gives these devices lower latency; the mechanical components have been “tightened up” to give better audio quality.
6. Delegation – Delegation allows administrative assistants to place and receive calls, initiate and join conferences, and quickly transfer calls on behalf of an executive.
7. Call Logs and Quality Monitoring – IT administrators can maintain logs of user calls.
8. SIP Trunking – Microsoft promised SIP trunking when OCS was first released.
9. Enhanced Presence States – Response groups have their own icon and the aggregated presence of the group can show up on the Communicator contact list.

### Conferencing and Collaboration

10. Cross Platform Desktop Sharing – This is a new “see what I see”
11. Dial-in Conferencing – including support for PSTN participants.
12. HD Video – At VoiceCon Fall, Microsoft announced that it had created its own HD camera. Now, OCS supports HD video at 1280x720 resolution. It also supports CIF and VGA resolutions.
13. Persistent Chat – Some months ago, Microsoft acquired Parlano for the company’s persistent chat capability. Persistent chat is now available in OCS R2.

### Communications Enabled Business Processes

14. Open APIs – Two APIs are available: on the OCS server side it is called Unified Communications Managed API (UCMA) and on the Communicator client side it is called Unified Communications Client API (UCCA).
15. Workflow Tools – Third parties can now create unified communications enabled business workflow applications using familiar development tools. Visual Studio 2008 integration has been enabled and an SDK exists for developing speech applications.

## **Hardware/Software**

16. 64 Bit OS – OCS 2007 R2 will require 64 bit CPU hardware. Consequently, anyone running OCS today on 32-bit servers will need to upgrade to 64 bit servers and 64 bit version of Windows 2008 server.

### *Here's What Brent Thinks*

Microsoft has made great strides in OCS R2 to address critical functionality in both the enterprise voice and the conferencing/collaboration capabilities it offers. There are a few capabilities the product still lacks, like remote survivability, E-911, support for analog devices (fax machines, analog phones, etc.), and PSTN failover. These are slated for release in a subsequent version in 2010.

While the telephony vendors will argue that OCS is still not ready for prime time as far as a PBX replacement goes, the length of the typical sales cycle puts OCS R2 and then R3 right there as a candidate when a company is ready to buy. We anticipate that OCS R2 will not affect Cisco too much immediately, but we do expect that other vendors will see some impact on sales, both from a volume perspective and from a lengthened sales cycle view. When OCS R3 hits in 2010, I believe more companies will look at OCS as a true replacement for the PBX. IBM is likely going to have to counter by opening up more of the telephony capabilities in Sametime Unified Telephony still slated for release later this year.

OCS 2007 R2 is a compelling product. Some will say that other products have had certain capabilities like persistent chat and instant sharing for a while now. While true, the marketing muscle Microsoft is exerting will cause even more companies to seriously look at OCS as its platform for UC, and going forward, as a serious contender for voice communications.

## **News in Brief**

- In the UC space, IBM has extended its most widely used software, Lotus Notes, to new markets through delivery as a hosted service dubbed Lotus Notes Hosted Messaging. Lotus has led IBM into the nascent cloud services market with offerings such as Sametime Unyte Web conferencing software and IBM's "Bluehouse" extranet collaboration service (now in beta and FREE for a while). IBM is extending its cloud services strategy to its flagship Lotus Notes franchise to attract new customers including more retail, global manufacturing and insurance companies. Lotus Notes Hosted Messaging can be customized to the needs of each company by an IBM services team. The service starts at about \$10 per user per month.
- Global Crossing has updated its video bridging service to include support for HD videoconferencing systems. The company, once a leader in hosted video bridging services, is making a comeback. Our conversations with Global's briefing people have led us to believe that about half the company's business is still ISDN-based, that ISDN is still growing for them; that only 5-10% of the systems they support are HD-capable, and that their plans include adding several features to the video services menu in early Q1. Stay tuned.
- Persony, Inc., a provider of branded private label web and video conferencing solutions, announced the addition of a cross-platform and no-download desktop sharing feature to its Web Conferencing 2.0 product. The new feature allows a presenter to share the entire desktop with all meeting participants in real time from a Windows, Macintosh, or Linux computer without installing any proprietary or special software. The new feature works with most web browsers, including Internet Explorer, Firefox, Safari, and Google Chrome. Persony Web Conferencing 2.0 (WC2) is a Flash-based audio, video, and web conference solution. Most features in WC2, such as presentation sharing, whiteboard, and streaming videos were already browser-based and did not require a download. Prior to this addition, a WC2 presenter must install a small program in order to share the desktop with other meeting participants. With the addition, a WC2 presenter has a choice of using a cross-platform Java client for desktop sharing. Other meeting participants

do not need to have Java installed. In addition to real time desktop sharing, a presenter can also share a snapshot of the desktop and allow others to annotate the snapshot. The entire desktop sharing session can be recorded and automatically synchronized with an audio conference recording using Persony's integrated audio and web conference recording feature. The recorded session can be played back immediately using a web browser

- Several interesting tidbits have come out of the Cisco telepresence department in the past few weeks. One is that the company has now deployed over 280 “telepresence” systems (according to their own definition of telepresence) inside Cisco itself in addition to 1000 systems at over 200 customers. Call it eating your own dog food or drinking you own champagne as you wish, but Cisco is claiming lots of internal usage leading to lots of cost savings and efficiency benefits. Cisco also entered the room rental business last month via a partnership with Tata Communications among others. Rooms in public spaces, including Cisco and Tata facilities and some hotels (Tata also owns hotels) will rent out for between \$300 and \$900 per hour, depending on the equipment used and the exact location. Tata claims it plans to have 100 rooms in service by the end of 2009. (Buried in the sand is Cisco’s announcement of long ago that Regus would deploy 50 public telepresence suites – we believe this deal went dead a long while ago.) Cisco’s efforts in the public space merge nicely with the company’s significant moves to enable business-to-business telepresence calls. Cisco is working with network service provider such as AT&T, Tata, Glowpoint, BT, and others to help them deploy telepresence exchange networks. Included in the announcement is the news that Cisco itself is opening a public facility at 3979 Freedom Circle in Santa Clara, CA with 1 CTS 3200, 2 CTS 3000 and 4 CTS 1000 rooms.
- Siemens Enterprise Communications announced the availability of OpenScape Mobility, bringing together from a single vendor, enterprise telephony, video, unified communications, wireless and fixed mobile convergence in a single integrated mobile UC solution. OpenScape Mobility combines Siemens HiPath MobileConnect, HiPath Wireless, and the new OpenScape Enterprise Mobile Client. Siemens is also offering security-focused professional and managed services, user training and maintenance globally.
- Avistar reported total revenues for the quarter of \$2.7M vs. \$1.8M for the quarter ended June 30, 2008, an increase of 51%. Income from settlement and licensing activity was \$1.1M in both the third and second quarters of 2008.
- Our friends in the European Union, through the AMI Consortium are running a short survey to assess IT customers’ interest in AMI-enabled next generation features for unified communications and collaboration solutions. This study gauges the readiness of the market for “smart” meeting features and tools. AMI is looking for the opinions of people who purchase and manage technologies designed to increase/improve productivity of employees, especially people who rely heavily on business meetings to achieve their goals. If you take the survey, you’ll get a copy of the results. [Click here](#) to take the survey.
- Ireland-based Aonta Technologies has introduced the ACS1000 audio conferencing media server, a software solution running on industry standard platforms.

<b>Conferencing &amp; Collaboration <a href="#">Event Calendar</a></b>	
<b>WHEN &amp; WHERE</b>	<b>WHAT &amp; WHO</b>
18 November, Andover MA - Chicago - NY - Washington DC	<a href="#">Point 9 User Forum: Selecting a Conferencing Managed Service Provider</a>
12-13 November, San Francisco, CA	<a href="#">IMTC Forum</a>
21 April, 2009 - Berlin, Germany	WR CSP Summit (1/2 day)
22-23 April, 2009 - Berlin, Germany	WR Collaboration Futures Summit
4-5 August, 2009 - Boston, MA	WR Collaboration Futures Summit

## Save These Dates – 2009 Collaboration Summit Events

WAINHOUSE RESEARCH

# COLLABORATION FUTURES SUMMIT09

We've locked down our dates for the next three Summit conferences in 2009 (see above table). Our annual April event at the Steigenberger Hotel in Berlin will feature an all-new format next year. After a half day conference focused on the CSP industry, the Collaboration Futures Summit (both Boston and Berlin) will be a unique experience for attendees to learn from and interact with industry experts,

technology leaders, WR analysts, and fellow conferencing and collaboration and IT managers as the agenda explores the major technologies and applications that are driving the future of the industry. The two-day program will cover the future of audio, video, and web applications and the social and environmental factors forcing changes at work, as well as the networking and computer technologies fundamental to enterprise unified communications. Look for the web site to go live soon. If you would like to sponsor and speak on one of the megatrends, please contact [sfargo@wainhouse.com](mailto:sfargo@wainhouse.com).

## Point Nine User Forum - *Selecting a Conferencing Managed Service Provider*

When: 18<sup>th</sup> November

Where: Andover, Chicago, Herndon, New York

Details: [wainhouse.com/point9/na.html](http://wainhouse.com/point9/na.html)



Enterprises are under increasing pressure to maximise their investment in conferencing technologies to ensure a robust and reliable service and many are turning to Conferencing Managed Services Providers (cMSP) to achieve these goals. Managed Services vary from a simple 'topping up' of in-house expertise to full onsite management of bookings, end-points and infrastructure.

Wainhouse Research has invited leading global providers of cMSP services to respond to a detailed questionnaire that we have prepared on what we believe the hot topics are for any enterprise considering cMSP services. The cMSP vendors will be presenting their responses to these one-day meetings and we offer participants the opportunity to weight our questions and score each vendor's response.

Polycom is hosting this meeting in their Telepresence studios in North America. Wainhouse Research will be providing the keynote on what is happening in this fast evolving and exciting sector and Polycom will be presenting on how they synergistically work with their channel partner network to ensure their customers receive the optimum cMSP experience.

P9 is open to end-users of conferencing solutions. If you are a conferencing manager in and would like to learn more about the cMSP challenges and successes from your peers then these highly informative sessions will be of great value. Spaces at each meeting site are strictly limited. Click on the links above to find further details. [Register early](#) to avoid disappointment! Places are going fast! Vendor participation is strictly limited to our host and sponsors.

**Hosted over Telepresence By**



**North America Sponsors**



## People & Places

Aonta Technologies, **David Seavers**, CEO, **Derek Moore**, COO

### WR PLATINUM UPDATE

[WR's PLATINUM website](#) grows each week. With more than 9,300 content items already posted, indexed, and searchable, there is no better source for information and insight into the conferencing, collaboration, and rich-media industry. Although many items (press releases, industry news items, etc.) posted on the website are available FREE to non-subscribers, the most valuable content items are available exclusively to [PLATINUM PRO](#) and [Streaming Products](#) subscribers. Recently posted PLATINUM PRO subscription-only documents include:

Date	Description
10/28/2008	<a href="#">Microsoft Office Communications Server Release 2</a> Microsoft recently announced the contents and availability of Office Communications Server 2007 Release 2. We provide our analysis and opinion.
10/28/2008	<a href="#">Reseller Survey on the Impact of the Financial Crisis on the Videoconferencing Market</a> Results of WR's 10/2008 survey of 60+ videoconferencing resellers around the world.
10/27/2008	<a href="#">Cisco and Interactive Video Communications</a> This research note reviews the many ways Cisco can provide visual communications, from low-end web-based services all the way to high end telepresence.
10/27/2008	<a href="#">Videoconferencing in 2020: A Look Ahead...</a> This presentation, delivered at the 2008 PUG conference, considers how technology shifts will effect communications in the future.
10/23/2008	<a href="#">Driving Adoption in the Enterprise</a> This presentation, delivered at the 2008 PUG conference, provides insight and field-proven tactics for increasing the adoption and utilization of videoconferencing.
10/6/2008	<a href="#">Cisco Systems' Unified Communications and the Competitive Landscape</a> Cisco has upped the ante in the unified communications market and with a complete portfolio of solutions is increasingly in competition with Microsoft and IBM.
9/11/2008	<a href="#">Comparison Matrix - Split System and Codec-Only Videoconferencing Systems</a> Matrix including detailed comparison information on split system and codec-only videoconferencing systems from leading vendors.
9/2/2008	<a href="#">Comparison Matrix - Personal Video Systems (Executive and Videophones)</a> Matrix including detailed comparison information on personal videoconferencing systems (executive systems and videophones) from leading vendors.
8/27/2008	<a href="#">From Education to Mobile Workers: Opportunities for New Products and Services )</a> This presentation shows how the applications for mobile (cellular-based) smart phones are evolving over time – and how much of what we can do for collaboration and e-Learning from a PC can be delivered to mobile devices.
8/13/2008	<a href="#">WebMessenger: Mobile OCS in the Palm of Your Hand</a> A software solution that provides mobile phone users with OCS's presence, IM, and click-to-call capabilities.

## WR Launches Coverage of Enterprise Streaming Products Market Segment

Wainhouse Research has just launched a new content subscription service, hosted on WR's PLATINUM website ([www.wrplatinum.com](http://www.wrplatinum.com)), providing in-depth coverage of the [enterprise streaming products](#) marketplace. Key vendors in this space (in alphabetical order) include Accordent, Cisco, Haivision, Polycom, Qumu, Sonic Foundry, Starbak, Tandberg, and VBrick. Recently posted *Streaming Products* subscription-only documents include:

Date	Description
10/28/2008	<a href="#">Enterprise Streaming Products – Market Size and Forecast</a> WR's estimate of the current market size and 5-year forecast for customer premise-based (CPE) enterprise streaming solutions.
10/3/2008	<a href="#">Company Profile - Accordent</a>
10/6/2008	<a href="#">Company Profile - Cisco System's Streaming Solutions</a>
10/3/2008	<a href="#">Company Profile – Starbak</a>
10/3/2008	<a href="#">Company Profile - VBrick</a>
2/7/2008	<a href="#">Comparison Matrix - Streaming Solutions (Customer Premise)</a> Detailed comparison of customer premise streaming offerings from leading vendors,

### Activating Your Content Subscriptions

For additional information and to activate your subscription, please visit [PLATINUM PRO Subscriptions](#) and/or [Streaming Products Subscriptions](#). To subscribe using a company PO or for additional information, please contact Sara Fargo at [sfargo@wainhouse.com](mailto:sfargo@wainhouse.com).

## Wainhouse Research Comparison Matrices

WR Product / Service Comparison Matrices provide in-depth comparison data about similar product and service offerings and can save readers many hours of data collection. The following matrices are available to all PLATINUM PRO subscribers ([subscription information](#)).

<p><a href="#">Set-Top Systems</a></p> 	<p><a href="#">Split Systems / Codecs Only</a></p> 	<p><a href="#">Integrated Systems</a></p> 
<p><a href="#">Multi-Codec Systems (a.k.a. Telepresence)</a></p> 	<p><a href="#">Personal (Executive Systems &amp; Videophones)</a></p> 	<p><a href="#">Desktop Client-Server Solutions</a></p> 

## Letters

Andrew: Thank you for your article on LifeSize in the October 15, 2008 newsletter. I would like to clarify two points with respect to the bandwidth requirements of our new LifeSize Room 200 system. The bandwidth required for 720p resolution at 60 frames per second is 1.1Mbps versus the 1.4Mbps published. In addition, you mentioned in your article that the LifeSize Room 200 provides a mode with dual 720p30 streams (one for video and one for presentation). It does so at 1.5 Mbps. [dmorrison@lifesize.com](mailto:dmorrison@lifesize.com) ( David Morrison, Sr. Product Manager)

The Wainhouse Research Bulletin would like you to join us in thanking our 2008 sponsors who help keep distribution of the WRB free:

[Aethra](#)

[HaiVision Systems](#)

[AGT](#)

[Kedacom](#)

[Cisco](#)

[LifeSize](#)

[Compunetix](#)

[Mirial](#)

[Dialcom](#)

[Talk & Vision](#)

[GlobalMedia](#)

[Visual Nexus](#)

[Haedenbridge](#)

[VTEL](#)

The fine print: [Sponsorship](#) of the WR Bulletin in no way implies that our sponsors endorse the opinions expressed in the WRB. Nor does it imply that the Bulletin endorses their products or services. We remain an equal opportunity critic.

© 2008 Wainhouse Research 34 Duck Hill, Duxbury, MA 02332 USA Tel +1 617.975.0297  
Email to: [editor@wainhouse.com](mailto:editor@wainhouse.com) PR to: [news@wainhouse.com](mailto:news@wainhouse.com) Free subscriptions: [www.wainhouse.com](http://www.wainhouse.com)