

NEWS AND VIEWS ON REAL-TIME UNIFIED COMMUNICATIONS

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.

Andrew W. Davis, andrewwd@wainhouse.com

News in Brief

- Sony has released new software (V2.03) supporting the company's 1080i PCS-XG80 system (MSRP \$8,999). New features include compatibility with the MPEG-4-AAC-LD and MPEG4-AAC-LC audio formats, support for 720p video at 768kbps bandwidth, HD video transmission capabilities at narrow bandwidths (768Kbps), and Intelligent QoS algorithm to maintain a connection in low bandwidth conditions and with more than 10% packet loss. The XG80 also supports dual streams of HD and has a 6-site embedded bridge option.



- In one of the more interesting announcements we have seen, AVI-SPL is joining up with Glowpoint to launch a managed services program for videoconferencing and collaboration. The new offering, ConferencePoint enhances AVI-SPL's current room build and integration, customer care, and onsite staffing models by adding comprehensive remote managed service support for both traditional video and telepresence environments. Reflecting the wide variation in user's needs, ConferencePoint has three levels of services. 1) VNOC Managed Services includes comprehensive monitoring, room management and scheduling, call launching, 24/7 help desk, and performance reporting for telepresence and HD/SD video environments. 2) Connect and ConnectPlus delivers QoS connectivity, dialing plans, ease-of-use features and the support necessary to make HD and SD video conferencing successful. 3) Conferencing Services offers a full complement of multipoint videoconferencing, bridging and streaming, with inbound reservations and comprehensive support. Customers will have exclusive access to the ConferencePoint series through a customer portal and via live, 24/7 conferencing production and support teams.

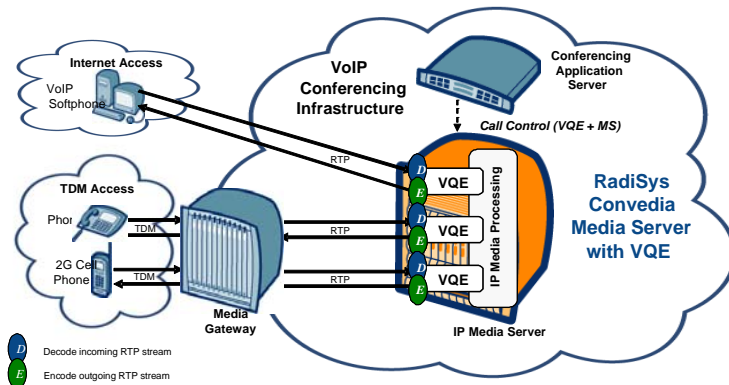
Here's What I Think: This is a move in the right direction and while not an outright merger / acquisition, this synergistic partnership mirrors the BT-WireOne marriage of about a year ago, combining expertise in videoconferencing with expertise in QoS IP networks to handle video traffic. Glowpoint was ahead of its time with its video operator, video mail, dial plans, and gateway / bridging services, but time is indeed catching up with Glowpoint. For the videoconferencing and telepresence industry to mature, we need to move towards easier-to-use systems that are not a support headache and we need low-cost, efficient *remote* managed services. Many of the video MSPs have heard me scorn them for focusing on on-site (manual) support staff programs rather than scalable remote services that would appeal to more than the Fortune 250 user base. The wheels of progress are turning.

- Konftel announced that it will be supplying (SIP-based) VoIP conference phones to Germany-based snom technology AG.
- Audio and web conferencing specialist MeetingZone has opened an office in Toronto, Canada.

- Tandberg announced a partnership with VoIP applications provider BroadSoft focused on hosted business video communications solutions. BroadSoft provides VoIP applications to eight of the top 10 and 14 of the top 25 carriers worldwide. This partnership links BroadSoft's hosted UC applications platform with video systems from Tandberg, including the E20 videophone, the 1700 MXP executive system, Tandberg's line of room systems, and Codian bridges. The goal here is to enable service providers to deliver rich media IP communications solutions to customers in an SaaS model. While Tandberg's infrastructure is likely to be delivered as a cloud-based service, we suspect customers will acquire E20's and 1700 MXP's as HaaS (hardware as a service)!

Here's What I Think: This is an important example of integrating visual communications with VoIP and unified communications. In this case, the focus is on service provider and carrier enablement, but the concept also applies to integration products and services sold to end users by Cisco, Avaya, Nortel, Siemens and the like. After 25 years of videoconferencing developments, we've learned that integration into the business communications environment is key to driving wide-scale adoption of visual communications.

- Media-server giant Radisys has introduced a new software-driven conferencing feature for the company's Convedia media server family. Dubbed VQE (voice quality enhancement), the software adds noise reduction and noisy line detection algorithms, packet loss concealment, acoustic echo cancellation, and new monitoring / reporting functions.



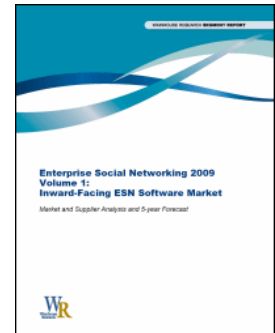
Comment: While Convedia and others are providing important elements to make voice over IP networks a more reliable and pleasing experience (and lower cost) for end users, we think that one of the really neat benefits of VoIP over POTS is the ability to have wideband audio. One of the first things you notice with Skype audio calls is the rich sound from wideband.

- Every once in a while we run across a company in the conferencing and collaboration space that we never heard of. It does happen! In this case, we received email from a videoconferencing company that was nowhere on our radar screen: Pixavi. Yes indeed, another videoconferencing company headquartered in Norway! Founded in 1999, Pixavi has focused on mobile video communications products, many intended for harsh or rugged environment, and several of them appear to be "wearable." New from Pixavi is the Xcaster, a hand-held, portable, HD videoconferencing system available in splash-proof, water-proof, and explosion-proof versions. Pixavi claims the device supports 802.11 a,g,n wireless standards, H.323 and SIP, and interoperability with HD and telepresence systems from Cisco (???), Tandberg, Polycom, Radvision, and others. Prices ranges from \$8K to \$14K depending on ruggedness. Awfully big claims. Interesting nevertheless.



The Xcaster from Norway's Pixavi

- CallTower announced the launch of a hosted solution combining Microsoft OCS 2007 and Cisco Unified Communications Manager (CallManager). The integrated solution provides a single interface and bill for telephony services, web and audio conferencing, unified messaging, voice to text, text to voice, Internet, presence, screen pops and more. CallTower's on-demand CallManager solution with a fully integrated OCS platform delivers UC without capex, expensive infrastructure, or network upgrades. (We are aware of at least one other provider, Orange Business Services, that offers a similar solution.)
- The Wainhouse Research **Collaboration Summit** in North America will be held August 4-5, 2009 at the Royal Sonesta Hotel in Boston (same location as last year). Mark your calendars now. Details to follow.
- Despite a down economy, sales of inward-facing Enterprise Social Networking (ESN) platforms rose 29% in 2008 and will grow another 26% in 2009 according to the new WR study, [Enterprise Social Networking 2009 Vol. I – Inward Facing ESN Software Market](#). “Tough times require greater productivity while drastically cutting travel and other expenses,” said WR ESN Practice Manager William F. Zachmann, “and inward facing ESN platforms do all of the above!” The study includes fundamental analysis of inward facing enterprise social networking platforms, current market sizing and five-year forecasts, and profiles of key vendors and their products. For more information, including the Executive Summary, click on www.wainhouse.com/reports.



- Wainhouse Research, in collaboration with NetForecast's IP video network expert John Bartlett, will be running a four-session [conference within a conference at VoiceCon](#) this year, March 30-31 in Orlando, Florida. VoiceCon has become one of the largest events in the world for conferencing, collaboration, and unified communications technologies. Our sessions will cover videoconferencing products, services, support strategies, and network readiness with some lively panel discussions as well.
- ClearOne, whose former CEO Fran Flood appears to be headed to federal prison, announced a new distribution partnership with Digital China, reportedly the largest distributor of IT products and services (vs. AV products and services) in China. ClearOne also announced the availability of the Converge SR 1212A digital signal processing mixer with four channel power amplifier that interfaces with 8 ohm or 70v/100v loudspeaker systems. The SR 1212A is designed for sound reinforcement applications.



- HaiVision and Zixi announced the first successful broadcast of live HD video over the public Internet. The broadcasts were transmitted from the Columbia University Medical Center (CUMC) in New York City to remote studio facilities in the United States and simultaneously to several other sites worldwide, where viewers accessed video using either a Web browser or an Internet-enabled (IP) set-top box. The real-time HD broadcasts were transmitted over the Internet using Zixi's IVDN platform to recover and reorder lost packets in real time. The HD (1080i) feeds (6 Mbps) were transmitted between the CUMC and convention centers using HaiVision's MAKO-HD H.264 HD codecs. At other locations worldwide, audiences simultaneously viewed the transmission using software decoders on standard PCs. The Internet services at both ends were standard general-purpose ISP

Your company name & link here!
Join the elite group of WR Bulletin
sponsors for 2009 & get your word out!

Contact Sara Fargo, sfargo@wainhouse.com

The Wainhouse Research Bulletin would like you to join us in thanking our 2009 sponsors who help keep distribution of the WRB free:

Aethra	Haedenbridge
AGT	LifeSize
Cisco	Talk & Vision
Compunetix	Teliris

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.

connections. According to the press release, the latency from source to destination — including the MAKO-HD's 70 ms of encode and decode — was under 500 milliseconds, and the transmission exhibited no re-buffering pauses.

- 8x8, announced the availability of its MobileTalk mobile international calling service for Blackberry Android, Blackberry Storm and Blackberry Bold phones.

News in Cisco

Two recent announcements from our friends in San Jose demonstrate once again the wide ranging vision of Cisco and the company's willingness to upset nearly any applecart.

If you thought unified communications (UC) was a confusing nomenclature, now we have Cisco's new UC or UCS, unified computing system, a data center initiative that will have Cisco entering the server or cloud computing space by selling its own Intel-based servers. Cisco's UCS is made up of three broad components: network infrastructure, blade servers, and management software. The company claims it is not moving into the generic blade server market that its partners (and now competitors) HP and IBM serve, but rather is focused on creating and supporting virtual machine environments. According to stories in the Wall Street Journal, as the IT industry matures, we can expect to see more encroachment, more competition as big companies get into each others business. Examples quoted: H-P has fueled a new rivalry with IBM in tech outsourcing by buying services giant Electronic Data Systems; Microsoft-Google-Yahoo mess; IBM possibly acquiring Sun Microsystems; and of course, in that other UC space, we have Microsoft, Cisco, and IBM all cooperating and competing at the same time.

When Cisco talks about video, they aren't limiting themselves to videoconferencing and telepresence, but rather to visual communications of just about any type. Hence, the latest video move after paying \$5.3B for Scientific Atlanta in 2005 and announcing telepresence systems in 2006, is the \$590M all-stock deal announced last week to acquire Pure Digital Technology, maker of the FLIP line of pocket-sized camcorders. According to Ned Hooper, Sr VP of Cisco's Corporate Development and Consumer Groups, the "acquisition of Pure Digital is key to Cisco's strategy to expand our momentum in the media-enabled home and to capture the consumer

market transition to visual networking." Remember, Cisco paid \$500M in 2003 to acquire Linksys. Cisco has spoken publicly in the past about "telepresence for the home." Flip camcorders are a long way from 1080p, life-size telepresence, but the path is beginning to appear, with Cisco now present in video acquisition (including HD), home routers, and set top boxes for cable networks..... let your imagination run wild.



People & Places

Glowpoint, **Joe Laezza** and **David Robinson**, Co-Chief Executive Officers, with **Mike Brandofino** voluntarily resigning as CEO and a member of the Board. The company also announced raising additional equity capital and retiring all outstanding debt.

Mirial, **Brice Drogosch**, VP Sales, Americas, most recently with Telanetix.

MeetingZone, **Kim Leite**, Director of Operations, Canada

WRB 简体中文版发布啦!

Désormais disponible en Français

Ahora disponible en Español

See www.wainhouse.com/bulletin to subscribe ...

Chinese, French, and Spanish

Collaboration Futures Summit – Berlin 2009 (NEXT MONTH)

The Collaboration Futures Summit will explore 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.

WAINHOUSE RESEARCH

COLLABORATION FUTURES SUMMIT09

21 April 2009: CSP Summit (1/2 day)

22-23 April 2009: Collaboration Futures Summit

Berlin Summit to be







WEBCAST LIVE

Can't travel to Berlin this year? Participate via live Internet webcast through our arrangements with ON24.

Details shortly at [Summit website](#).

NEW this year at The Collaboration Summit in Berlin – a [CSP Summit Pre-Conference](#) – a half-day conference (12:00-17:00) specifically designed for the needs of CSPs and their partners. Spend the afternoon hearing from industry leaders, including WR Managing Partner and CSP Practice Area Manager Marc Beattie, who will present on the state of the European collaboration services market and probabilities for new growth, including Enterprise Social Networking, Unified Communications, VoIP, and Video Telepresence strategies. The conference and cocktail reception provide an opportunity for guests to expand their thinking and network with peers and technology partners.

Early registration discount is available until 1 April. Visit www.wainhouse.com/berlin09 for the full details on this international conference. The [registration web page](#) is now live.

	Markus Weisbrod / Microsoft The Future of Collaboration Tools		Fergal Burke / ON24 Virtual Meetings and Virtual Events: the new economics		Andy Nilssen / Wainhouse Research Virtual Teaming: where are we now and were are we going?
	John Paul Williams / Tandberg The strategic value of video in business process transformation		Jon Neville / Wainhouse Research You've Decided on Unified Communications: Now what?		Moshe Machline / Radvision Breaking the boundaries of videoconferencing

[2009 Collaboration Futures Summit](#) Sponsors

[2009 Berlin
CSP Summit](#)
Sponsors





Collaboration Futures Summit Agenda Overview

For session abstracts, speaker bios, and registration see www.wainhouse.com/berlin09

21 April CSP SUMMIT	
Welcome & Introduction	Marc Beattie / Wainhouse Research
State of the Industry & Positioning Collaboration Services for Strategic Value	Marc Beattie / Wainhouse Research
Enterprise Social Networks and the ESN Hosted/Managed Opportunity	TBD
Managed Audio Conferencing Services	Monica Coraluppi / Compunetix
Video Telepresence & CSPs: Equipment and Services Opportunities	Henrik Michel Kjaer / Cisco Systems
Untapped Opportunities in Audio Conferencing	Ray Adensamer / Radisys
How Mobile Conference Solutions Change the Market	Steve Flavell / Ring2
Beyond the Conversation, How Emerging Technologies Can Engage more Participants in the Call (and drive new revenue for CSPs)	Dr. Tilman Becker / DFKI
Where Unified Communications Fits in the CSP Service Wrap	Larry Velez / Microsoft
Wrap Up & Summary	Marc Beattie / Wainhouse Research
Networking Cocktail Reception	
22 April COLLABORATION FUTURES SUMMIT	
Welcome	Andrew Davis / Wainhouse Research
Conferencing in 2020: Discontinuities Ahead	Andrew Davis / Wainhouse Research
Competing in the New World Economy	Allan Bjornstad / Tandberg
Coffee break / Exhibits	
Mobility and the Collaboration Future	Jerry Pompa / Compunetix
the Future of Collaboration Tools	Markus Weisbrod / Microsoft
How will UC affect the future business environment.....??	Sven Damberger / MVC
Virtual meetings and virtual shows: will this be the last conference we will attend in person?	Fergal Burke / ON24
The Future of Audio & Web Services for the Enterprise	Michael Eastman / Wydevoice
Coffee break / Exhibits	
You've Decided on Unified Communications - Now What?	Brent Kelly / Wainhouse Research Jon Neville / Wainhouse Research
Panel discussion	
Networking Reception / Exhibits	Exhibit hall
23 April COLLABORATION FUTURES SUMMIT	
Welcome	Andrew Davis / Wainhouse Research
2019: Where are Online Collaboration Services Headed in the Next 10 Years?	Marc Beattie / Wainhouse Research
The Services Future for collaboration service providers and their customers	Ralf Nikolai / Disy
Coffee break / Exhibits	
Video applications explosion and the impact on the IP network:	Roy Skillicorn / Cisco
The Strategic Value of Video in Business Process Transformation	John Paul Williams / Tandberg
Breaking the Boundaries of Videoconferencing	Moshe Machline / Radvision
Virtual Teaming: where are we now and where are we going?	Andy Nilssen / Wainhouse Research
What is the future of networks for video communications?	John Bartlett / Netforecast
Panel discussion	
Adjourn	

© 2009 Wainhouse Research 34 Duck Hill, Duxbury, MA 02332 USA Tel +1 617.975.0297
 Email to: editor@wainhouse.com PR to: news@wainhouse.com Free subscriptions: www.wainhouse.com