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Berlin Collaboration Summit to be Webcast

While we have recorded our Berlin Summit presentations for playback, this year we've made arrangements with ON24 to stream almost the entire event live (as well as archived for later playback). We hope those of you who cannot travel to Berlin this year will be able to join us via interactive webcast and enjoy the lively discussions and thought provoking talks on the future of conferencing and collaboration right from the comfort of your own office or home. To register for the webcast, please visit www.wainhouse.com/berlin09. Details on the agenda, schedule, speakers, and topics are all available there as well.

VoiceCon in Brief

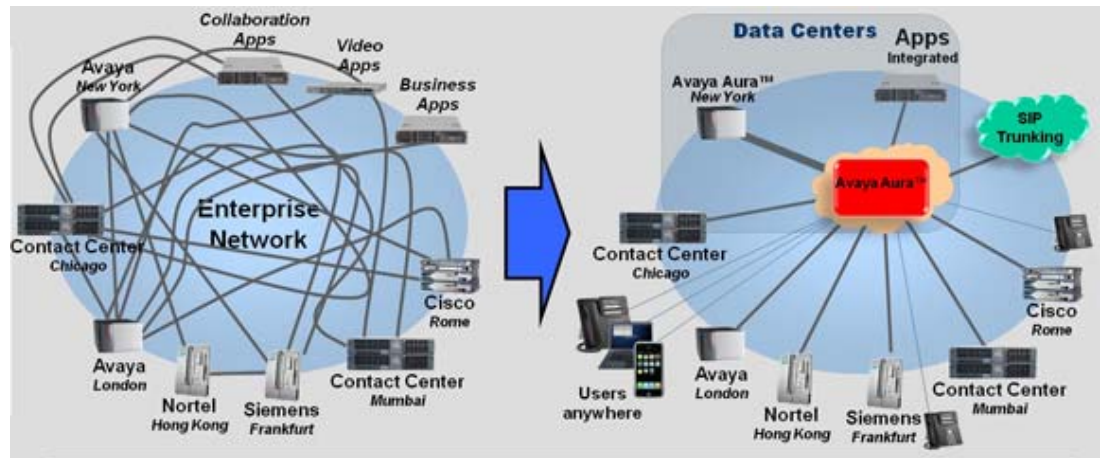
Last week's VoiceCon demonstrated there is still strong interest in unified communications and VoIP and that more and more companies are seeing UC as the gateway to desktop video. Wainhouse Research analysts were at VoiceCon in force, giving seminars and presentations, and generally scouting for news of interest.



Unified Communications at VoiceCon

- The big news at VoiceCon was that unified communications can help you reduce travel, cut greenhouse emissions, be more efficient, make decisions faster. It can do just about everything except help me grow hair on my bald head. At least, that was the message in keynote presentations from Microsoft, Cisco, Avaya, IBM, and Siemens. Perhaps the most fun event at the show, other than the numerous hospitality suites, was the Wednesday keynote address by **Microsoft** Corporate VP Gurdeep Singh Pall. Smart, polished, informed, and opinionated, Gurdeep gave a brilliant talk on the future of unified communications and voice as a software application. In the process, he never missed a chance to ding Cisco and others still promoting those nasty antiquated hardware devices called "phones" or "PBXs." Gurdeep also pointed out that many Microsoft competitors have simply relabeled their telephony products as UC products, even though they represent no advancement in technology or functionality. This of course, is why UC is such a big business today – the market has been redefined to include just about everything except fruit-flavored breakfast food cereals.
- In terms of major UC product announcements from major vendors, the biggest story might be **Avaya** Aura, an architecture or product portfolio that supports Avaya and third party enterprise communications systems and applications across media and modes, networks and devices. Aura is based on the media server/application server technology Avaya obtained when it acquired Ubiquity in January 2007. At the heart of Aura is the SIP Session Manager, a device and manufacturer independent SIP routing engine. Using connectors or adaptors and gateways (for TDM), Aura is able to connect to PBXs from other vendors including Cisco, Nortel, Siemens, and Avaya's own Communication Manager. Also connected to Aura are one or more media

servers that can provide IVR, audio and video bridging, recording, and other media intensive applications.



In addition, the Aura architecture enables application sequencing per the IMS standard. Application sequencing allows developers to independently write small programs or applications that can be inserted in a communications process flow to provide control, filtering, screen pops, and any number of other functions based on the data (i.e. phone number, identity, etc.) associated with a particular communications session. Aura will compete with a similar system from Nortel (ACE), and Siemens OpenScope. Interestingly, IBM announced that Aura (and Nortel ACE) can be part of the back end to Sametime Unified Telephony replacing the Sametime Telephony Control Server. Whether Aura will truly simplify UC deployments for end user customers remains to be seen.

- The **Siemens** keynote referenced Siemens' deal to run its OpenScope software on Amazon Web Services, a deal that could bring cloud computing to public communications. With OpenScope software running in the Amazon cloud, a user could sign up for service via a portal, and literally check off the services and provisioning that she wanted: SIP trunks, delivering video or Web collaboration applications, on specified devices, billed to a customer account or even a credit card. Such a portal could even download a softphone or Web client to the user. Siemens is in the midst of a huge reorganization which we've written about before – the company is now part of the Gores Group. On the product side, Siemens announced “a boatload” of new UC products and services including OpenScale Professional Service and Integration Solutions that, coupled with the company's OpenScope UC Application, can help organizations eliminate the guesswork of integrating their UC technologies with existing business applications.

Video Communications at VoiceCon

- There were enough video systems on display at VoiceCon that more than one attendee commented the event should be renamed VideoCon. Cisco, Polycom, and Tandberg had a large presence on the floor, while Vidyo and Radvision were there supporting partners. The prize for most new announcements in the video category definitely goes to **Cisco** this year. Cisco's news included: 1) Advanced WebEx video with Cisco Unified Video Conferencing (CUVC). CUVC is Cisco's OEM version of Radvision's SCOPIA. So Cisco has brought the Scopia video application into the WebEx UI. Users can connect to any standards-based video system, see up to 16 simultaneous windows. The company also claims HD support, but given the screen size available, we aren't sure how this is relevant. And finally, they call this “TelePresence in WebEx,” adding insult to the concept of TelePresence. It appears that while WebEx is a hosted service, the customer might need to buy his own CUVC. Hence, this might be better positioned as adding webconferencing to CUVC rather than adding industry-standard video to WebEx. This announcement also makes us wonder what Cisco is doing with the scalable video capabilities they licensed a while back from Vidyo. [Check out our research note on this.](#) 2) The new

“telepresence” system from Cisco is the CTS 1300 (\$84.9K). This is a single-screen, single-codec, 3-camera system that uses voice-activated switching to show in life-size just one of the 2-seat segments. Users get life-size 1080p images, a 65” display, bandwidth efficiency, and lower room preparation costs, but 4 of the 6 chairs at the table are not visible at any one time. [Check out our research note on this.](#) 3) The Cisco TelePresence Recording Studio is a slick system for making 1080p recordings (one button to push) and then have those recordings automatically and instantly available for playback via Cisco’s infrastructure on another Cisco TelePresence system, a PC, and iPhone, or a digital signage system. We tried it out at the show and were duly impressed. 4) Cisco Telepresence Event Controls is a user interface system that gives an operator complete control of telepresence display systems (who is seen when and where) for staged or scripted special events.

- The show stopper in **Tandberg’s** booth was an impressive technology demonstration of 1080p60 videoconferencing dubbed FluidHD. Yes, 60 frames per second at 1080 resolution. Incredibly smooth motion handling combined with incredible image detail. But is it practical? Well, the call we saw was at 4 Mbit/sec – not an outrageous bandwidth in today’s day and age. But do you need it for your meetings? Only your hairdresser knows for sure. [Check out our research note on this.](#) Prominent in Tandberg’s booth was the team from **Broadsoft**. Tandberg and BroadSoft have partnered to offer BroadSoft’s BroadWorks Hosted UC application platform with Tandberg’s portfolio of visual communications solutions, including the E20 video IP phone, the 1700 MXP personal telepresence system, the Profile 6000 MXP, and the TANDBERG Codian MSE 8000 Series multipoint control units. BroadWorks is offered to end users through a network of Broadsoft’s carrier partners. Astute visitors to the Tandberg booth also got a nice look at the not-yet-released HD webcam, a view of Movi running on a \$300 netbook, and a not-yet-released-but-very-impressive-nevertheless demonstration of the Tandberg Content Server version 3.3 software.



- The attention grabber in **Polycom’s** booth was a three-screen TPX “telepresence” system, now available with the company’s newest video codecs supporting 1080p and 720p60 and 720p30 (as well as lower resolutions when needed). The new and expanded HD capabilities are also being made available with the immersive RPX systems. Polycom was also demonstrating the new Polycom VVX1500 business media phone (videophone really!) in use via the SIP protocol with IBM Lotus Sametime Unified Telephony.

Other bits and pieces

- **ShoreTel** released version 9 of its UC software with expanded features for personalized communications, including location-based services. The product suite integrates with OCS 2007 and Microsoft Active Directory.
- **8x8** has introduced an enterprise version (as opposed to a home version) of its hosted IP PBX phone service. Dubbed 8x8 Virtual Office Enterprise, the solution delivers advanced PBX features without requiring the customer to invest in on-site equipment.
- **Global IP Solutions** announced that CommuniGate Systems has embedded the company’s VoiceEngine to power CommuniGate’s Pronto client UC framework – a system sold to mobile and broadband network operators.

- In one of the stranger announcements at VoiceCon we learned that **Microsoft** has turned its RoundTable product over to **Polycom** completely. The Polycom CX5000 is now a Unified Conference Station addressing the needs of organizations that rely on OCS 2007 and Microsoft's Live Meeting service. While RoundTable has been positioned in the past as a USB-based, OCS-based room video device from Microsoft, Polycom is leveraging its strategic relationship with Microsoft to position the CX5000 as a voice device. Go figure! In [WR Bulletin Vol 9 #08 \(March 3, 2008\)](#) we published some of our thoughts on this most unusual peripheral device in our "RoundTables and Square Rooms" article.
- **Cisco** has integrated WebEx to its IP telephone system so that users can now launch a WebEx conference directly from their IP phones..... guess how many buttons it takes to do this !!

VoiceCon Comments from WR's Brent Kelly

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The final day at VoiceCon had vendors, consultants, and some end users on the stage to provide a wrap up. A few key takeaways from these sessions include

- There is slowness in UC adoption generally among end users. In addition, there is a surprising lack of process toward how IP telephony and unified communications are deployed. Some people deploy a video-enabled UC client and only afterward consider whether they should support video and what impact video will have on their infrastructure. Oops.
- Mobility should be an important element considered in any UC deployment. Mobility consists both of cellular handsets as well as enterprise Wi-Fi solutions. A new term was coined, "Mobile Communications Enabled Business Processes". (Does this "Mobile" modifier make the definition of UC any clearer? – I didn't think so either!)
- IBM and Microsoft appear to be the UC innovators. That being said, Cisco appears to keep competitors off balance with new video developments, moving more into the network cloud, etc. And speaking of the cloud, the cloud computing forum concluded that "the partly cloudy approach appears to be mostly sunny." Expect to see a lot more on UC as a service in the future. The key advantage is that the vendor/hosted provider approach brings the complicated infrastructure together, making it easier for companies to run in the cloud.
- ROI must be less than a year in the current environment. Wells Fargo (Wachovia) suggested that after a thorough analysis, it could not find a return on UC. That being said, the company is looking forward to the Web 2.0 communications interfaces to "allow small teams to quickly create and change applications." Wells Fargo also said that it is looking to eliminate 50% of its desk phones in favor of mobile handsets which have PBX functionality. Most people use the desk phone primarily as a speaker phone.
- UC is not for everyone, particularly those in environments where "discoverability" is a hot legal issue. An example one company mentioned is that it will not give traders any UC capabilities. One analyst then suggested that these "trader" employees will deploy their own UC (particularly public IM) solutions. So the debate rages on regarding control of sensitive information.
- Look for new definitions for SLA's. For example, Verizon Business mentioned that it provides a boarding pass application for one of the major airlines. The company has a specific SLA just for this one application. We should expect to see SLA's applied to many more applications with increasing granularity in the applications serviced.

VoiceCon Comments from WR's Jon Neville and Richard Norris

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The keynote presentations given by Cisco, Avaya, Microsoft, Siemens and IBM showed that just how far UC solutions have come – a veritable feast of functionality and, with increasing integration with their partners' rich media solutions, the collaborative options for the end-user are now overwhelming. However, the end user presentations given by Duke University and Kraft Foods showed there is a widening chasm between what solutions are available and what the

enterprise is ready for. The current economic chill has only served to increase the focus on project spend in most enterprises. With less money available, and in some cases with fewer IT people to support and implement collaborative solutions and with the general confusion over what to do to unify communications, the lag between what's possible and what's implemented will widen, at least for the short to medium term. The onus is on those of us in the industry that can help the enterprise through the minefield of defining a successful strategy and integrating what's possible in the UC world with existing business processes. We were encouraged by the increased time given to UC-as-a-service. This is an attractive option for all enterprises that are interested in leveraging the benefits offered by implementing UC but do not have the capex or resources to implement on-premise offerings. 'Conferencing in the Cloud' is an expression we will hear increasingly often.

First Ever European CSP Summit: 21 April 2009 Berlin

In addition to our annual Collaboration Summit in Berlin this year, for the first time Wainhouse Research will be holding a **CSP Summit pre-conference** specifically designed for the needs of Collaboration Service Providers (CSPs) and their partners.



The half-day event held on **Tuesday, 21 April** will cover how hosted and managed services fit into **Enterprise Social Networking, Unified Communications, VoIP, and Video Telepresence** strategies and applications. For additional details, including registration and the meeting agenda please visit www.wainhouse.com/cspberlin09. This year's CSP Summit is being sponsored by Compunetix and RadiSys. A sample of some of the issues and presentations:



Video Telepresence & CSPs: Equipment Sales, Hosted, and the Managed Services Opportunity

Henrik Michel Kjaer, Business Development Manager, Cisco Systems

Mr. Kjaer will discuss Video Telepresence & CSPs, providing an overview of Equipment Sales, Hosted, and the Managed Services Opportunity.



Untapped Opportunities for Audio Conferencing

Ray Adensamer, Senior Manager, Product Marketing, RadiSys

Mr. Adensamer's session will focus on untapped opportunities derived from deploying next-generation VoIP architectures based on open standards. With advances in service delivery platforms, CSPs can improve the scalability and economics of their audio conferencing infrastructure.



Managed Audio Conferencing Services

Monica Coraluppi, Director of Business Development, EMEA, Compunetix

Ms. Coraluppi will explore Managed Audio Conferencing Services and how next-gen hybrid approaches can assist in both retaining the customer relationship as well as uncovering new revenue streams.



State of the Industry & Positioning Collaboration Services for Strategic Value

Marc Beattie, CSP Practice Manager, Wainhouse Research

Marc's session will focus on the state of the CSP market in Europe with a special focus on local market opportunity. Additionally, the topic of positioning services for strategic value is relevant given the advent of Unified Communications.

Collaboration Futures Summit – Berlin (TWO WEEKS AWAY)

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.

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

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

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Participate via live Internet webcast through our arrangements with ON24.

[Register now.](#)

	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 where are we going?
	John Paul Williams / Tandberg The strategic value of video in business process transformation		Sascha Hach / Google The collaboration future in the cloud		Moshe Machline / Radvision Breaking the boundaries of videoconferencing

... and more. See [full list of speakers here](#), agenda on next page of this Bulletin.

2009 Collaboration Futures Summit Sponsors

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Berlin 2009 - 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	

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