

NEWS AND VIEWS ON REAL-TIME UNIFIED COMMUNICATIONS

We're packing our bags to head off to the InfoComm show in Orlando next week. In preparation, we have noticed lots of pre-announcement announcements about what's on view at this giant AV integrator show that now serves as one of the conferencing industry's main events.

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Andrew W. Davis, andrewwd@wainhouse.com

InfoComm Previews

InfoComm, with its focus on audio-video technologies and channel partners, is also the scene for many conferencing and collaboration announcements, especially in the video arena. Here are some of the tips we have received and some of the things to look for at Infocomm in Orlando next week.

- HaiVision will be showing its new MAKITO HD H.264 encoder, a transatlantic demonstration of a next generation 3D communications system – Musion's Interactive 3-D Hologram; and the BARRACUDA, a compact "mini-blade" SD H.264 encoder complimentary to the MAKITO.
- Aethra will be debuting the company's Xtreme 300 HD videoconferencing system. (see below)
- Teliris will introduce its 6th generation telepresence system; we believe this version will support the hot technology of the year – scalable video coding (H.264 SVC).
- Radvision will up the ante with SCOPIA Desktop v7 – now supporting H.264 SVC and MORE. (see below)
- Tandberg, besides presenting in at least eight different sessions, will be showing new infrastructure products aimed at speeding video adoption.
- The IMCCA will be hosting a Telepresence Day all day on June 18 – including an "Ask the Experts" panel hosted by WR's Ira Weinstein. Attend in life size!
- Glowpoint will demo its telepresence interexchange network (TEN).
- Sony will be intro-ing 2 new HD PTZ cameras. Both are aimed squarely at the mass HD codec market and feature a 10x optical zoom, can work at very low light levels, and pan silently at an exceptional 300degrees/second. Each camera is capable of storing six position presets and, unlike the existing EVI-HD1 that has a HD-SDI interface, the new cameras come with a DVI-I interface. The only functional difference between the two new units is in resolution. The EVI-HD3V provides 720p/60fps while the EVI-HD7V delivers 'true HD' - 1080p/60fps and is fully

backwards compatible (VGA, 720p, 1080i). The best news comes in their pricing. The MSRP of the EVI-HD3V is \$3,500 and the EVI-HD7V is \$4,700. The EVI-HD1 that was launched in 2006 has a SRP of \$4,000.



New HD Line up from Aethra

Italy-based Aethra has introduced a new HD videoconferencing product line based on an entirely new hardware platform and a totally revised, next-generation user interface system (both hand-held remote and software system). The new Xtreme products are split system available in three models: Xtreme 300 (\$7,499) with a customized Aethra (Elmo PTC-501) camera running 720p30 video resolution (1080p30 available via software upgrade) with dual video included; Xtreme 360 (\$8,999) with a Sony EVI-HD3V camera supporting 720p30 and 720p60 video resolution; and Xtreme 380 with a Sony EVI-HD7V camera and support for 720p30, 720p60 and 1080p30 video resolution. The Xtreme 380, fully equipped with a 9 site CP MCU (valued at \$4,500) that supports mixed mode conferences, up to 12 Mbps of bandwidth (6Mbps is standard, the upgrade costs \$1K), and 1080p video resolution, has a list price of \$19,499 complete. The product line is modular and customers can add additional features and capabilities (e.g. 1080p support, internal MCU, 12 Mbps bandwidth support, ISDN support, etc.) via software upgrades. All systems support AAC-LD wide-band audio plus G.719 audio coding at 20 kHz. Features unique to the Xtreme line are the ability to send two simultaneous video signals at 1080p resolution, embedded 9-way MCU and WUXGA (1920x1200) graphic input. Aethra systems support H.323, and IETF-SIP as well as H.320 with an optional hardware module.



Here's What Andrew and Ira Think: We haven't had a chance to see these systems in the flesh (perhaps they will be at InfoComm next week?), but based on the paper documentation, also known as slideware, the story is impressive. These systems will be on par or better, in terms of price and feature-set, with the leading HD systems from LifeSize, Polycom, Sony, and Tandberg. The question remains however, as to whether Aethra can establish a North American channel partner network. After several years of trying, the company has had some success, but nothing major in North America. And whether this new and impressive product line will motivate some channel partners to take on and actively promote the Aethra line remains to be seen, but the company needs to establish a sales and support team in the US first to make channel partners or OEMs comfortable. Many readers may be unaware that Aethra has been in the videoconferencing market longer than any of the other current players, so give them credit for perseverance, abetted by commercial success in some European and South American markets.

SCOPIA Desktop Supports Point-to-Point H.264 SVC

Radvision has introduced v7.0 of its desktop conferencing software, adding support for a) direct point-to-point desktop video calls, b) directory support for simplified calling, c) scalable video coding with H.264SVC, and d) enhanced firewall traversal capabilities, and e) offline access to HD recordings via the SCOPIA portal.

Under version 7.0, point-to-point desktop calls are now brokered by the SCOPIA Desktop Server, and the media traffic flows directly between the two participating endpoints instead of through the SCOPIA MCU. The result is decreased latency (delay) during the video session, and the ability to host point-to-point calls without using MCU ports. Note that calls between SCOPIA Desktop clients and standards-based H.323 / H.320 endpoints will still leverage the SCOPIA MCU as a gateway.

The new directory function provides desktop users with a contact list, simple presence, and the ability to double-click to call one person, multiple people, or a SCOPIA meeting room. The

directory is stored within the iVIEW management system and locally cached by the SCOPIA Desktop server, a configuration which allows for a distributed environment and provides users with a usable directory even if LAN/WAN access to a specific iVIEW server is lost. The directory system can be disabled for environments using Microsoft OCS or IBM Lotus Sametime.



Version 7.0 also adds support for H.264 SVC (scalable video coding) within the SCOPIA Desktop client. For those still unfamiliar with SVC, the key benefit is the ability to host video sessions over lossy networks (e.g. the public Internet). For now, this capability is only supported during point-to-point calls between SCOPIA Desktop clients.

Radvision has also improved the NAT / firewall traversal capability within the desktop platform by adding STUN / TURN capabilities to the SCOPIA Desktop platform. When making a point-to-point call, SCOPIA tests the connection

directly between the devices. If there is a firewall issue, the system attempts to traverse the firewall using STUN. If that doesn't work, the software attempts to make the connection using the SCOPIA Desktop server as a relay TURN server. If THAT doesn't work, the system shifts to the current method of TCP tunneling. (If that doesn't work, they suggest using the telephone).

It is also worth pointing out that version 7.0 includes a new video codec that is optimized for all generations of Intel processors from Atom to i7, and is "processor-aware" to provide optimum performance.

Here's What Ira and Andrew Think. The claims here are impressive. We shouldn't lose sight of the fact that this is version SEVEN of the software, and many features and performance enhancements have been added to this mature platform over time. Radvision has been stuck in a competitive squeeze for a long time because the company does not manufacture group video systems, and its MCU-centric story has failed to motivate many resellers to lead with the Radvision product line. But, as the world turns towards desktop video, the company is in a much stronger position. SCOPIA desktop has many of the management and control features that customers will need for large scale desktop video deployments, and Radvision's embrace of SVC provides yet another significant performance advantage.

News in Brief

- Surprise, Surprise. Avaya has announced a new "fast track" program to attract Nortel resellers. Separately the company stated that KPMG Netherlands has chosen the company to supply IP-based communications infrastructure.
- We've been waiting for this to happen for a while – a service provider to offer a videoconferencing service based on scalable video coding. So, we're not surprised it finally happened, we're just surprised the announcement comes from someone we never heard of. Tiny Redmond-based CoroWare announced a service powered by Vidyo's SVC technology and product line. If you recall, the Vidyo architecture requires a "vidyrouter" to connect all endpoints, so any SMB has to figure in the cost of the endpoints (not very much) as well as the cost of the required infrastructure component. CoroWare, like any traditional "bridging" provider, lowers the up front entry cost for customers by providing a hosted, shared resource. CoroWare offers a broad spectrum of customized customer-focused solutions, including telepresence, unified communications, and robotics. How's that for a combination?

According to CoroWare, monthly pricing plans are based on the number of conference rooms, maximum number of attendees, and reserved number of attendee-minutes. As an example, a small business may want 1 conference room for up to 5 attendees and 1 hour per week. In that case, CoroWare would recommend a 5 attendee conference room for 1,500 attendee-minutes, which would cost \$135 per month. The \$69/month entry level plan is 1 conference room, 3 attendees, and 600 attendee-minutes. The per-minute pricing starts out at \$0.10 per attendee-minute and can cost as little as \$0.06 per attendee-minute if attendee-minutes are purchased in volume.

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- Tandberg and Dimension Data have teamed up with an enormous win (over \$20M for the reseller by our estimate) in the land down under. The two companies will provide upgraded core videoconferencing infrastructure for access by every school and TAFE in NSW as part of the Australian state's \$158 million Connected Classroom Project, a government initiative to provide Department of Education and Training staff and their students with new opportunities to connect with each other across enhanced facilities for sharing resources and data collaboration. A video system is being installed in every school. Under the terms of the contract, Tandberg and Dimension Data will deliver a solution with capacity for the department to securely connect 2,200 locations via multi-site high-definition video and audio conferencing. This deal involves 2,200 brand new 3000 MXP endpoints, 1600 SD MCU ports, and related infrastructure components – gatekeeper and streaming solutions. Let's hope the IP network provider can deliver! Always a challenge in Australia.
- 8x8 has joined forces with Aastra to roll out and support co-branded Virtual Office business IP phones, bundled with the 8x8 Virtual Office suite of services, at nationwide Office Depot retail locations. Aastra will supply the co-branded Virtual Office IP phone, while 8x8 provisions and manages the 8x8 Virtual Office hosted IP PBX service.
- SMART Technologies has licensed its patented DViT (Digital Vision Touch) technology and related know-how to PixArt Imaging of Taiwan. PixArt has been working diligently with a major Asian original design manufacturer to build ASICs that integrate touch capability in personal computers and laptops. This global license allows for high performance touch without the need for special tools. It is anticipated that products incorporating the licensed technology will be available in time for the holiday buying season in December 2009. Whoever said hardware was dead?
- Avistar has signed up DaVinci Video Solutions as a channel partner. DaVinci, with offices in the US, Europe, and Latin America, will offer Avistar C3 desktop videoconferencing to the satellite and specialized telco carrier market. In an unrelated announcement, Avistar launched "Visual Insights," a suite of embeddable components that allows application vendors to embed software applications with visual communications.

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Is this the time for your company to pull in its horns and cut spending to the bone, or should you be investing in cost-savings measures for the future – solutions that can help you do more with less, and improve your corporate stance vis a vis the environment at the same time? What are the trends that are driving the conferencing and collaboration industry and how will these affect






your ability to use these solutions in the future? How are the vendors and service providers preparing for the next five years, and how are other customers using solutions today?

These and other issues will be the focus of our event this year. Come listen, learn, interact, and contribute.

The two day conference at the Royal Sonesta Hotel on the Charles River will take place JULY 28-29. Whether you are a supplier, channel partner, customer, or industry guru, this is the one collaboration event you can't afford to miss. Visit Details at www.wainhouse.com/boston09.

A sample of some of the speakers and panel discussions scheduled for our 2009 event includes:



 <p>Edwin Craft and Tamela Smith Western Kentucky University Unified communications, videoconferencing, and advanced educational opportunities.</p>	 <p>Brent Kelly Wainhouse Research You've decided on unified communications: Now What?</p>
 <p>Sascha Hach Google Enterprise collaboration in the cloud.</p>	 <p>John Paul Williams Tandberg Beyond talking heads and thinking outside the box: the strategic value of video in business transformation.,</p>
 <p>Bill Haskins Global Crossing SIP trunking: is this networking scheme the answer to your dreams or part of your nightmares?</p>	 <p>John Bartlett NetForecast Business to Business Video over IP: Architecture Tradeoffs and Future Solutions</p>
 <p>Steve Bleiberg Johnson and Johnson Service creation and service delivery: Key issues in collaboration facing the large enterprise</p>	<p>PANEL DISCUSSION</p> <p>What do you really have to do to make your network ready for video? Where is the LAN/WAN technology now, and where will it be in 3-5 years. Is video over the Internet just a mirage? What will it take to make B2B a reality.</p>

More News in Brief

- BT has unveiled a network of three high definition telepresence demonstration centers where customers can compare telepresence systems before they buy. The new centers, in London, New York and Denver, showcase the telepresence systems of BT's partners, Cisco, Polycom and TANDBERG as well as BT's software applications. The centers also showcase BT Global Video Exchange, a service that allows Cisco TelePresence connections between different companies.
- NEC Unified Solutions launched UC for Enterprise (UCE) Collaboration, a video and web conferencing and collaboration application designed to help enterprises make meaningful remote contact with customers and employees alike. Hosted Collaboration, a web-based service offering the same features and functionality to small- and medium-sized businesses, is also available.
- Reality Check: Interesting entry on the VoiceCon UC eweekly blog.... the discussion was about SIP trunking, a technology being looked at for running end to end VoIP.... But no mention of video. Editor Eric Krapf adds that in a recent communication with analyst Tom Nolle of CIMI, Tom wrote that "Worldwide, packet voice generates 8.3 times the number of support incidents as circuit voice," with the data coming from his survey of global carriers. Food for thought.
- BT Conferencing announced that the company has successfully supported an exchange-to-exchange inter-company meeting in which both company's were using telepresence systems from Cisco. BT Global Video Exchange is a service that allows Cisco TelePresence connections between companies using different network providers. On the technical side, BT's Exchange service provides a shared resource plane that exists outside the MPLS network that securely passes video traffic between customer VPNs. This capability is provided by a pair of Exchange nodes deployed in London and Denver right now equipped with the appropriate routers and session border controllers.

Recent Research Notes on www.wrplatinum.com

The CTS 1300 from Cisco: At VoiceCon Orlando, Cisco announced a new telepresence system designed to support group meetings in multi-purpose conference rooms. Dubbed the CTS 1300 and priced at US \$84,900 (MSRP), this system includes a single 65 inch display, a single codec, and a three camera array housed in a single enclosure. The CTS 1300 supports up to six people (two per camera) in the meeting room, and uses voice activated switching (VAS) to send the image of the active two-speaker segment to the remote site(s). The system is designed to work with a 10 foot conference table (provided by the customer). This research note provides insight and analysis into the capabilities, pros and cons of this new offering.

Tandberg Demos 1080p60 High Definition At VoiceCon Orlando, Tandberg featured a technology demonstration in its booth - 1080p60 videoconferencing. High definition was introduced to the videoconferencing customer base four years ago, and over the past 2-3 years has become the dominant shipping technology. Although HD provides a superior video experience, it does so at the expense of bandwidth. This research note provides WR's opinion of this 1080p60 demo, information about the importance of resolution and frame rate, and insight into the role that 1080p is likely to play in the video enterprise.

WebEx Adds Advanced Video Capabilities Cisco announced the release of enhanced videoconferencing capabilities within its WebEx platform. Labeled "Advanced WebEx Video," this new feature adds high quality videoconferencing (including HD720p), interoperability with standards-based H.323 video systems, and interoperability with Cisco telepresence solutions. This means that WebEx users looking to include bi-directional videoconferencing to a collaboration session can choose between the legacy WebEx videoconferencing (supports up to 6 small, low resolution, low frame rate video windows) and the new Advanced Video capability. This research note provides insight and analysis into the value, pros and cons of this new capability.

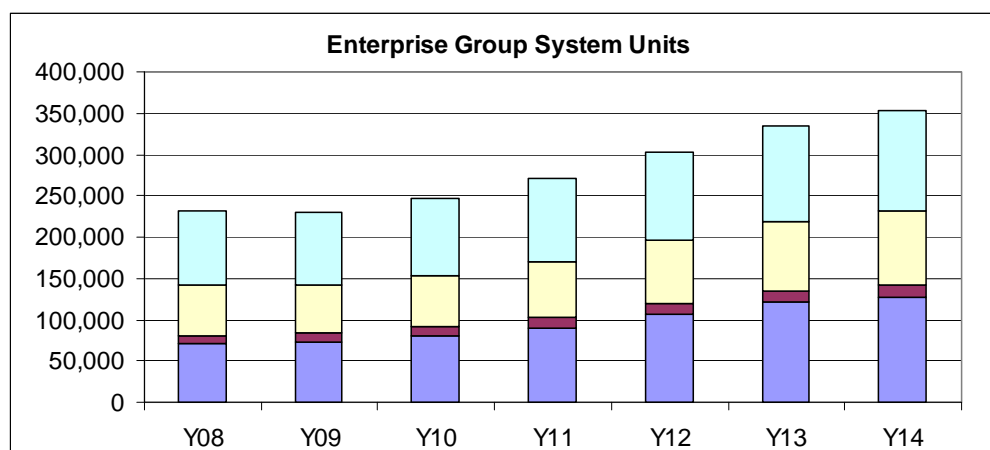
New WR Study: Asian CSP Markets Grow 25% in 2008

On the strength of audio and web conferencing, the Asia Pacific CSP markets surged in 2008. The release of [WR's Collaboration Services: Asia Pacific Forecast & Provider Review – 2009](#) indicates that region's growth is not taking the hit US service providers are. In fact, research points to accelerated growth among CSPs as demand for services increases due to greater awareness of the benefits of real time communication and on-line collaboration. The report is largely quantitative with current and future data on volume and revenue of services in the AP market. It is divided into two parts: 1) Local country analysis on 6 markets, current year sizing and 5-Year forecast, and provider rankings by service, 2) Summary review of over 40 providers.

Specific qualitative information as it relates to a particular organization may be discussed with the author upon purchase of the study. For more information on this and other CSP-related reports, please see www.wainhouse.com/csp or contact Sara Fargo at sfargo@wainhouse.com or +1 781 934 6165.

New 5-Year Videoconferencing Forecast from Wainhouse Research

WR has published its annual 5-year forecast for the videoconferencing industry. Part of the firm's Rich Media Conferencing Series, an annual report on the industry, the forecast provides data by region and by product type, including single and multi-codec room systems (telepresence), executive systems, and personal videoconferencing. Contact Sara Fargo at sfargo@wainhouse.com for details



Event Calendar

Conferencing & Collaboration Events	
When & Where	Who & What
June 17-19; Orlando, Florida, USA	IMCCA at InfoComm
July 28-29; Boston, MA, USA	Wainhouse Research Collaboration Futures Summit
October 11-14, Anaheim, CA USA	Polycom User Group Annual Conference
October 26, Boston, MA USA	Wainhouse Research CSP Summit
April 20-21 2010, Berlin, Germany	Wainhouse Research Collaboration Summit

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