

NEWS AND VIEWS ON REAL-TIME UNIFIED COMMUNICATIONS

With over 800 exhibitors braving the heat last week in Orlando, we made hardly a dent in trying to see all that was new and exciting in the world of AV and rich media communications last week. We did try to focus on the videoconferencing and streaming end of the world however, and so our report below is a bit visual-collaboration-centric. Apologies to all our readers more concerned with UC and VoIP, but InfoComm has become the place to be to see dozens of videoconferencing, streaming, and telepresence demos.

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Andrew W. Davis, andrewwd@wainhouse.com

InfoComm Retrospective – the GAME CHANGERS

Ira and I saw dozens of demos and new product introductions at InfoComm, but we'd like to start our report with comments on what we think are four game changers – technologies or trends that could shape the future of the rich media communications/videoconferencing industry.

1. Scalable Video Coding

While **Vidyo** first began shipping H.264-SVC (H.264 Annex G) videoconferencing systems well over a year ago, SVC has started to move into the mainstream in our humble opinion. The biggest SVC noise at InfoComm was in the **Teliris** booth where the company introduced its 6th generation telepresence product line, with all of its 1, 2, 3, and 4 screen systems using an all-software SVC codec based on SVC technology licensed from Vidyo. True to its roots, Teliris chose not to emphasize the technology or features of its system, but to focus on customer benefits. The primary benefit touted by Teliris is the ability for customers to use general purpose (read non-QoS) networks for their videoconferencing needs, thereby saving up to 40% in monthly network costs. Other 6th generation features included a modular hardware design that speeds up room installation to less than one day according to the company. Teliris is offering an upgrade path to all of its existing customers, and it looks like the payback for the upgrade is less than 6 months given the reduction in monthly operating (network) costs for the new SVC systems. During a press conference, super-secretive CEO Mark Trachtenberg mentioned that since May 1, 2009, when the company began demonstrating the new platform to customers, Teliris has booked orders for 130 room systems. Teliris also announced a partnership with **iFormata** to provide interoperability and B2B services.



Radvision announced its new ACTA-based MCU hardware platform, dubbed SCOPIA Elite. Utilizing the latest in DSP technology, SCOPIA Elite delivers 1080p processing, dynamic resource allocation and individual video layouts for each participant. SCOPIA Elite 5000 is the centerpiece of the Company's new and comprehensive SCOPIA V7.0 next generation conferencing solution. The Elite 5000 MCU delivers 10 to 30 ports of HD continuous presence

capability, and up to 120 ports of non-HD or voice-switched connectivity. (The actual flexible capacity calculations of the MCU for SD, 720p, and 1080p is beyond the scope of this newsletter article). Buried in the announcement is the fact that the MCU supports H.264-SVC; no surprise since the company announced an SVC-capable SCOPIA desktop client just a few weeks ago. The system can also act as a “gateway” between SVC and AVC (traditional) conferencing systems.

We remind readers that Radvision’s implementation of SVC and Vidyo’s implementation do NOT interoperate. The older SCOPIA platform, shown in the photo with the new system, will continue to be offered.

Here’s What Andrew and Ira Think. Scalable video coding could indeed be a

game changer. It is not clear whether SVC actually reduces the bandwidth required, but it does appear to eliminate the need for expensive QoS networks to host video. If that is indeed the case, then SVC could help enable the wide scale adoption of videoconferencing solutions – to homes, remote offices, and even third-world locations where QoS (and sometimes bandwidth itself) is either not available or is prohibitively expensive. In fact, SVC could be a game changer for both the videoconferencing industry and for the network providers. On the other hand, SVC has raised some controversy, with several CTOs suggesting to us that the benefits are not what they seem, and that other solutions are preferable. Wainhouse Research is about to delve into this issue further – we are beginning a serious technical investigation via a report focused NOT on how its done, but what it really delivers. Stay tuned.

	Ports	MSRP
SCOPIA Elite 5110	10 HD ports	\$57,000
SCOPIA Elite 5115	15 HD ports	\$84,000
SCOPIA Elite 5230	30 HD ports	\$165,000
Capacity license for Elite 5110	40 ED ports	\$15,000
Capacity license for Elite 5115	60 ED ports	\$22,500
Capacity license for Elite 5230	120 ED ports	\$45,000

2. Consumer Electronics Giant Entering Videoconferencing Market



Tandberg T1700 MXP,
MSRP ~\$8K



Samsung VC 240
MSRP ~\$2K

Ok, Ok, I know – consumer electronics giant (CEG) Sony is already in the market, and CEG Panasonic exited the market years ago. But at Infocomm this year, Radvision and Samsung announced and showed a jointly-developed HD desktop videoconferencing system dubbed the VC240. The device can operate as a standalone HD-capable desktop videoconferencing device and as a 24 inch high-res computer monitor. The VC240, a Tandberg 1700 MXP and Sony TL33 look-alike, supports client-client standards-based video calling and is also fully interoperable with RADVISION’s SCOPIA line of products.

Here’s What We Think. Over time, these “executive” systems have become increasingly interesting. But can either of these two partners sell the VC240? That, of course, remains to be seen. At an MSRP of ~\$2k, putting these Samsung devices into Best Buy, Staples, Media-Saturn, or RadioShack isn’t likely to be the way to go. In addition, Radvision’s presence in the cable community or CSP market has waned over the past few years. But, but, but.... Don’t count anything out just yet. The VC240 is the first low cost appliance to link seamlessly to Radvision’s powerful SCOPIA infrastructure, to be compatible with H.323 devices, and to support SVC at the same time. Given the right sales, marketing, and distribution strategy, this could be a recipe for success. SMB customers and service providers take notice. Will Samsung turn on its marketing engine? Time will tell.

3. Falling Prices for HD Videoconferencing

Desperate to take away **LifeSize's** price/performance leadership in the HD space, multiple vendors have introduced amazing new videoconferencing systems with 720p and even 1080p support at rock bottom prices. At the show, **Polycom** introduced the HDX 6000 (\$6K MSRP) claiming 720p30 at 832 kbps and DVD quality video (704 x 576 x 30 fps) at just 256kbps - an incredible sweet spot for enterprise video users. The low priced unit does not support 1080p. The HDX 6000 price includes Polycom's EagleEye 720p camera with 12x zoom and support for 720p content display resolution with WSXGA input resolution. Not to be outdone, **Tandberg** introduced the C20 incorporating slick new packaging and a new microphone pod. The device leverages the user interface from the more expensive C60 and C90 systems. The base C20 (\$7900) includes a 4x zoom camera that can support 720p at 30 frames. A resolution software option (\$3K) takes it up to 1080p30; the dual display option adds \$2K. The C20Plus system includes a 12x PTZ camera that can support 60 frames at 720p as well as 1080p30. H.239 is standard on all C20 systems. Other videoconferencing systems in this price category include the **Aethra** Xtreme systems which we covered last week - \$7,500 entry price point with support for 2nd monitor and H.239, \$9,000 for 720p60 support and a Sony camera, and \$14,000 with 1080p30 capabilities. We also have the **Sony** PCS XG80 (\$9K list for 1080i system plus \$2K for data sharing software), which has become the mainstream product for the CEG with the TL50, TL30, TL33, G90, and PCS-1 no longer available. So, back to the "LifeSize as Target" concept. What are these other guys shooting at? LifeSize's most recent announcement was Express 200 (\$6K with fixed focus camera and \$7K with a 4x PTZ camera) that supports 720p60 decode and 720p30 encode. Indeed, customers have lots of choices in the HD arena these days.

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4. The Demo to End All Demos

Too bad this was off the show floor in a breakout room. What I saw was truly breath-taking. Picture this: On the stage are a male and female singer performing a neat duet. Oh yes, the female and the musicians are in London, and the male is there in the room in Orlando (I had to ask to verify this.) But with 3-D holographic videoconferencing, you couldn't tell who was where, or rather, more to the point, they both appeared to be there in the room together. Put together by a team from illusiotechnologies, musion, Christie Digital (projection), AVconcepts (lights and staging), Masergy (20 Mbit QoS pipe) and Haivision (10 Mbit low latency MPEG codec), this was something you had to see to believe. The 190ms round trip latency meant the performers could synch words and music perfectly, while the video effects combined to give a whole new meaning to the word "telepresence." After the musical performance, we had an interactive Q&A session with the participants on both sides of the pond. Could this be a sign of where the technology is going and where some future applications might lie? Maybe, maybe not. The demo did require carefully controlled lighting and careful room layout (doesn't every theater?). Nevertheless, hats off to the team that put this together.

More Infocomm News in Brief

- The IMCCA hosted two days of seminars, presentations, and panels focused on conferencing, collaboration, and telepresence. Highlights included presentations from Rick Snyder (Tandberg – President, Americas) and Bob Hagerty (Polycom – CEO and President), and a "Meet the Experts" panel session moderated by WR's Ira Weinstein. We thank the IMCCA for including WR in this event.

- Mirial launched the new Mirial Softphone for Apple Mac OSX platform – now supporting SD and HD (up to Full-HD 1080p) videoconferencing. This software can communicate with any standard SIP or H.323 system, not just other Mac machines.
- Tandberg announced 1080p support on the Codian HD MCU family via a software upgrade in early Q3; a new version of the company’s amazing telepresence server, now available in a pizza box form factor (mushrooms and onions are optional extras), and a partnership memorandum with the ubiquitous BT and BT Conferencing. The enterprise-wide and business-to-business collaboration is made possible by BT’s One Source managed services and MPLS network and the expansion of BT Global Video Exchange with TANDBERG’s infrastructure (read telepresence server). Tandberg was also demonstrating some of the features and benefits of the C90 codec with its embedded compositing capabilities. For example – individual transcoding with a dedicated compositor for each remote participant is used to avoid participants seeing themselves in a multipoint call and to adjust the layout depending on the capabilities of the receiving system. The capabilities of the C90 are so vast and so imaginative that Tandberg has published a little book with diagrams and examples. In addition, Tandberg demonstrated telepresence interoperability between its T3 solution and a 2-screen Polycom RPX solution.
- LifeSize announced LifeSize Desktop, a client-client (yes, this is NOT client-server) desktop videoconferencing software product leveraging technology licensed (and previously announced) from Avistar and supporting 720p30 receive and 480p30 send at about 1 Mbps. The SIP-based product was designed to minimize processor utilization while providing a simple, easy-to-use experience. According to the company, “feature-creep” was intentionally avoided during the design stages to meet customer requests for a product that would require minimal user training and minimum technical support in the enterprise.
- SMART Technologies announced SMART Hub VE220 (\$1200) digital whiteboarding appliance, the latest in its line of meeting-room and collaboration appliances, which also includes SMART Hub SE240 and PE260 collaboration platforms. Designed to bring whiteboarding into the digital age, SMART Hub VE220 connects to a meeting room’s projector and interactive whiteboard to enable sharing of digital materials from a laptop, taking digital notes, drawing diagrams, brainstorming and saving work for easy reference and distribution. The appliance manages the projector and interactive whiteboard to ensure a walk-up-and-use experience. The company also introduced the SMART Board 685ix interactive whiteboard system – a high-definition, high-performance collaboration tool that virtually eliminates shadows, glare and projector light in the eyes. The fully integrated system comprises a SMART Board 685 interactive whiteboard and the new wall-mounted, ultra-short-throw UX60 widescreen projector with a 16:10 aspect ratio and WXGA resolution (1280x800). You have to see this one to believe it.
- Cast Labs has extended its IP Videomail services to Blackberry devices.
- Accordent introduced a new version of its media management system. Based on an entirely new architecture and .NET technology, AMMS 3.0 provides a host of new features including improved security and scalability and multi-tenant support (making this streaming management system service-provider friendly).
- Sonic Foundry demo’d a new version of the MediaSite content capture and management platform. Version 5.1 includes a variety of new features including new embeddable, Silverlight-powered players, automated closed captioning, and enhanced scheduling including the ability to import schedules from 3rd party systems.
- TelePresence Technologies showed a new version of its 3-D telepresence system incorporating an 82-inch LCD monitor from Samsung. This is big enough to handle more than 3 persons.
- AVI-SPL’s ConferencePoint, powered by Glowpoint, was used in a demo of the telepresence exchange network that connected multiple endpoints from multiple vendors across multiple networks in a single video call.

- Konftel was previewing the 300W wireless conference phone with rechargeable battery and support for DECT.
- Avistar showed the C3 Media Engine, the latest component from its video solutions platform. This component addresses a key need among the technology community: how to best integrate high quality, scalable video and audio conferencing as part of the UC experience on the desktop, while seamlessly enabling any software application or web page with reliable, scalable visual communications. This company has really come a long way since Simon Moss took over as CEO. While still very much involved in the socially-untouchable business of patent and IP licensing, Avistar has turned itself into a videoconferencing software house – providing modular solutions to the channel partner community as well as components for others (like Citrix) to embed in their web pages, services, or enterprise business applications.
- Besides Mirial, other people showing Macintosh clients for video at InfoComm included Vidyo and IOCOM.
- Iformata signed a partnership agreement with Teliris to provide visual collaboration interoperability. The company also showcased its new VNOC Symphony platform for enterprise video communication management. Built on a web-oriented architecture, VNOC Symphony's framework provides users the option of scheduling meetings using multiple interfaces, such as Microsoft Outlook, Lotus Notes, an intuitive web interface, an animated Microsoft Silverlight interface, among others. Within several weeks, interface offerings for Apple's iPhone, Microsoft OCS, and the Blackberry will also be available. We saw the demo and it was indeed impressive. At the heart of the platform is an engine called VNOC Conductor which polices meeting setup, maintenance, and teardown in an enterprise environment according to an organization's process rules. Numerous parameters are configurable to ensure departmental or global directives are followed, including setup times, startup messaging, teardown messaging, in-progress meeting modification messaging, custom messaging, remedial functions, escalation processes, email and SMS notifications, charge-backs, conflict management, and many other processes that regulate a complex enterprise deployment. Numerous tools are available to users and administrators in the form of widgets, which are interacting web services that communicate with VNOC Symphony's framework.
- Magor, a Terry Mathews-backed Canadian company, introduced a line of “telecollaboration systems” at the show. What the company really ships is a “telepresence” software kit supporting 1080p H.264 video and running on commercial, off-the-shelf hardware. Channel partners put it all together for customers, a business model followed by at least two other players in this space. Magor has signed up industry veterans HB Communications as a North American reseller, and



Saudi Delta Company for the Saudi market. We got a quick demo of the system at InfoComm. The design appears to be very focused on collaboration, and the interface is on the techie side, more like a traditional videoconferencing system than a 2009 “telepresence” system (in our opinion). Magor claims to require less bandwidth than competitors and that their solutions do not require expensive, dedicated network services. One interesting tidbit: the cameras are located near the bottom of the screens for improved eye contact.

- Digital Video Enterprises (DVE) showed the Eye Contact Silhouette, a new product including a 26” broadcast quality, high contrast LCD display designed to be used with any personal / desktop videoconferencing system. The company also showed a zero-bezel version of its Huddle product with the REALroom 3D option allowing an image of participants to be presented in the middle of the 3D physical space.

- Cisco had an interesting “presence” at InfoComm, touting custom telepresence design and integration by IVCi and Cisco. Looks like Cisco has moved off its “one size fits all” approach to telepresence customers and is teaming with experienced AV videoconferencing partners to deliver a variety of solutions customized for government, business, entertainment and educational needs.
- Business Octane caught up with WR at the IMCCA Telepresence Day and presented its telepresence product line. Although the solutions are currently available only within India, the company plans to deploy demo sites in 10 US cities and establish partnerships to sell globally.
- Digital Rapids gave the 1st official demonstrations of TouchStream; a portable, self-contained capture appliance with a touch screen user interface, integrated live video monitoring, video noise reduction, and configurable encoding formats. TouchStream is available in three flavors; an analog (SD) model for \$4k, an SDI model for \$7k, and an HD/SD model for \$10k.
- VBrick demonstrated its recently released Rich Media Studio, a software-controlled, multi-input, video and data (XGA) capture device. Key features include the ability to combine the live video and content signals into a single rich media stream for live distribution, thus eliminating the need for a separate web server to host and distribute the web content.
- Crestron, one of the anchors of the Infocomm show, made a series of product announcements including three that caught WR’s attention. The first involved enhancements to the company’s RoomView centralized A/V management platform in the areas of scheduling and pro-active device monitoring and management. The second was the release of Crestron DigitalMedia, a series of products that provide full HDCP compliant switching and distribution of HDMI, DVI, and DisplayPort , as well as analog audio and video and high-res RGBHV signals, USB, and Ethernet over twisted pair cabling or fiber. The third was the announcement of their partnership with Texas Instruments incorporating native RoomView monitoring with emergency broadcasts and Crestron control in DLP projectors.
- Revolabs announced single and dual channel versions of its HD-series wireless microphones (MSRP of \$395 and \$595 respectively – excluding the required HD wireless microphones). Key features include support for wide-band audio (50 Hz to 20 kHz), basic audio equalization and mixing, and the company’s RF Armor technology which protects the microphone audio from GSM noise from cell phones. WR has already evaluated [Revolabs’ Fusion Wireless Microphone System](#), and expects to evaluate the HD-Series in the near future, so stay tuned.

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News in Brief

- Avaya and IBM announced an expansion of their alliance to deliver UC solutions backed by newly certified security products for enterprise clients and government organizations worldwide. The two companies also plan to focus support on Avaya Aura – Avaya’s new UC architecture.
- Italy-based systems integrator Videoworks, in collaboration with Poltrona Frau, has introduced an unusual “telepresence solution.” Based on codecs from LifeSize, this system uses video screens that can fold down into the table to turn the telepresence suite into a traditional meeting room (see photo).



- Agito Networks announced Agito for BlackBerry, a solution delivering VoIP and UC to users of the BlackBerry smartphone. Agito Networks' solution extends VoIP, UC and PBX functionality to BlackBerry users over the WLAN, while also extending these capabilities across the cellular networks. Previously, BlackBerry users were able to access UC and PBX functionality – such as one enterprise number and voicemail, extension dialing, conferencing, directory query and more – only over the cellular network.
- Polycom is allowing companies to host a meeting using the company's 22 telepresence systems. No cost, no hassle, and no travel. Telepresence is something you have to experience to understand. Kudos to the company for launching a marketing campaign around this offer.
- Unrelated to Infocomm, Global IP Solutions (GIPS) announced support for a Scalable Video Coding (SVC) implementation of H.264. With H.264 SVC integrated inside GIPS video engines, videoconferencing providers can offer high video quality using the minimal bandwidth by adapting to each user's available capacity. With GIPS's SVC implementation, multipoint calls will enable different users to connect according to their bandwidth without downgrading any other participant's experience. In addition P2P video calls have improved error resilience.
- Adobe will start charging subscribers to its acrobat.com collaboration web site. Two subscription services of \$15 and \$39 per month accommodate different size group meetings. It also added a preview version of Tables, a shared spreadsheet application, to the site's current lineup, which includes Buzzword, for words; ConnectNow, for virtual meetings; Create PDF/Share, for just that; and the preview of Presentations, which allows collaborative construction of, yes, presentations. Acrobat.com has acquired about 5 million subscribers since the beta launch last year.

Alan Moskowitz (1959-2009)

The videoconferencing industry lost a true friend and one of its most seasoned professionals when Alan Moskowitz passed away on June 1st. Alan focused his entire career on his customers' satisfaction. He began his career in conferencing over nine years ago as a Sales Engineer with CUseeMe Networks and continued to support his customers through CUseeMe's various technology and company changes up to his position as AVP of Support at RADVISION. He dealt with his customers with integrity and professionalism and they always knew they were receiving the best support in the business. Alan could always find a way to "make it work". Alan's life and passing will have a long lasting effect on the industry, including his colleagues, customers and competitors. He was a dear friend, a mentor and part of the industry's extended family. Outside of work, Alan was a dedicated husband, father and grandfather to his wife, 3 sons and 2 grandchildren. He will be deeply missed by all who knew him.



Twitter Bootcamp at the WR Summit

Are you Twitter-clueless? WR has made special arrangements with the Cool Blue Company to offer their 90 minute Twitter Bootcamp right after our networking/cocktail reception the evening of July 28. The Twitter Beginner Boot-Camp is aimed at bringing individuals up to speed on the basics of Twitter and its potential applications. During the class, you will learn how to setup your account and configure your profile and phone, how to find individuals and companies to follow, how to use Twitpic to take pictures from your phone and post them on Twitter, how to use Twitter for real-time search and for applications such as real-time brand management. The specially reduced Bootcamp registration fee for summit attendees is \$75. [Register here.](#)

Mark Your Calendar: July 28-29 in Boston

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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? Come listen, learn, interact, and contribute.

The two day conference at the Royal Sonesta Hotel will take place JULY 28-29.

If you can't make it to Boston this year, do the next best thing and [attend via an interactive webcast](#). Through our partnership with ON24 we will webcast the Summit sessions in real time. Archives will be available as well.

Whether you are a supplier, channel partner, customer, or industry guru, this is the one collaboration event you can't afford to miss. Full details at www.wainhouse.com/boston09.

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Bob Fine
 Cool Blue Company
 Understanding the value of Twitter for real-time brand management, sales development and collaboration applications.



Andrew Davis
 Wainhouse Research
 Conferencing in 2020: Discontinuities Ahead



Don Mastro
 AVI-SPL
 It's 2014. What does your Visual Communications implementation look like?



Stuart Bowen
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 The Future of Virtual Shows: The real deal or real hype?



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Andy Nilssen
 Wainhouse Research
 Virtual Teaming: Where are we now and where are we going?



Ben Krokosky
 Compunetix
 Giving Voice to a New Wave of Collaboration

PANEL DISCUSSION

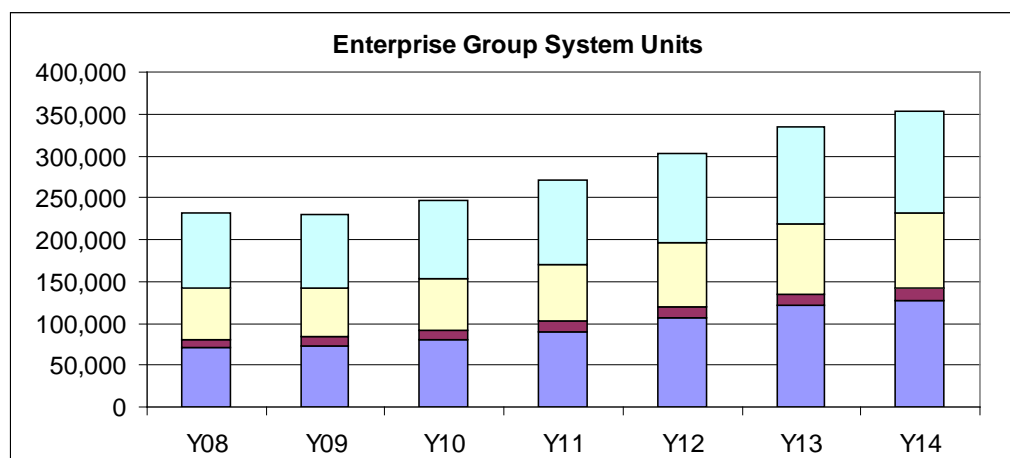
Video over IP: Where are we now, and when will the network services really be here? Is B2B a pipe dream?

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 provides 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. 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
July 28-29; Boston, MA, USA	Wainhouse Research Collaboration Futures Summit
16 September, Zurich, Switzerland	Point Nine : Using Video beyond the Corporate Network
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

People & Places

Aethra, **Celso Nunes**, Latin America Sales

AVI-SPL, **Mike Brandofino**, EVP of Video Communication and UC

Scalable Display Technologies, **Andrew Jamison**, CEO

SEK Solutions, **Kirk Dennis**, Director of Video Innovation and Technology

Tata Telecommuincations, **Greg Brophy**, Director TelePresence Product Management

Siemens Enterprise, **Mark Stone** (of the Gores Group), CEO, replacing **James O'Neill**

ClearOne, **Dave Petricig**, VP North American Telephony Sales

Letters

Andrew: While we appreciate your identifying Coroware as a VidyoConferencing CSP, they are by no means the first, nor the only one. We have 10 CSP's - some of that have previously been announced. AttendAnywhere has been delivering services for over a year. We have announced Videra, Chardin, Emperion, and VideoCall in prior releases. We have three other US CSPs who are from the videoconferencing arena - IDSolutions, Conferencing Advisors and Connexus. We expect to have some additional announcements in this arena very soon as the flow of CSPs who want to base a service on VidyoConferencing continues to expand, and we'll make sure we share these with you ... marty@vidyo.com (Marty Hollander)

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