



The Wainhouse Research Bulletin

NEWS AND VIEWS ON REAL-TIME UNIFIED COMMUNICATIONS

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News in Brief

- Announced long ago, the Tandberg PrecisionHD USB Camera is now available, list priced at \$399. Designed for business users, the Tandberg camera requires no drivers, supports 16:9 aspect ratios, and includes a “video mute” feature for those camera-shy moments. Other interesting claims that we have not yet been able to verify include high quality glass optics, a field-of-view optimized for personal conferencing, and automatic adjustment to light levels.
- Logitech announced its Logitech VID service has registered its one millionth account.
- Polycom has opened its first publicly available Regus telepresence suite - in London's Berkeley Square - equipped with Polycom's RPX system as part of an initiative with Cable & Wireless.
- IVCi received Cisco's Telepresence ATP status.
- eBay has sold a 65% interest in Skype to a group led by Silver Lake Partners (Avaya, AVI-SPL investors). The math, which was not especially straight-forward to follow, apparently values Skype at \$2.75 billion, not far below the \$3.1B eBay paid for Skype in 2005. Other figures of note: Skype ended July-09 with 480 million registered users, up from 276 million in less than 18 months; Skype claims 34% of calls between Skype users include video.
- Advanced Media Design (AMD), developer of MediaPOINTE, has announced an exclusive value added relationship with Aethra. AMD now distributes the entire Aethra video communication suite of products.
- Phoenix Audio has introduced the Quattro2, an improved version over the original Quattro. Key features include a programmable external microphone jack, on-board reprogrammable memory, and soft dialing.
- Another global alliance around videoconferencing support for global customers has been formed. The OnePresence Alliance involves Vantage Systems (Australia), Videocall (UK), and York Telecom (US). The goal is to facilitate telepresence and visual communications requirements of today's international organizations. By combining business, product, and service strategy with fundamental technical expertise, the three intend to provide technology, managed services, strategic consulting and end-to-end communications solutions worldwide. We're trying to get additional details on the meat behind this announcement and how customers will benefit. Stay tuned.

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- One state down, 49 to go. Wainhouse Research has completed a strategic consulting project to the State of Wyoming on its many applications of technologies for distance education. The project included a needs assessment, gap analysis, recommendations, inventory, focus groups, interviews, and survey, and has resulted in a series of programmatic and technological recommendations to the state. WR served as prime contractor and partnered with CILC and Pine Cove Consulting. Pictured here are Brandon Vancleeve (PCC), Monica Cougan (CILC), Wyoming Governor Dave Freudenthal, Alan Greenberg (WR), and Rick Vancleeve (PCC). The report is [available here](#).



- More is happening in the public “telepresence suite” space. Tata Communications has inked a deal with the Starwood hotel chain. So now we have HP-Marriott; Polycom-Regis as well as Tata-Cisco-Starwood. Tata has an ambitious business plan that involves delivering services directly to videoconferencing customers as well as working with other carriers to provide behind-the-scenes network connectivity and concierge services.
- We recently completed our annual videoconferencing user survey – see one of the results below. Winners chosen at random received a gift certificate to Amazon.com as well as a donation to the charity of their choice. This survey’s winners were Dennis W, Providence Health & Services; Norm T, Canada Revenue Agency; Isaac F, ReedSmith; Garner B, ScanSource; Anthony C, GBH; Communications; Alexandr S, EMAG; Odair T, Solutione Brazil; Chris K, Chevron; Rick J, Cargill; and George H, Advocacy Center for Persons with Disabilities. Charities receiving donations included American Friends Service committee, Ottawa humane society, Pittsburgh Lesbian & Gay Film Society, Susan B Komen Foundation, ASPCA, Wikimedia Foundation, Juvenile Diabetes Foundation, American Red Cross, Children's Miracle Network, and Second Harvest Food Bank. Thanks to all who filled out our 2009 survey.
- Vidyo has formed an alliance with UK-based First Connections Limited to introduce a new hosted videoconferencing service, FirstConnect, that is based on VidyoTechnology. In what appears to be a totally unrelated development, Vidyo announced that Cranfield University, a postgraduate institution in the UK specializing in science, technology, and management, has deployed VidyoConferencing as a key component of the University’s communications system. The deployment was made possible through the University’s Integrated Vehicle Health Management Center.
- Global IP Solutions (GIPS) announced that Yahoo! Messenger is using GIPS VideoEngine to enable video calling with the launch of Yahoo! Messenger 10. Yahoo has been using GIPS technology for voice since 2006.

WR CSP Summit – Boston 2009

When: Monday, October 26, 2009

Where: Hilton Logan Airport, Boston, MA

Agenda, details, and registration:
www.wainhouse.com/cspsummit

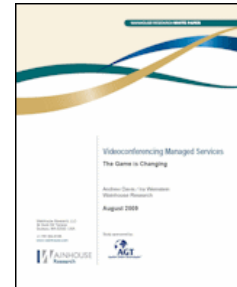


For the past seven years the Wainhouse Research CSP Summit has brought together collaboration and conferencing service providers and their partners to connect and explore this rapidly changing market. *The Changing Landscape – How to Capitalize on New Markets for Collaboration Services*, will be the theme for this year’s event as attendees and featured speakers probe such topics as: 1) emerging web conferencing features like speaker localization and HD audio; 2) capitalizing on the skyrocketing market for managed video services; 3) managing disruptive entrants such as Google & Skype; 4) driving new business through mobile services.

The conference is limited to an intimate group of service providers and solution partners to foster the discussion of strategies for integrating new technologies, developing new services, and spurring growth. After a day of presentations by industry leaders, the conference will conclude with a networking cocktail reception. Space is limited and the CSP Summit consistently sells out. Register now at www.wainhouse.com/cspsummit.

New Whitepaper from Wainhouse Research (FREE)

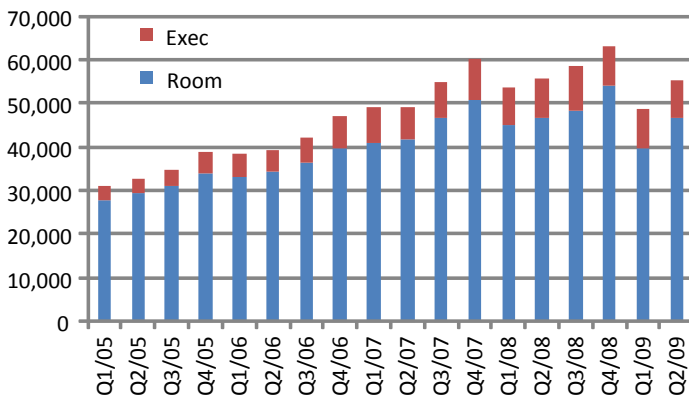
Over time, many organizations have realized that videoconferencing can be quite complex, and that supporting a videoconferencing service is not core to the enterprise’s expertise or business model. Hence, many savvy organizations are looking to managed service providers with videoconferencing expertise to support their environment. Videoconferencing Managed Services – the Game is Changing, sponsored by Applied Global Technologies (AGT), discusses the three game changing factors that video MSPs are using to deliver benefits to organizations using videoconferencing. Get your free copy at www.wainhouse.com/whitepapers.



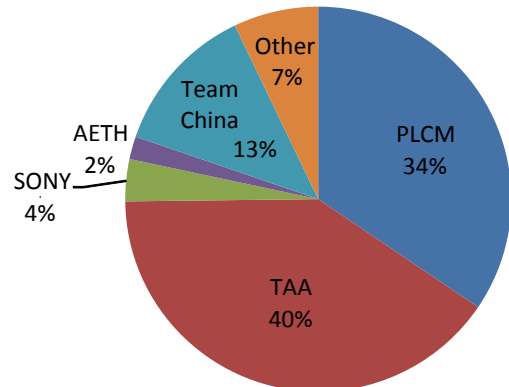
Q2-09 Videoconferencing Industry Statistics

Our Q2 SpotCheck report on the global videoconferencing industry is out. For details on how to subscribe, contact Sara Fargo, sfargo@wainhouse.com. For Q2, total revenues were down over 6% annually, but up sequentially. The global economic slowdown however has had very different effects on the different videoconference vendors.

Videoconferencing Units (WW)



Videoconferencing Revenues



Quiz of the Week:

What do all these people have in common?
Can you name the team?



People & Places

AVI-SPL, **John Vitale**,
Dir. of Product Management

Avistar, **Stephen Epstein**,
CMO, head of sales & marketing

Compass Business Solutions, **Julie Trono**, President

Haivision Network Video, **Mahmoud J.**

Al-Daccak, SVP Engineering

Salesforce.com, **Doug Dennerline**, EVP Sales

Vaddio, **Andrew Berger**, Broadcast Product Manager

Event Calendar

| Conferencing & Collaboration Events | |
|-------------------------------------|--|
| When & Where | Who & What |
| September 16, 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 |

Wainhouse Research Happenings

Using Videoconferencing Beyond the Corporate Network

Sold Out



When: Dinner 15 September
Conference 16 September

Where: Zurich, Switzerland

The next meeting of the end-user, peer networking group will explore the barriers to connecting beyond the corporate firewall and using tools such as videoconferencing to communicate with suppliers, customers and partners.

Our one-day meeting in Zurich will host strategic managers at major multi-national organisations speaking on the challenges they face and solutions they have implemented. In addition, leading solutions providers and industry experts will share their thoughts on how the industry is facing up to these challenges and what solutions are available for the enterprise. The meeting includes a technology showcase; participants will also gain an insight to the solutions being developed by a major 'Conferencing-in-the-Cloud' solutions provider.

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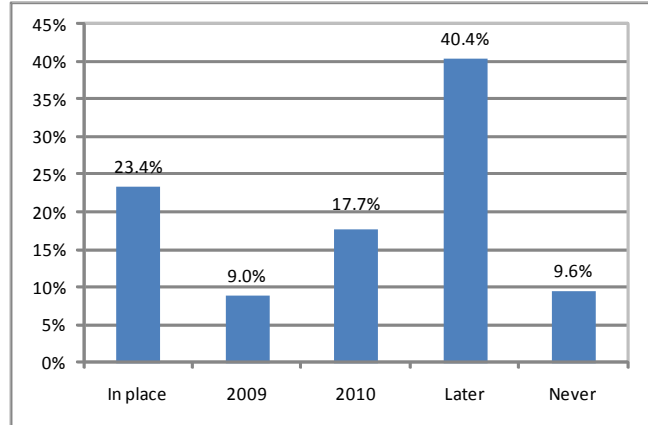
Three New Survey Reports

Three recently published survey reports from WR cover Enterprise Social Networks, videoconferencing usage and plans, and end user trends related to the use of conferencing service providers. For more information on any of these reports, visit www.wainhouse.com/reports or contact Client Services Manager Sara Fargo at sfargo@wainhouse.com, +1 781 934 6165.

ESN survey

sample question:

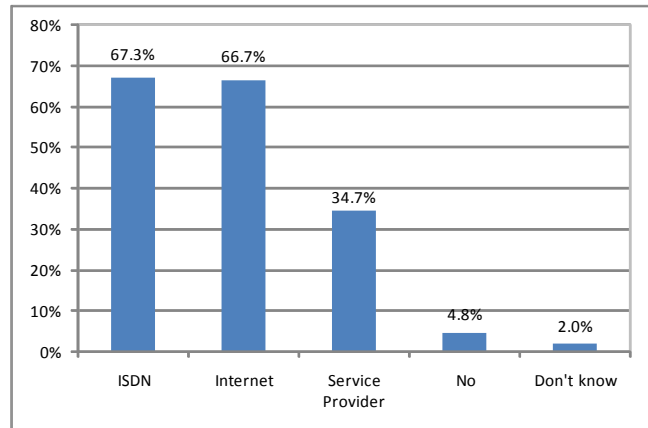
Expected time frame for deploying inward-facing enterprise social network solutions



Videoconferencing survey

sample question:

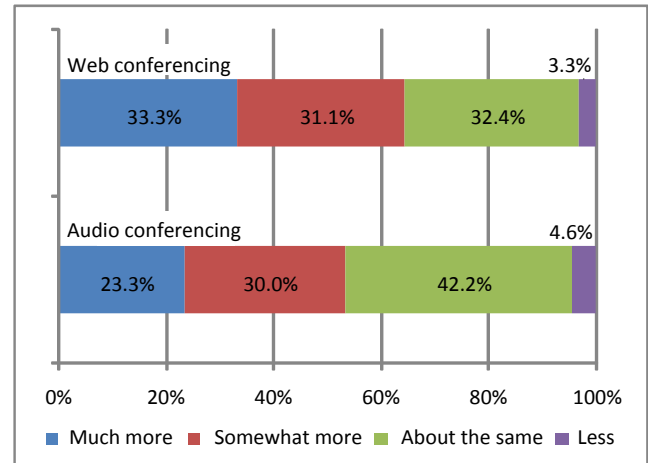
Solutions in use for B2B videoconferencing



Conferencing Services survey

sample question:

How end user customers have changed their use of conferencing services since last year.



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