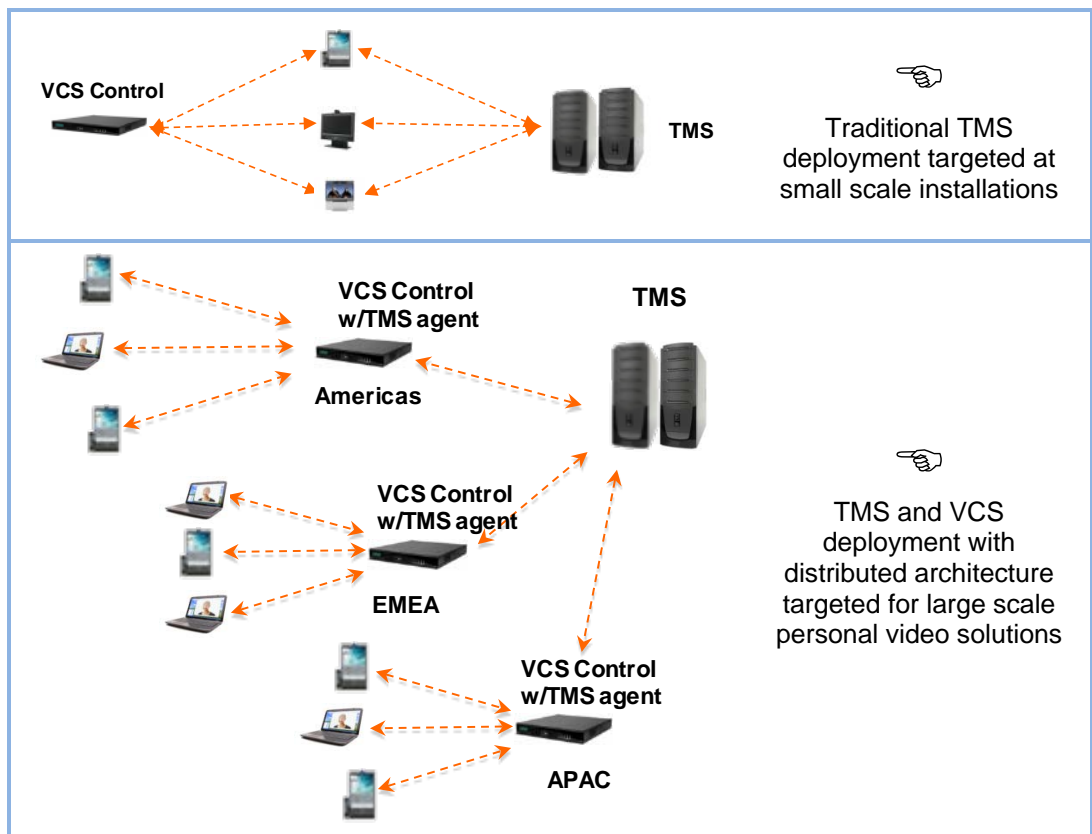


Tandberg Intro's Large Scale Provisioning

Tandberg has updated its TMS and VCS software to support what the company is referring to as "large scale provisioning." While we wouldn't ordinarily call release 12.5 of someone's software a major announcement, this time it's different. Large scale provisioning addresses a major industry challenge – automating and speeding the deployment of personal videoconferencing solutions so that your friendly IT department can actually contemplate deployments of hundreds or thousands of endpoints. According to Tandberg, with the company's E20 or Movi endpoints, deployment requires only four steps, as follows:

- Administrator imports active directory into TMS
- AD synchronizes with TMS automatically creating new user profiles and FindMe addresses
- TMS generates and sends automated e-mails to new users with username and password
- New users receive E20, enter username and password and are up and running

We saw a live demo of this recently with a virgin E20 pulled out of the standard shipping container. Indeed, it took more than 30 seconds to set up (power and Ethernet cable), but less than 90 seconds, and in about 2 minutes we had our first video call (transatlantic).



Polycom Expands Multi-codec Offering

Recognizing that one size doesn't necessarily fit all, or in Polycom's case, six sizes don't necessarily fit all, Polycom has formally announced the ATX 300, a telepresence kit featuring technology components and software that is combined with planning, design, and implementation services from qualified AV integrator partners to create customized solutions for a broad range of industries and applications. The system can be used to create unique immersive telepresence environments customized with displays, furniture, lighting, acoustics, décor, etc. Customers may also be able to incorporate existing furniture or components to reduce costs and adapt the system to unique room requirements.

Check out www.wainhouse.com

Synchronized with the new look of the WR Bulletin, we've launched a new website with a new, cleaner, well organized design. You'll now find all our research studies and other content arranged by coverage area.

Take a look! www.wainhouse.com


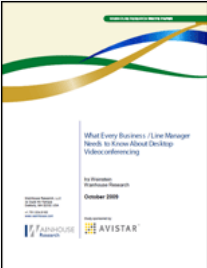




News in Brief

- UK-based AuDeo Systems joined the ranks of videoconferencing channel partners offering a hosted videoconferencing service. Virtual Meetings, the name of the new service, is based on Radvision technology and on a concurrent licensing model payable by monthly subscription. The desktop client software is free to download; customers pay for connection ports, not users. While intended for the desktop user, the solution and service is interoperable with existing room based systems.
- Glowpoint reported Q3 revenues of \$6.54M, an increase of more than 7.8% from the same period a year ago. This included recurring subscription and related revenue for the quarter of \$5.03 million, up 16.2% year-over-year. Third quarter income from operations was \$0.14 million.
- Ancona, Italy-based Aethra is in the midst of an internal reorganization. The Telecommunications branch of Aethra SpA has been officially taken over by new investors and transferred to the new company A TLC s.r.l. No changes to the products or people are reported.
- UK-based distributor Medium Ltd has acquired the majority of the share capital in Beyondis Ltd, with a view to further expanding into the videoconferencing market. Beyondis is a distributor dedicated predominantly to video and will become a trading division of Medium.
- Wainhouse Research is looking for a few good sponsors to participate in our NEW 2010 WR Bulletin sponsorship program. Contact sfargo@wainhouse.com for details. The WRB sponsorship is an opportunity for a limited number of companies to position themselves as forward-looking, collaboration-industry supporters.
- TelcoBridges has introduced two new high capacity TDM-IP media gateways intended for the service provider market.

- Global IP Solutions, a provider of IP multimedia processing solutions, announced it is enabling Android mobile application developers to build first-rate VoIP-enabled clients with GIPS VoiceEngine Mobile, software that allows Android developers to build VoIP-enabled applications that offer HD voice, while tackling all the typical IP network issues - such as delay, jitter, packet loss, bandwidth constraints, noise and echo.
- Citrix is adding integrated toll-free audio services to its GoToMeeting Corporate and GoToWebinar services. Customers that establish meetings via GoToMeeting will be able to choose toll-free, a toll number, or VoIP audio to go with their meetings. Each user will be able to accept an audio option along with web conferencing.
- The Whitlock Group (TWG), Impact Europe, and their Global Presence Alliance program have added AVW-TELAV Audio Visual Solutions to the team, increasing the alliance's footprint in Canada.
- Tandberg has a new software release for the Tandberg Content Server (TCS) that makes it easier for TCS users to record, edit and share multimedia files in all common streaming media formats, but the big news here is support for Adobe's Flash. TCS supports recording and sharing of training sessions, lectures, presentations and meetings. With the addition of Flash support, many organizations can post recorded content straight from a video call to any website with no need for decoding. One key concern we are seeing here, with H1N1 and other evil threats out there, is business continuity and TCS addresses those needs by being able to record calls from any standards based endpoint for archiving and future viewing. The addition of Flash support, of course, adds cross-browser, cross-platform, and cross-device streaming capabilities to TCS. Software upgrades will be available for existing TCS customers in Q4 2009.
- Avaya's proposed acquisition of Nortel Enterprise Solutions has cleared the European Commission.
- Polycom has joined the Cisco Developer Network Program. Yes indeed, this is focused on Cisco's Unified Communications lineup. In a related announcement, Polycom's HDX 4000, 6000, 7000, 8000 and 9000 systems have completed interoperability testing with Cisco's Unified Communications Manager versions 6.0 and 7.0.

New White Papers from WR (free!) Click title to download or visit www.wainhouse.com

			
<p>The New Imperative for Lecture Capture Solutions in Higher Education</p>	<p>What Every Business / Line Manager Needs to Know about Desktop Videoconferencing</p>	<p>What Every IT Manager Needs to Know about Desktop Videoconferencing</p>	<p>Evaluation of the IPeak IPQ Technology</p>

New WR Premium Content

The following titles are now available from WR's subscription service; click title for details.

- [Research Note - Logitech to Acquire LifeSize](#)
- [Research Note - InfoComm International Leads Efforts to Develop Standards for Audiovisual Systems Design & Coordination](#)
- [Matrix - Set-top Videoconferencing Systems](#)
- [Research Note - A Quick Look at the Sony PCS-XG80 Video System](#)

The Wainhouse Research Bulletin would like you to join us in thanking our 2009 sponsors:

Aethra	Haedenbridge
AGT	LifeSize
Cisco	Talk & Vision
Compunetix	Teliris
York Telecom	

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Call for Papers: Virtual Symposium with WR, Drexel University, & World Bank

Revisiting a successful combination online and brick-and-mortar event last held in November 2008, Wainhouse Research will co-sponsor Education for Everyone: Expanding Access Through Technology with the World Bank Institute's Global Development Learning Network and Drexel University. On demand multimedia presentations, blogs, and live online events will be a part of the mix, with webcasts held March 24-25, 2010. A call for papers is being held through November 23, 2009. Visit www.global-symposium.com for more information or contact stacy@wainhouse.com.

People & Places

Accordent Technologies, **Chris Otten**, Regional Sales Manager
 AVI-SPL, **Patrick Britton**, General Manager, Systems Integration
 Audio Video Systems, **Michele Ferreira**, VP Sales & Marketing, **Barry Goldin**, VP Operations
 ClearOne, **Buzz Goddard**, VP Worldwide Residential Sales
 RingCentral, **Ryan Azus**, VP Worldwide Sales
 TriNET Systems, **Kelly Harman**, VP Sales, **Owen Young**, Network Practice Manager

Event Calendar

Conferencing & Collaboration Events	
When & Where	Who & What
March 23-25, 2009, via the Internet	Education for Everyone Virtual Symposium
April 19, 2010, Berlin, Germany	CSP Summit
April 20-21, 2010, Berlin, Germany	Wainhouse Research Collaboration Summit
July 20-21, 2010, Boston, MA	Wainhouse Research Collaboration Summit

CSP Summit in Pictures, 26-Oct-09

www.wainhouse.com/cspsummit



WR's Marc Beattie sizes the opportunity



Bill Gardner's spatial audio demo "wowed" the audience



Only at the CSP Summit – is that BT, Premiere Global & InComm sitting next to one another?



Lively conversation at lunch offered an opportunity to share ideas



WR's Brent Kelly shares his outlook on Unified Communications



The networking reception - a key opportunity to make new connections

One on One with VRM Italia CEO Anna Ramazzotti

We recently had a chance to meet up with some videoconferencing channel partners from Italy and to chat about the transitions ongoing in the Italian videoconferencing (VC) market. According to Anna Ramazzotti, VRM Italia CEO, the panorama in Italy is similar to the rest of Europe in terms of suffering the effects of the global economic crisis. Still VRM's year has been positive.

WRB: Briefly, what can you tell us about your company.



VRM Italia CEO Anna Ramazzotti

AR: We try to be a complete solution provider. We have been in the business since 1988 and have 25 people across two offices – Milan and Rome. VRM is a Platinum Partner and Center of Excellence for Tandberg and also is starting a collaboration with LifeSize; we have past experience with Polycom and Sony. We are Accredited Service Partner and we have a certification for Tandberg's Telepresence services.

The majority of our business is split between B2B and Government. For our clients reliable VC technology can be mission critical and that is the view we maintain at all times.

WRB: Has the economy in Italy suffered like most of the rest of the world in the past 18 months, and if so, how has this affected your business.

AR: Yes, Italy has also suffered from the financial crisis, but perhaps a little less than other countries such as the UK. I think this is because Italian companies have not been so concentrated on the public stock markets. We have seen how more and more companies have opted to invest in VC as a tool to save travel costs and speed negotiations. Our customers see their ROI very quickly. The crisis also gave VRM an opportunity to expand into new markets that would not traditionally have used this kind of technology.

WRB: In what areas have you seen an increase in videoconferencing adoption?

AR: The finance sector in Italy has been using VC more in the past year. Specifically, there have been mergers where using videoconferencing has facilitated transactions and negotiations.

WRB: Can you give an example.

AR: Sure. Look at Unicredit's deal with Banca di Roma or the merger between Italian lender Intesa and Sanpaolo bank which was carried out using Tandberg videoconferencing systems. Other important banks have increased the use of VC as for example Monte dei Paschi di Siena and Banca di Credito Cooperativo.

WRB: VRM offers end-to-end solutions, from system designs, networking and control systems to a comprehensive customer support structure. How has this impacted the company's performance?

AR: The business this year has grown 40 per cent, despite the crisis. This comes not only from room systems sales but also from infrastructure revenue. We have also been working with other companies to integrate their resources to allow for unified communications. Tandberg is our strongest VC brand, but we are seeing that LifeSize is gaining market share thanks to Italian VC manufacturer Aethra's current difficulties in the market.

WRB: So, what is the state of the market right now in Italy now that Aethra is in crisis and Tandberg may be merging with Cisco?

AR: The deal between Tandberg and Cisco is very important for us because of Cisco's ability to drive the market. We have been partners with Tandberg since 2002, so Aethra has been a competitor. Aethra has had a strong position in the Italian market mainly because of its historical relationship with Telecom Italia (TI). But VRM has had a

relationship with TI since 2003 and this is becoming stronger as we manage to offer better and more tailored services for clients.

WRB: Can you explain the role of TI in the videoconferencing market. We thought they would be a competitor to you, not a customer.

AR: Telecom Italia has been involved in the VC market since the 90's. When they started they offered videoconferencing simply as an accessory for their communications offering.

A great help for the expansion of VC has been the use of IP networks. In the past TI sold connections through ISDN only and this made it very expensive for companies to adopt videoconferencing. IP networks allow TI and other carriers to diversify its network proposition and then to focus more on the functionality and benefits of the VC solution.

Now Telecom Italia and other carriers have realized that VC should be considered part of the business model and offered together with services. This is where VRM should play an important role on TI's strategy. TI doesn't buy VC directly from the manufacturer but through channel partners like us. We offer value added services and support. The synergies work very well.

WRB: What vertical markets are especially important to VRM?

AR: The finance and banking sector together with the public sector are our main areas. We also have a relationship with FastWeb, a network service provider that has important tenders on the public sector. Some of our work is in the security and military sectors too. The education market in Italy, however, is not very strong for our business. This is mainly because of the lack of government investment in this area.

WRB: How important is desktop conferencing to your business?

AR: Desktop conferencing is important because we believe it is a market driver in the adoption of VC and we think it also influences the take up of telepresence. The continued use of VC on desktops drives the market for a complete VC solution. The key is to change habits in the way business is conducted. People need to be used to visual communications and collaboration at the desktop. You didn't ask about this, but I should add that on the telepresence front, we have introduced Tandberg's T3 but so far no sales have materialized. We are expecting telepresence to start being adopted soon.

WRB: As a videoconferencing channel partner, what are the major challenges you see for your company in the next 12 months?

AR: We would like to remain competitive - on complete solutions, on prices, new technology, trends - and to expand activities. This is why we invest every year in training and we are constantly looking at implementing new procedures to increase the efficiency and professionalism of our employees. Competition is always a battle. We see that in 2009-2010 more companies are tending to use service providers like TI and FastWeb because they can pay for hardware and services in an installment model. Financing programs are a winning proposition in Italy. This is why our partnership with TI and FastWeb is very important for us.

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