

## Berlin WR CSP Summit and Collaboration Summit Now Rescheduled

*Good news. We have the same event at the same hotel in Berlin and for the same room rates, even though this is now high season. Details follow.*

21 June (afternoon): CSP Summit

22-23 June: Collaboration Summit

### News in Brief

- Another OSLO-exchange-traded company bites the dust / cashes out. Google announced it is buying California-based (but Oslo traded) Global IP Solutions for approximately \$68m in cash (about 5x revenues). Google plans to use GIPS for real-time audio and video communications. The deal means that Google will own the voice and video conferencing engine behind its competitors' instant messaging systems. GIPS' software, which we've covered in numerous bulletins, is reportedly installed in more than 800 million endpoints and the company touts integration with unified communications tools from the likes of Avaya and IBM. The company's software allows for video and voice processing, unified communications, fixed mobile, voice and video conferencing and enterprise IP telephony. Beside Avaya and IBM (Sametime), GIPS' customer list includes Yahoo, AOL, WebEx, and Baidu, all of whom must see Google as a looming threat. One other interesting point to ponder – Google has been using Vidyo's scalable video coding (SVC) technology to power Google's videoconferencing service. But GIPS has also developed SVC technology – in June, 2009 the company announced support for H.264 SVC within its GIPS VideoEngine, software that supports multiple standard and proprietary algorithms. While a \$68M acquisition is small potatoes in today's M&A world, the ripples from this deal may be felt far and wide in both the land of videoconferencing and the universe of Skype.

This is the fourth video and VoIP acquisition by Google in two years. At the end of last year, Google bought VoIP provider Gizmo5 for \$30 million aiming to improve its native Google Voice application. Prior to that, the company added On2 for open-source video code called VP8, and also a company called Grand Central for its Google Voice routing service. Long ago, Google acquired Scandinavia-based Marratech with its video-enabled desktop collaboration solution. So as one astute observer of the industry asked me, is there a mastermind behind the scenes at Google? And if so, is he psychotic?

- Speaking of Skype, the company has launched the beta version of its group video conferencing chat service. This will allow up to 5 simultaneous

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participants, enabling Skype to compete with fee-based services such as Logitech's SightSpeed (supporting up to 9 participants) , ooVoo (up to 6 participants) and Apple's free iChat AV, supporting up to 4 participants.

- Stunning but not surprising news from Polycom this week as Sr VP of Field Operations Andy Miller was named president and CEO of the company. Andy succeeds Bob Hagerty, former CEO and chairman, who is leaving the company and resigning from the board. Lead independent director Dave DeWalt (whose other job is CEO of McAfee) has been named board chairman. Bob Hagerty, who ran the company for 13 years and grew it from \$37M to \$1.1B, (approximately 30% compound growth) will provide consulting services to Polycom to assist with the transition.

⇨ WR Forum: [Polycom Names Andrew Miller President and CEO](#)

- Networking provider Masergy Communications has launched a sixth class of service (CoS) referred to as a "limited plane." This CoS enables enterprises to use the network more efficiently for data back up and to support scalable video coding desktop applications.
- AT&T is expanding its AT&T Telepresence Solution global footprint to customer sites in a total of 75 countries and territories. This expansion includes the 12 new countries where AT&T offers its fully managed AT&T Telepresence Solution and 37 additional countries where AT&T Telepresence Solution includes proactive remote monitoring of customer-owned videoconferencing equipment and access to the AT&T Business Exchange.
- A new "non-standards" body was announced this week, called the [Unified Communications Interoperability Forum](#). This forum has as its vision "to enable interoperability of UC hardware and software across enterprises, service providers, and consumer clouds, as a means of protecting customer's existing investments, simplifying their transition to more extended UC networks, and generating incremental business opportunity for all stakeholders in the ecosystem. "

The UCIF plans to do this, not by developing new standards, but by using existing standards to promote interoperability, at least at a base functional level, across all UC systems. The sense of the organization is that high tides raise all boats, and these companies believe all of them, plus others yet to join will see their efforts and fortunes increased by assuring their UC products become more interoperable. Three levels of members exist in the UCIF:

Founding Members	Contributing Participants	Adopters
HP Polycom Logitech / LifeSize Juniper Microsoft	Broadcom ClearOne Jabra Plantronics Radvision Siemens Teliris	Acme Packet AudioCodes Aspect BroadSoft Brocade

These members of will collaborate to ensure products and solutions from different manufacturers and service providers will work together, enabling more choice in the supply chain and better user experiences. The group hopes that interoperability will help preserve

investments in existing products and that it will assist with creating rational migration strategies.

The UCIF will form several internal groups including a technical group responsible for testing and certification. This group will ultimately create some sort of a testing lab or environment and provide a mark or seal for products that complete the testing program. A second group is the marketing group designed to help grow the organization and its influence.

Organizers state that the UCIF is all about expanding the UC pie, not getting a larger piece of the existing pie. They will establish a baseline with a minimal level of interoperability. Above this base level of interoperability, companies can customize and create proprietary solutions as needed or desired to differentiate themselves.

Since it is not a standards body, the UCIF will coordinate with SIP Forum, IMTC, and other standards bodies. Rather than reinvent anything, the UCIF will combine the collective strength of its members in reinforcing the momentum of these standards groups with success stories, awareness, etc. The organizers liken the UCIF to the very successful Wi-Fi Alliance. A UCIF founding member stated that there is “enough blue ocean” for everyone to succeed and that “there is an embarrassment of opportunity”; however, with so much opportunity, he stated that the UCIF needs to be very selective in what it chooses to address. According to the press release, the UCIF will focus its initial interoperability efforts on “managing the escalating diversity of video and telepresence solutions.”

*Here's What Brent Thinks:* Although the UCIF expresses a wonderful vision, we do see some challenges. Notably, Cisco and Avaya, the two largest telephony vendors are not yet on board. Neither is IBM. We did not see any major carriers as UCIF members, all of whom are joining the ranks as UC solution providers. What we have seen in the market is that vendors will talk about standards and boldly say that their products are standards-based. Then, as one looks closer, it becomes evident that to get the functionality one really wants and needs often requires the non-standard extensions. All of the major PBX vendors have SIP extensions built into their telephony solution to provide the capabilities that generic SIP does not provide.

We are not skeptics of the ideas and goals behind the UCIF – they are sorely needed. We do question whether the vendors, who must necessarily look out for their best interest, can really be motivated to support the goals behind the UCIF to the extent necessary for success. The Wi-Fi Alliance has clearly made it possible for wireless networking interoperability, which is one single connection mechanism. Can the UCIF somehow rationalize all of the connection mechanisms and available protocols required to have full voice, video, web conferencing, and presence/IM interoperability, each with its myriad of variations? We're not convinced. In any event, WR will support the effort as best it can, and we wish the new UCIF good luck.

*Andrew's Comments:* To say that this is an “ambitious undertaking” might be the world's biggest understatement. After 20 years, the room videoconferencing market still struggles with interoperability – if you don't believe me, you haven't tried it. Interoperability is an N-dimensional problem, and in the UC world, it's probably an N<sup>3</sup> dimensional problem. The announcement and subsequent analyst briefing was long on vision and short on details.

We hope UCIF will succeed, and we will do what we can to help, but the odds, in our humble opinion, are not very good.

- York Telecom celebrates its 25<sup>th</sup> anniversary this week. As part of the festive event, the company will be demonstrating real time interoperability between Cisco TelePresence endpoints, Polycom, Tandberg and LifeSize High Definition desktop and group systems. Whoever said people from New Jersey don't know how to interoperate? In an unrelated announcement, York has teamed with Savvis to provide a complete Cisco telepresence service to enterprise customers.
- Vidyo has introduced VidyoHealth, a videoconferencing system with support for HIPAA-compliant encryption and other secure features important to the telemedicine market.
- Paradiad has announced the availability of a Microsoft OCS 2007 compatible RealTunnel MS ICE SDK for working in any firewall, NAT, and web proxy environment

### **Clarification re: LifeSize Video Center**

Our coverage last week of LifeSize's Video Center didn't portray the correct story. We wrote viewers when we should have said "concurrent recordings." Here is the real data, according to the ever-watchful Conferencing Advisors and LifeSize itself.

<b>Performance and Capacity</b>					
Bit Rate	Resolution	Hours of Storage	Concurrent Recordings	Live Viewers	On-Demand Viewers
768 Kbps	720p30	2,600	20	1000	350
400 Kbps	480p30	5,200	40	2000	400
270 Kbps	360p30	7,800	50+	2500	450

<b>Conferencing &amp; Collaboration Events</b>	
<b>When &amp; Where</b>	<b>Who &amp; What</b>
28-29 May, Johannesburg, SA	<a href="#">Kathea Partner Conference</a>
14-18 June, Jesi, Italy	<a href="#">IMTC SuperOp! 2010</a>
June 9-11, Las Vegas, NV	<a href="#">Infocomm 2010 and the IMCCA Pavilion</a>
21 June, Berlin, Germany	<a href="#">Wainhouse Research CSP Summit</a>
22-23 June, Berlin, Germany	<a href="#">Wainhouse Research Collaboration Summit</a>
July 20-21, Boston, MA	<a href="#">Wainhouse Research Collaboration Summit</a>
October 3-6, Ft. Lauderdale, FL	<a href="#">VCI-G annual conference</a>
October 12, Boston, MA	<a href="#">Wainhouse Research CSP Summit - North America</a>

## WR Collaboration Summit Update - Boston



While our postponed Berlin event is happening in June, we've already begun filling in some details for our Boston Collaboration Summit, scheduled for July 20-21 at the Hyatt Hotel on the Charles River in Cambridge, MA. So far we have speakers presenting on 1) cloud computing, what it is and isn't, and why collaboration users should care; 2) the challenges and benefits of deploying a network of telepresence suits; 3) how one company claims an annual ROI of over 1000% on their UC deployment. We are also planning several presentations on the use of videoconferencing, interactive whiteboards, and other collaboration tools in EDU and how these developments will roll over to the enterprise. And we think we secured one of the "biggie" consulting firms to talk about their use of videoconferencing managed services. This event promises to be THE North American collaboration conference of the year. Don't miss it. The registration page is live at [www.wainhouse.com/boston2010](http://www.wainhouse.com/boston2010). If you have an interesting application of conferencing technology and would like to speak at the event, contact [andrewwd@wainhouse.com](mailto:andrewwd@wainhouse.com). If you would like to sponsor and exhibit, contact [sfargo@wainhouse.com](mailto:sfargo@wainhouse.com). Stay tuned.

### Boston Collaboration Summit Sponsors



## New Publications from Wainhouse Research

Subscription	Document Title & Link	Description
VCP	<a href="#">Videoconferencing Industry Statistics – Q4 2009</a>	Statistics on videoconferencing sales revenue, units, and market share.
VCP	<a href="#">The End of the AV Touch Panel?</a>	Describes currently available alternatives to traditional touch screen control panels.
VCP	<a href="#">Company Profile – Colaboracion Virtual</a>	Insight and analysis on the company and its videoconferencing managed service offering.
VCP	<a href="#">Business to Business (B2B) Videoconferencing: Technology Tutorial &amp; Handbook</a>	Describes B2B videoconferencing challenges and some of the current and emerging solutions to address them.
UCP, report for purchase	<a href="#">European CSP Forecast &amp; Provider Reviews 2010</a>	Covers state of European Collaboration Service Provider markets including sizing, forecast, trends, risks and opportunities.
UCP, report for purchase	<a href="#">European CSP Market Opportunities 2010</a>	WR's independent assessment of the addressable market for CSP services
Report for purchase	<a href="#">Rich Media Metrics 2010 Survey: Enterprise Social Networking &amp; Team Workspaces</a>	This analysis is one in a series of WR surveys measuring end user attitudes, preferences, and buying/deployment trends.

## Wainhouse Research in Berlin



21 June – [Details](#) or [Register Now](#)

22-23 June – [Details](#) or [Register Now](#)

Come hear some interesting perspectives and question the experts at the Collaboration Summit at the Steigenberger Hotel in Berlin, June 22-23. We've arranged special room rates at this 5-star hotel if you book now. June is a fabulous time to visit one of the world's great cities.

	<p>Chuck Stucki Cisco <i>A new perspective on visual communications &amp; enterprise collaboration</i></p>		<p>Chris Carr Masergy <i>The Future of Networks for Video</i></p>		<p>Andrew Davis Wainhouse Research <i>Where is videoconferencing heading?</i></p>
	<p>Luis Carlos Garza CEMEX <i>From telepresence to the desktop: Key issues</i></p>		<p>Nico Hofman Philips <i>The office is just a state of mind</i></p>		<p>Moshe Machline RADVISION <i>Point-counterpoint: A new perspective on videoconferencing</i></p>
	<p>Dr. Per Einar Weiseth Statoil ASA <i>Conferencing beyond the conference room</i></p>		<p>Alex Eleftheriadis Vidyo <i>Point-counterpoint: A new perspective on videoconferencing</i></p>		<p>Shai Toren Emblaze-VCON <i>Point-counterpoint: A new perspective on videoconferencing</i></p>
	<p>Marc Beattie Wainhouse Research <i>The Transformation of Communication Service Providers</i></p>		<p>Eugene Tcipnjatov Wyde Voice <i>HD isn't just for video anymore</i></p>		<p>Jerry Pompa Compunetix <i>Unified communications and mobile conferencing services</i></p>
	<p>Thomas Pind CEO Futurecom <i>7 reasons your employees don't adopt conferencing and what you can do about it</i></p>		<p>Rich Jenner Avaya <i>Creating a truly collaborative UC environment through inclusivity</i></p>		<p>Stefan Karapetkov Polycom <i>How UC &amp; TP are changing video protocols and interoperability forever</i></p>
	<p>Michael Stiefel Reliable Software <i>Cloud Computing: What Will Be The Impact</i></p>		<p>Andy Nilssen Wainhouse Research <i>Team Workspaces 2.0: Get ready for the next level</i></p>		<p>Tolga Sakman Tandberg <i>The long-awaited video-centric collaboration boom: Why this time it really is different.</i></p>

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