

News in Brief

- Virtual environment software company vcopious announced the launch of VC2, a “virtual spaces” application server appliance. The vcopious VC2 application can reside both within network enterprise deployments or hosted environments. The vcopious solution offers immersive networking, socializing and tracking tools as well as a proprietary content management system to enable self-service virtual environment building tools in either 3D or 2D. According to the company, having a virtual space for collaboration and other applications as an appliance rather than as a pure service will change the way these technologies are adopted. Applications for VC2 include product launches, customer service portals, hybrid conferences, employee training, e-commerce, and virtual branding events.
- Vidyo announced that its Vidyo platform now supports Apple’s just released iPad 2, Motorola’s XOOM tablet, and the Atrix 4G smart phone utilizing Vidyo’s software development kit that is available to partners to create innovative applications. Vidyo’s platform provides a 720p HD multipoint video conferencing solution on the iPad 2.

Here’s what I think: School’s still out as to whether videoconferencing on cell phones is going to make it to the mainstream. Yes, the screens are small, and the ergonomics might be questionable, but I think almost all the markers are pointing in the same direction. We’re all 1) basically visual beings, 2) accepting of dropped calls and the vagaries of mobile connections while waiting for true 4G, 3) getting used to being connected all the time and re-aligning work-life balance equations, and 4) expecting and delivering instantaneous responses to any and all requests. Hence, mobile video is a sure thing. If there is a fly in the ointment, it is the ominous threat of the carriers to limit data transmissions for all but the most expensive monthly contract plans. But at least we have thriving competition in the mobile carrier market, at least in North America. Oh wait, AT&T is acquiring T-Mobile.

- HP’s new CEO Leo Apotheker, in his first public appearance in this role, hosted a press event to promote HP’s plan to create a personal cloud to bring together work applications, smart phones, social networks, and non-stop connectedness. He also announced an “app store” targeting both consumers and businesses. The good news – we can be always connected. The bad news – we can’t be disconnected.

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- Avaya announced new Aura branch and midsize enterprise solutions to extend collaboration via voice, video and data to enterprise locations of all sizes.
- Glowpoint reported revenues for Q4 and YR2010 of \$7.0M and \$27.6M, up 11% and 9% respectively. The hidden gem: cloud-based managed services grew 46% in the quarter and reached 41% of total revenues.
- Teliris hosted a briefing to announce that it has a new customer.
- We ran across Canada-based ImmerVision recently, as the company announced it had signed deals with Panasonic Canada and Toshiba Teli. ImmerVision has developed and patented 360° panomorph lenses and companion software dubbed ImmerVision Enables. The company licenses its panomorph optical and software technology to global lens producers, product manufacturers and software developers. Panomorph lenses can be adapted to any camera or sensor. While the company's current focus seems to be on surveillance and automotive applications, I suspect there may be some future payoff here with future room based videoconferencing systems that, with a single codec and single camera and Immervision optics and software, may be able to deliver a next-gen viewing experience without all the complexity of today's multi-screen "telepresence" studios. For example, Toshiba Teli's video analytics software can automatically track up to four persons utilizing the 360 degree view captured by a camera equipped with a panomorph lens.
- Sennheiser announced that its DW Office wireless DECT headset has successfully completed interoperability and certification testing by leading manufacturers including Cisco, Polycom, and Avaya.
- Oslo-based CeeLab announced a dual screen, all-in-one executive video conferencing product dubbed the Arrow1000. The system, with a wider angle camera, is based on technology from Sony videoconferencing Japan and can support built-in 3-way conferencing.
- More consolidation happening in the channels: Stampede has acquired Spire Global, the exclusive distributor of Sony video conferencing products in the United States. Spire is also the exclusive master distributor for Compunetix video MCUs and MediaPointe video streaming technology. Spire also distributes Mirial desktop video conferencing products. Spire will continue to exist as a dedicated business unit.
- Speaking of channel partners, the AV Global Alliance has expanded to 28 partners with the addition of partners in Germany, Italy, Spain and Brazil; Vidofon, Durante, Techno Trends and Eletro Equip respectively.
- PGI launched a new service, iMeet – an engaging meeting experience combining conference calling, video conferencing, and social networking - all in your very own virtual room. iMeet encourages everyone not just to meet, but to get to know each other professionally and personally. Here are some examples of how web conferencing has played an important part in history. Check these YouTube videos out: [One Two Three](#).
- Mirial announced that ClearSea can be used on the iPad 2, taking full advantage of the new front facing camera with the possibility of switching between cameras even during the



video call. ClearSea is a software client that enables PC, Mac, Android or iOS device to video call and to connect to any standards-based H.323/SIP equipment.

- Interesting application of the week.... undergraduates and doctoral students from Arizona State University's School of Life Sciences are currently engaged in face-to-face interactions with staff scientists from the Smithsonian Institution in Panama. Experts from the Smithsonian Tropical Research Institute (STRI) and scientists at the Smithsonian in Washington, D.C. are sharing real time classroom activities with ASU professors and students using Internet-based videoconferencing from the jungles of Panama courtesy of Vido. If you have an interesting application of videoconferencing, web collaboration, unified communications, streaming, or heaven forbid audio conferencing, shoot an email and photo to andrewwd@wainhouse.com.



News from Wainhouse Research

CSP Summit Coming to Brussels



'Driving Growth of Collaboration Services in an Emerging Unified Communications Environment'

When: Monday-Tuesday, May 23 & 24 2011

Where: Crowne Plaza Le Palace, Brussels

Our seventh European CSP Summit will be held for the first time in Brussels at the Crowne Plaza Le Palace located in the heart of Brussels and only a short walk from La Grand Place. Our event this year will run from lunchtime on Monday, May 23rd and adjourn at lunchtime on Tuesday, May 24th. This new format will allow even greater opportunity for networking and yet still accommodate our very full and informative agenda. The conference this year will include several presentations from WR analysts to help provide insight into collaboration services and the coming opportunities for all service providers and their technology partners. Details and registration: www.wainhouse.com/cspbrussels2011. For general queries contact Richard Norris, richard@wainhouse.com, for sponsorship opportunities contact Sara Fargo, sfargo@wainhouse.com.

North America Summit Moving to Philadelphia



When: Tuesday- Wednesday, July 19 & 20 2011

Where: Doubletree Hotel, Philadelphia, PA

Our eleventh North American Summit will focus on emerging technologies and solutions in both the product and services space and the business and technology trends that are shaping the industry. This year's conference will feature multiple presentations from both

end user customers as well as WR analysts and of course our famed interactive panel discussions. Unfolding details will be appearing at www.wainhouse.com/philly2011. For general queries contact Richard Norris, richard@wainhouse.com, for sponsorship opportunities contact Mark Gotta, mgotta@wainhouse.com.

WR Summit 2011 – Philadelphia - Gold Sponsors



New WR Subscription Service Content

Subscription	Document Title & Link	Description
VCP	Company Profiles: - Brainshark - First Connections - CeeLab - Apparent Networks	Detailed information, insight, and analysis on each company and its videoconferencing-related product offerings.
VCP	Videoconferencing SpotCheck - Q4 and FY 2010	Quarterly report providing market data for videoconferencing endpoints and infrastructure.
VCP	Underneath the (Numbers) Hood	Statistics on videoconferencing endpoint sales revenue and market trends.
VCP	Motorola Atrix 4G: The End of Device Proliferation?	This research note discusses the Motorola Atrix 4G and its potential impact on the future of business communications.
VCP	Comparison Matrix - Hardware Videoconferencing Endpoints - Matrix #1 - Personal Solutions	Comparison matrix for enterprise personal VC endpoints (pads / tablets, videophones, executive systems) from leading vendors.
VCP	Desktop Videoconferencing in a VDI Environment - Part 2 – Two Viable Solutions for 2011	WR's second of two notes provides insight into Avistar's and Cisco's solutions for videoconferencing in VDI environments.
UCP	Emerging CSP Markets, Analysis, & Forecast: Middle East & South Africa 2011	Offers a detailed summary of the current availability & usage of conferencing services, market size by service type, volume and revenue, and a profile of local providers.
UCP	Company Profiles: - Start Technology Services - Elisa - Deutsche Telekom - T Systems - POSTcti - Siemens -Tele Sonora	Detailed information, insight, and analysis on each company and its UC-related product offerings.
WCP	Video conferencing in Web conferencing Unleashed	This research note identifies and discusses six factors that will make 2011 the year video conferencing in web conferencing takes off
WCP	Company Profiles: - Adobe - Avaya - Cisco WebEx - Citrix Online - IBM Lotus - Microsoft	Detailed information, insight, and analysis on each vendor and its audio / web conferencing and team workspaces-related product offerings.

Comparison Matrices

One of the more strenuous exercises Wainhouse Research does each year is produce a series of comparison matrices across a wide range of collaboration products and services. Within the videoconferencing endpoint space, we have released the first two of our planned five comparison matrices – the remainders will be out within 4 weeks. These five matrices, available as part of the [VCP subscription service](#), include over 100 solutions from over 40 vendors.

- [VC Endpoints – Software Solutions](#)
- [VC Endpoints – Hardware Solutions](#) (personal systems)
- [VC Endpoints – Hardware Solutions - Codec-only solutions](#)
- [VC Endpoints – Hardware Solutions - Split Systems and Set-Top Solutions](#)
- [VC Endpoints – Hardware Solutions - Integrated Systems w/Cart & Display](#)

In the next few weeks, WR will be updating our [Comparison Matrix for Videoconferencing Managed Service Providers \(VC MSPs\)](#). This matrix is one of WR's most popular and frequently requested documents; our last release covers offerings from 50+ VC MSPs.

To be included in this project, your video managed service offering must include the following elements:

- 1) A videoconferencing-knowledgeable help desk, AND
- 2) Real-time, centralized videoconferencing device monitoring and management

If your company's VC managed service offering meets both of these criteria and you would like to be included in this definitive collection of VC MSPs, please send a quick email to Ira Weinstein at iweinstein@wainhouse.com.

Conferencing & Collaboration Events

When & Where	Who & What
16-20 May, Kona Hawaii	IMTC SuperOP! : SIP, H.323, VoLTE, IMS, and TIP
23-24 May, Brussels	WR CSP Summit Europe
13-15 June, Orlando, FL	EduComm
15-17 June, Orlando, FL	InfoComm
19-20 July, Philadelphia	WR Collaboration Summit

People & Places

Huawei, **Mourad Bedrani**, Unified Communications Portfolion manager, France
York Telecom, **Jim Anderson**, VP Business Development
Acme Packet, **Ken Osowski**, Director, Service Provider Product Marketing
Insperity, **Steve Huey**, President

One on One with Vidofon CEO Jorg Weisflog

In our quest to speak with as many channel partners as possible, we've even resorted to drinking our own champagne – using videoconferencing to establish that oh-so-personal connection (see photo below) and to see into other people's personal space. This week we re-connected with Germany's Vidofon and CEO Jorg Weisflog, visible in the PiP bottom right of his "personal telepresence" system.



Shoot andrewwd@wainhouse.com an email if you've got a story to tell and if you'd like to chat One on One.

WRB: Last time we talked about ViDOFON, you had just done your first acquisition. How did that work out, and where is ViDOFON today?

JW: It worked out great. In January 2010 the videoconferencing channel partner ViDOFON acquired a systems integrator and AV specialist Dekom. We doubled our size up to 60 people and greatly increased our capabilities and our ability to do larger projects. Dekom is now a brand name. We also recently joined the AV Global Alliance which gives us solid partnerships outside of our main territories of Germany and Spain; and of course it gives the other members of the Alliance a solid partner to work with here. Although we are only a small company, we now can compete quite well against the big guys like Orange, T-Systems, Compua Center, and DiData since we have expertise depth and footprint breadth.

WRB: So, are you a full service videoconferencing provider?

JW: Absolutely. We provide consultancy services to prepare, support, analyze, and assess video over IP projects. Of course we provide training along with sales and installation services. In the video space, we are strong partners for Tandberg/Cisco and for LifeSize where we buy direct; we also are a tier two reseller for Polycom, which is a much smaller part of our business. And we are looking at taking on another line for video as well.

WRB: What about services?

JW: Good question. Services are very important to ViDOFON. We offer a managed service based on three principles – manpower, know-how, and responsibility. We can provide bridging, gateway, and firewall traversal services; we manage customers' endpoints, and we even offer desktop conferencing as a hosted service.

WRB: We've always considered a help desk a fundamental component of video managed services. What do you do there?

JW: First, let me say that we offer a help desk. Then let me add that we think most customers are fooled by help desk promises, particularly those offered by the big service providers. We offer help desk services during normal business hours, and our help desk is staffed by videoconferencing experts. We do not offer 24x7 help desk. When our customers ask for 24x7 support, we think we did something wrong. The solution offered is either too complicated or too fragile. And this is what the customers know as well. Many customers are told by the big guys that their help desk is 24x7, but it turns out that during the off hours, the help desk is staffed by low level support people who can only write down the issue and have someone address the problem the next day. We have a different

approach: we actually provide the name of the responsible technician to the customer. This establishes the trust and ultimately leads to the reaction time the customer demands.

WRB: How is the German market different? Or maybe it isn't.

JW: I think Europe is different from North America; and within EMEA each country is a bit different. Germans in general are more skeptical about new technologies and less adaptive to change than the Americans. I would say the UK is somewhere in between.

WRB: OK, so what's your take on unified communications and desktop or personal videoconferencing?

JW: This of course is the big question we are wrestling with. First of all, when it comes to implementing desktop video on any reasonable scale, IT managers are very conservative, even afraid. What will it do to bandwidth utilization? Can they support it? Will users really want it after the novelty wears off? While there is a lot of exploration and investigation today in Germany, there really isn't a lot of action. In truth, the desktop products available from the videoconferencing vendors, and



you know I represent Tandberg, Lifesize, and Polycom, aren't really suited for large scale deployments. Licensing and concurrent call support are still barriers – business barriers more than technology barriers. So that brings us to unified communications and Cisco/Microsoft. This is a big question for ViDOFON. We already have a lot of the expertise, but we need to become certified in this area. That's our challenge for 2011.

WRB: What do you think is the biggest threat facing ViDOFON?

JW: There are multiple challenges we're facing right now. First, ViDOFON is a fast growing company, so it is a challenge to find appropriate experts and skilled workers for the growing demands. Second, requirements are increasing: projects are getting bigger while expectations of the customers are more demanding. Third, competitive differentiators: A performance winner has to measure up against "eBay prices" as well – a near impossible situation, but common in today's Germany. But there's another challenge on the customer side: The recent consolidations on the VC-market did not diminish uncertainties, but enforced it. This means that an extra dose of trust is needed for a channel partner to invest in a good solution. And, we have to invest more in customer confidence than a few years before, when technology did this by itself. But we don't feel threatened!

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