Mobile-mobile-mobile. Whether you’re thinking iPad or Android or even smartphone, seems like the entire collaboration industry embraced mobile devices in 2011. Videoconferencing on tablets is certainly the latest fad, and likely to stick around for a long time. Besides making anywhere-anytime-anyplace a fact of life, mobility is also driving the BYOD, bring your own device to work, movement, fundamentally changing the nature of IT support organizations.

Cloud. This is the biggest media hype since telepresence and segway. Over 200% of the conferencing and collaboration vendors we have interviewed are moving to the cloud. Google and Microsoft are not far behind.

In the “new company” category we have two outstanding potential disrupters. Blue Jeans Network launched its video bridge in the sky service, featuring groundbreaking connectivity between H.323, SIP, Skype, Google, and Lync. Behind the scenes, the architecture is suitable for real cloud-based services.

Starleaf introduced a single solution for enterprise voice and video with a very different and very intuitive user interface. Starleaf’s product announcement included room and personal systems as well as phones and PBX capabilities, giving the startup a virtually unlimited number of competitors.

Microsoft’s $8.5B acquisition of Skype. Need we say more?

Polycom’s acquisition of the Halo business unit from HP. The deal simultaneously removes HP as a telepresence competitor, makes Polycom the exclusive provider of videoconferencing systems to HP, and removes HP as a reseller of upstart SVC expert and potential Polycom thorn-in-the-side Vidyo.

Citrix HDFaces raised the bar for using a web conferencing solution for video.

Blackboard delivered on its acquisition of Elluminate and Wimba with Collaborate 11, successfully merging two distinct corporate cultures and delivering within one year a new and improved synthesis of two strong education-focused web conferencing vendors.

Cisco reorganizes. Realizes that telepresence is just videoconferencing done right, that not all video fits into the corporate vision. Cancels Flip video, buries Cisco umi, focuses on making the Tandberg acquisition deliver on its promise.

The Higgs Boson, the mysterious manifestation of the field that causes matter to have mass, is discovered inside Polycom’s RealPresence engine.
News in Brief

- **Skype** is offering free WiFi access in 50 airports over the holidays. So, if travelers get stuck due to weather, miss flight connections, or find themselves grounded for any of 49 other possible reasons, they can enjoy face to face video calling to commiserate. We’re not sure whether this will work if you are stuck on the tarmac. And pay attention to your data plan.

- **Oculus** has introduced a new form of mobile telepresence for those who want to walk around the office from a remote location. Reportedly there is a motorized tilting periscope to assist with eye contact.

- As we alluded to last week, **America’s Got Talent**, **Applied Global Technologies** (AGT), announced an advanced communications protocol for mobile video. Mobile Pathway sets the standard for integrating mobile videoconferencing with unified communications and telepresence environments. With a simple download of an app or launch of a web browser, smartphones, tablets, and laptops can be enabled with Mobile Pathway and then easily and securely connect with high definition video conferencing systems without requiring any special firewall traversal devices or IT support.

- **LifeSize** launched LifeSize connections. We took our first set of meetings on this service, kind of like Skype on steroids, using a mix of laptops and room systems in a 6-way call.

- **Vidyo** announced VidyoMobile for the android market (v2.2 through v3.1).

- An interesting and heartwarming story appeared in the Boston Globe last week (unrelated to our Oculus story elsewhere) explaining how Children’s Hospital is sending telepresence robots home with patients after surgery. This allows patients to be observed without asking them to come back in the hospital. The communications here use a VGO robot and take place over Verizon’s LTE network, not WiFi.

- **It’s not all green.** As a result of JISC-sponsored research **Aberystwyth University** has just published a report on power consumed by videoconferencing equipment. You can check it out [here](#) if you want to know “How green was my videoconference?” And a free WRB subscription to the first person to translate rhwydwaith fideo cymru.

- **Come see us in Amsterdam.** Several WR analysts will be presenting at our Amsterdam conference at the end of January. See the details below. We’d welcome the opportunity to meet with some of you one-on-one to learn more about what’s happening in your market, your company, or what challenges you are facing today.

**Organization Changes at Cisco**

**Cisco** announced a new leadership structure. In the old days this was called a re-org. Engineering is now in five groups.

- The Enterprise Networking Group headed by Rob Soderbery.
- Data Center led by David Yen.
- Security and Government Group led by Chris Young.
- Service Provider Networking led by Surya Panditi.
- **Video and Collaboration**, which is comprised of the Collaboration and Communications, TelePresence Technology, Service Provider Video Technology and Emerging Technologies, will be led by Marthin DeBeer. Cisco is combining TelePresence Technology Group and Collaboration & Communications Group into a single Collaboration Group led by Barry O’Sullivan. OJ Winge of Tandberg fame will report to Barry and continue to lead the TelePresence business.
New Whitepaper Available from WR

Our newest publication, sponsored by ACT and vying for WR's longest title in 2012, is “Integrating Microsoft OCS/Lync Video with Group and Telepresence Video Systems: It's Anything but Turnkey. How an Experienced vMSP can Help You Stay Out of Trouble by Avoiding the Pitfalls.” Organizations that try to integrate video from OCS or Lync with group or telepresence systems often run into unexpected “gotchas”. This white paper lists a number of them encountered while integrating over 100,000 OCS/Lync seats with group and telepresence systems. It discusses ways a video managed service provider (vMSP) can make this task easier.

Annual Survey of Videoconferencing End Users

We are about to publish the results of our annual survey of videoconferencing end users. Here is a preliminary result, based on the first 264 end user responses, of an interesting question we asked for the first time..... If your company were to roll out personal videoconferencing systems (for PC, tablets, smartphones, iPads, etc), do you think this would cause your interest in room videoconferencing systems to Grow, Decline, have No Change, or Don't Know. Lots of people said “don’t know,” but the response from the others was a bit surprising. Full details will be published this month as part of our Visual Communications Practice. Further information at sales@wainhouse.com.

Introducing one of the WR Bulletin Sponsors

In business for over 25 years, VTEL is a leading manufacturer of “All-In-One” videoconferencing systems for business and education. VTEL’s IPanel seamlessly blends advanced videoconferencing (H.323 and Skype), PC applications, Internet applications and HDTV viewing…all at a low price.

The VTEL IPanel is like a “Swiss Army Knife” – all the useful capabilities (H.323 and Skype video, PowerPoint presentations, Internet, DVD, and HDTV viewing) are integrated into one large HD screen. The VTEL IPanel is useful in every meeting and training session… in and out of a videoconference.

www.vtel.com
Wainhouse Research Collaboration Summit Coming to Amsterdam

NH Barbizon Palace Hotel | 30-31 January 2012 | Register >

This year, once again, we will be holding our annual European Collaboration Summit in Amsterdam the same week as the ISE exhibition. If you want to learn about the latest developments in visual communications, unified communications, and next generation collaboration solutions and network with WR analysts, industry experts, and colleagues from around Europe, this is the event you won’t want to miss. If you are coming to the ISE show, come a day early and attend the only conference focused on enterprise rich media communications. If you are not planning on attending ISE, come anyway to learn about the future of the connected workplace.

We still have openings for a few silver sponsorships. For further details contact richard@wainhouse.com.

Here are just a few of the presentations we’ve lined up for Amsterdam.

- Telepresence is dead. Long live telepresence.
  Andrew Davis
  Wainhouse Research

- Are Visual Communications helping or hurting your organization?
  Paul Oudenhooven
  ECCO Leather

- The Connected Workplace of the Future, Today
  Ismayeel Syed
  Disruptive Vision

- Why mission critical collaboration services need to be in safe hands
  Ian Heard
  Dimension Data

- Is it Now or Never for Conferencing Managed Services?
  Richard Norris
  Wainhouse Research

- Building for the future: What will the next generation of multimedia conference room look like and will we need it?
  Mark Mayfield
  MR Consulting

- Is UCaaS the future of collaboration?
  Marc Beattie
  Wainhouse Research

- Do mobile devices in the Enterprise spell disaster or opportunity for collaboration?
  Alan Greenberg
  Wainhouse Research
Visual Communications Practice

**Research Note - The Last of the Great Independents?** Commentary on rumors of Avaya acquiring Radvision

On December 13th 2012, the Israeli newspaper Globes reported that Radvision is in “advanced talks” to be acquired by Avaya. Although Wainhouse Research does not typically comment on acquisition rumors, we couldn’t resist this time. This research note provides Wainhouse Research’s thoughts, insight, and opinions into this potential acquisition.

**Comparison Matrix - Video Bridges / MCUs**

Our 37-page matrix details 29 MCU offerings from 13 vendors.

Unified Communications Practice

**Company Profile: West Corporation**

West Corporation is a leading global provider of voice and data solutions. The company employs approximately 42,000 people in North America, Europe, and Asia and posted 2010 revenues of $2.4 billion. In the same year, West’s InterCall conferencing subsidiary managed approximately 24 billion telephony minutes and over 115 million conference calls.

Web Collaboration Practice

**Comparison Matrix – Web Conferencing Offerings 2011**

Annual update containing in-depth details on 25 offerings from 22 vendors. Vendors covered: Adobe (2 offerings), AnyMeeting, Avaya, BigBlueButton, Blackboard, Cisco, Citrix, Implix, FastViewer, FUZE, Glance, IBM Software (2 offerings), iLinc, InterCall, LogMeIn, Microsoft (2 offerings), PGi, ReadyTalk, RHUB, Sonexis, Yugma, and YuuGuu.

**Research Note – WebEx Wakens**

Adds HD video, new capabilities for mobility and the meeting lifecycle, and a freemium entry. On November 16th, at its annual partner and analyst event in Miami Beach FL, Cisco announced that WebEx will play a significant role in its collaboration strategy and presented a number of new capabilities. This research note summarizes what was announced and the implications from WR’s perspective.

EDU Subscription

**Distance Education and e-Learning Metrics Survey 2011**

Survey of more than 210 higher ed, primary / secondary educators, and service / content providers, covering major technologies like lecture capture / streaming; PC-based, video-centric collaboration; PC-based, content-centric web conferencing; group / classroom videoconferencing, interactive whiteboards, and virtual worlds. This year adds spending plans and desires for integration between these technologies and Learning Management Systems.

**Research Note: Research into the Emerging Front Lines for Video in Education: Gaming and 3D Immersive Worlds**

Up to now the idea of video games as an educational tool has been confronted by two opposing viewpoints: 1) high expectations from a few researchers who are enthusiastic; 2) traditionalists and even many otherwise adventurous technologists have expressed doubts about the value. The area of video gaming has been widely marginalized and misunderstood. This note provides an overview of the research into video games (which bear some resemblance to 3D immersive worlds), identifies where gaming and 3D immersive worlds are beginning to intersect with unified communications, and identifies factors that may lead over time to greater adoption and use with other collaborative technologies.

**Desire2Learn Company Profile**

Desire2Learn purchased Captual and its ePresence web casting product in spring of 2011 in the hopes of adding a real-time lecture capture capability to its product line. It released Capture 7.1 in September 2011. This profile examines D2L’s Learning Suite and Capture Station, and how the latter may or may not add to its competitive positioning.