At this year’s annual Cisco Collaboration Summit, the company unveiled — with full regal fanfare, including an in-person pep talk from John Chambers himself — five significant initiatives:

1. The IX5000, a new telepresence system
2. New video infrastructure
3. Project Squared
4. Cisco Collaboration Cloud
5. Box relationship

We take these in order, sharing our thoughts at various points of this report. Ira covers the IX5000, Andrew the new video infrastructure, and Andy and Bill conclude by discussing the latter three initiatives collectively.

**IX5000 Telepresence System**

The IX5000 is an immersive telepresence system that supports between 6 and 18 participants. Key features include three 4K resolution cameras, three 70” 1080p displays, three beam-forming microphone arrays, 18 custom speakers, a new version of Cisco’s integrated light bar, the use of H.265 compression (when calling SX80, MX700, MX800, or other IX systems), and the ability to send two content streams simultaneously. According to Rowan Trollope, the SVP & GM of the Cisco’s Collaboration Technology Group, the IX5000 is a reflection of a fresh new mindset of “Less is More,” a concept that Trollope described as doing fewer things, but doing them better.

**What Ira thinks:** There are a few advances the IX5000 brings to market, including faster, less expensive installation without need for costly room preparation and a more-friendly, content-sharing paradigm, as well as some secondary effects we discuss in a research note.

**New Video Infrastructure**

Cisco wrapped multiple goals and innovations inside several presentations that deal with “infrastructure,” specifically video infrastructure, those pesky devices and software that hide in the closet or float in the clouds. The topic of infrastructure was included in for WR OnDemand subscribers. But are these sufficient to re-ignite demand for immersive telepresence? We think not, or not significantly. Instead, the IX5000 is an excellent motivator for customers of the 2000 – 3000 installed Cisco immersive systems to upgrade. As such, it’s something of a wolf in sheep’s clothing.

John Chambers: “Think exponentially, not incrementally” — this is a game changer.
multiple presentations by Cisco executives covering both philosophy and benefits as well as the technology and products that substantiate or will soon substantiate the message. While we’ve seen Snorre Kjesbu’s team refresh the entire video endpoint line from top to bottom in the past 15 months, we’ve now learned that Thomas Wyatt’s infrastructure team has not been asleep at the wheel either. The innovations fall into four categories:

1. A single video architecture for all types of meetings. *Telepresence Conductor* sits in the middle and together with UC manager and other pieces supports ad hoc, scheduled, and meet me meetings scattered over one resource pool. This greatly simplifies operations for large enterprises and service providers serving multiple customers.

2. Increased server capacity (coming soon). New hardware (maybe) and software enable a 125% increase in virtualized MCU scale while a single conductor instance can cross up to 30 MCUs (physical and virtual) and handle up to 2342 calls.

3. Numerous improvements to the user experience. Lots of little changes here that affect the in-room experience. For example, sharper film strip layout, speaker indicator, recording indicator, etc. On Cisco’s MX700 and SC80, users get a more “telepresence-like” experience with dual-screen devices. Cisco’s version of SVC (multi-streams) is now supported as well. Other improvements are aimed at those who have to install these systems. Cisco brags that two Cisco executives chosen at random were able to unpack an endpoint and make a video call in less than four minutes. Channel partners beware!

4. New licensing options that theoretically make Cisco’s infrastructure easier to order and less expensive as well. Cost reductions of up to 40% were mentioned in passing but details were few.

**What Andrew thinks:** It has been over 4 ½ years since Cisco acquired Tandberg, and we are finally seeing video infrastructure and endpoints that combine the technical innovation, industrial design, and UI experience that is the best of both worlds. What I like best about all the news and demonstrations is something we really haven’t seen before in the video conferencing industry: a strong focus on the user experience — what is it like to launch a call, join a meeting, add a participant, add content, bring in a mobile user, etc. Cisco’s focus here is sure to earn dividends.

**Project Squared**

An entirely new cloud-based collaboration offering, Project Squared is based on the observation that work is increasingly being done by remote teams, working on “agile” projects, facing short deadlines, and using a process that involves many tools. Thus email with file attachments, never-on-time structured meetings, and organization-centric content tools are no longer effective. Designed from scratch on the new Cisco Collaboration Cloud platform (more later), Project Squared is intended to be a virtual “war room” where teams can exchange text messages, upload / view / revise content, and escalate interactions to multi-party audio / video conferences.

Anyone can start a new Project Squared room and access it “at any time, on any device.” Room members are added by invitation from an existing member and can be from any organization. Project Squared is designed with mobile-first usage in mind — clients for iOS and Android are ready for downloading, and web access is available for PC / Mac users using a WebRTC-capable browser (an installable PC client is in the works). Team members, who may be involved in several projects in different rooms, can monitor each room’s activity in real-time using mobile notifications, or review each room’s timeline at their leisure to catch up on recent interactions.

Squared currently integrates with calendars (via Microsoft Exchange), Microsoft Active Directory (AD), Cisco WebEx,
and Box. These integrations help make the offering “consumer friendly with IT manageability.” Box adds cloud-based file viewers and content storage, while AD adds single-sign on and IT manageability. All interactions and content are encrypted as a standard capability of the Cisco Collaboration Cloud.

The service is currently available for free and you can sign up on the Project Squared website. Cisco intends to keep Squared available as a Freemium offering; free-vs-pay feature details have not been determined.

Cisco Collaboration Cloud

In development for about two years — with its inception loosely coinciding with the arrival of Rowan Trollope and Jonathan Rosenberg at Cisco — the Cisco Collaboration Cloud is the company’s new, built-from-scratch platform for delivering cloud-based, real- and non-real time collaboration services. In building the platform, Cisco leveraged “the learnings and technologies” from its existing web conferencing, video telepresence, unified communications, and voice offerings. This being said, the offering is developed by a San Francisco-based team that is hidden away from the rest of Cisco so that it can freely innovate — and thus actually deliver on new-age concepts such as agile development.

The cloud-based platform is designed around four major tenets:

- **Iteration** — Enable agile development via fast, continuous delivery. The goal is to roll out incremental versions, measure what users prefer, and continuously refine at a pace that will keep up with consumer services – and help “bring the cool stuff back to work.”

- **Fusion** — Tie together new and existing offerings on a customer’s premises, hosted by partners, or on the Collaboration Cloud itself. Examples include Cisco Collaboration Meeting Room (CMR), Squared, Jabber; Microsoft Active Directory; standards interop with SIP and XMPP; and third-party offerings such as Box.

- **Security** — Going beyond SSL traffic encryption, Cisco has implemented “end-to-end content encryption,” in which all content is encrypted in the client itself prior to transmission. This ensures the content is secure if it is stored in the cloud. Cisco has submitted its content encryption method to the IETF for standardization.

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Ecosystem — The cloud is designed to serve the full ecosystem of partners, developers, and administrators as equal “first-class citizens.”

While the first service delivered on the Collaboration Cloud is Project Squared, Cisco plans on opening up the API’s to enable third-party service offerings over time.

Box

“What if Lync and SharePoint just worked?” Dropping this line on stage, Box’s co-founder and CEO Aaron Levie unabashedly summarized the intention between Box and Cisco: Take two best solutions and make them work. The result is the integration of Box’s cloud-based file viewer and content storage with Project Squared.

So how do these offerings play with Cisco’s existing products and services? Cisco believes users want the freedom to choose from multiple tools and will pick the right tool for the task at hand. To assist in sorting all this out, Wainhouse Research offers the following update to your Cisco decoder ring:

- **Jabber** is for initiating quick, real-time communication. It’s “where you live.” Everyone needs to be logged in; people external to your organization need to be federated. Supports presence, text, audio / video calls, simple screen sharing.

- **WebEx CMR** is your virtual office; you host people in meetings by giving them your personal URL.

WebEx has complete video and web conferencing capabilities, and it works across organizations.

- **Project Squared** is a persistent virtual team “war room.” Team members don’t have to be logged in, there is no host, and it works across organizations. Supports text chat, content uploading / viewing / downloading, audio / video calls, real-time notifications, and maintains a timeline. Note: no presence or desktop sharing.

**What Andy thinks:** In many ways, the key announcements at this event amount to a Rowan / Jonathan coming out party. Give them credit for shaking up Cisco’s status quo and doing what was needed to get something completely new and different out the door. Is Project Squared instantly compelling and uniquely competitive? Some will argue that it’s just “on par” with what can be found elsewhere, but I think that’s the point: Cisco is back in the running in a space where it tried before and didn’t make a dent. And Cisco went to great lengths to convince us that Project Squared is built by a new team on a new platform that will not only enable quick iterations to existing services, but also be the foundation for new cloud offerings from Cisco for years to come. To quote Jonathan, “You haven’t seen anything yet.”

**What Bill thinks:** Cisco presented a number of New Shiny Things at this year’s collaboration summit, including new telepresence hardware and simplified UC hardware, but make no mistake: Project Squared hogged most of the limelight. Now when we collaboration nerds are presented with any New Shiny Thing, we have an immediate need to pick apart the solution, judging its core functionality, evaluating its “click-ability,” and analyzing its overall utility. At first blush, Project Squared doesn’t look, feel, or
smell like anything that new — the concept of a virtual room with chat, persistence and support for small audio and video conferences isn’t unique. This is a book that can’t be judged on first impressions alone, however. Project Squared is a vastly unique solution for Cisco on multiple levels. First, the team developing project squared is completely ‘ring-fenced’ inside the mother ship, segregated from the rest of the organization. This team’s mission is to deliver solutions that “strike a balance between consumer sensibility and IT practicality” — a very different approach than we’ve seen Cisco take in the past. Second, the heavy lifting this team did over the last 18 months or so focused on process, toolset, and infrastructure — creating an environment and a platform that will support agile product development moving forward. In total, Project Squared breaks from the traditional hardware-oriented development cycle in every possible way. This will surely position Cisco and its partners to create new, competitive collaboration solutions at a rapid — and required — pace.

This should help solve a core challenge Cisco is facing in the new consumerized and software-oriented collaboration market. At the same time, this likely will introduce unique challenges for Cisco and its partners. Through the course of the Summit, it was apparent that there are more questions than (non-NDA) answers regarding Project Squared: how will you make money from this? What training will your channel need? Will a premises-based version be made available? Will this cannibalize WebEx or co-exist? And so on. Of course, this is by design — Project Squared follows an agile creation > delivery > feedback > update cycle intended to rapidly improve the user — and partner — experience. While this ‘hard right’ will undoubtedly wreak a little havoc inside the mother ship, I think this is good — if not needed — havoc, and a critical step in Cisco’s march into the next phase of collaboration solutions.

Panopto 4.7 Arrives
Alan D. Greenberg, agreenberg@wainhouse.com

Panopto, a video platform provider for enterprise and education markets, announced a few days ago the latest release of its video capture and management system. The update introduces a refresh via an entirely new, end-to-end HTTP Live Streaming (HLS) media pipeline for broadcasting, recording, and streaming HTML5 video to any device, as well as new snap-ins for embedding video recording and searchable playlists into existing websites. The company also announced a new Panopto-certified video capture appliance in a new form factor, through a partnership with Seneca Data (recently acquired by Arrow Electronics) and with Datapath.

Panopto’s video platform now records using H.264 video and AAC audio and streams using HLS, an increasingly popular protocol for live Internet streaming. The goal is to help companies use the Panopto platform for larger-scale events, say marketing and external webcasts (though there are other reasons we discuss below). “Rebuilding the car engine” as the company described this major refresh to us delivers multi-bitrate and variable-speed playback, and lays the groundwork for even more product feature advances down the line. The embeddable playlist widgets let customers embed collections of videos into web pages — and then make them searchable using Panopto’s Smart Search technology, while also supporting one-click recording and upload workflows into their existing LMS and CMS platforms (e.g., SharePoint, Drupal, and WordPress). The company has updated its LMS integrations to use the new snap-ins, enhancing its customers’ experience with Canvas, Blackboard, Moodle, Sakai, and BrightSpace (formerly D2L). Finally, the new video capture appliance — their second such appliance — supports three configurations for capturing and live streaming video. There are three input options for the 1U rack-mountable device: single-channel HD + SD input, dual-channel HD video input, or quad-channel HD video input — all depending on the DataPath capture card utilized in the box at time of purchase.

What Alan thinks: This is a big release for small fry but ambitious Panopto, and an odd one to write about because it combines “big doings” (refreshed encoding
pipeline) with nitty gritty incremental additions that the most video-philic of end users will appreciate. It’s true: if Panopto is doing multi-stream using HTML5, yes it is probably among the first (my colleague Steve Vonder Haar informs me). I have to confess that when I first heard of their emphasis on Silverlight some years ago, I was concerned that they were betting on the wrong horse. The betting game continues, as Panopto is now betting on a future that may take enterprises some time to reach. From the enterprise perspective, HTML5 is no immediate panacea.

Panopto’s past Silverlight focus meant that a Panopto client would create a Windows Media video using video (WMV9 / VC-1) and audio (WMA) codecs, relying on the Panopto server to convert these to Silverlight smoothstream so the stream could be multi-bitrate. In the new scenario, a recording takes place using HLS, H.264 video, AAC audio, and multiple bitrate encoding also takes place at that same client, and then is sent to the server. This improves the ability to “fastpath” that video content already formatted in multi-bitrate fashion. To some degree this is future-proofing a buying decision today, but Panopto (as it admits) is doing this by necessity as Silverlight goes away. And as it goes out of its way to proclaim, it is laying the groundwork for future live streaming to mobile devices, and from iOS devices — at 60fps. Someday. We know Sonic Foundry can also do live streaming among the key Panopto “lecture capture” competitors.

Having Seneca Data be the fulfillment arm for the appliance is the right move, so clearly the company that started as a PC-to-cloud-based platform is finding traction for those that want to roll their own. More to the point, the appliance responds to Panopto customer feedback that some users want the higher end device being delivered here with multiple input options, while others want a low-end, low-entry-priced single-channel HD + SD version. List prices I’m told will range from $2,500 to $4,000 per box. Say a customer buys one of these appliances with a Panopto license. When it arrives, it is preconfigured to point to their Panopto servers as follows: it will post to cloud-hosted customer instances in the cloud, or will point to on-prem servers, depending on the license.

This set of updates continues Panopto’s evolution from being a video capture and management system to what it hopes to be when it grows up: a more extensible platform that easily integrates with existing IT infrastructure. Panopto has more on deck that will speak to IT organizations. So another of Panopto’s bets: will IT continue to be the driver for educational and business video adoption? That’s a somewhat safe bet even as the company is also making some other bets as well. Missing in action: the play to the non-IT buyers, who increasingly are a formidable force in such purchasing decisions.

Score at Halftime: WebRTC 2, Lawyers 0

Andrew W. Davis

Well, just three short years after Google proposed WebRTC as a browser-based, plug-in-free, HTML5-powered technology for voice and video communications as well as screen sharing, the IETF has taken a giant step in resolving the endless technology / political / licensing squabbling over the video codec. The result is a recommendation that to be WebRTC-compliant a browser must support both H.264 and VP8. This recommendation by the WebRTC committee must now be approved by the IETF. Whether this recommendation represents the end of the beginning or the beginning of the end (thank you Winston Churchill) for WebRTC battles remains to be seen.

Background points to ponder:

- Royalties, or even royalty disputes can be show stoppers when you are trying to create a universal, no-cost-to-customers communications solution.

- While the WebRTC audio codecs (G.711 and Opus) were selected long ago, the IETF has been deadlocked over whether to go with: 1) H.264 for video (which has a royalty cost associated with its use but is supported in microcode by many chips and is already installed in many systems, including your favorite room video conferencing devices and DVD players) or 2) VP8, which was contributed royalty-free by Google.

- About a year ago, Cisco announced that Cisco would release both binary and source code versions of an H.264 video codec called OpenH264 and pay all royalties for its use to MPEG LA themselves — this was for any software that uses Cisco’s precompiled binaries (thus making Cisco’s OpenH264 binaries free to use). We believe the standard H.264 license fee is $0.20 per unit with a maximum of $5M per year.
so the incremental cost to Cisco was low, although not zero. MPEG LA is a US-based company that licenses patent pools required for use of many MPEG variations. As Cisco has done for H.264, so could Google for VP8.

- Cisco’s OpenH264, available for free from Cisco’s web site, is already in use in Firefox (alongside VP8). Firefox, Chrome, and Opera already support WebRTC, and Microsoft recently announced its intention to support WebRTC also (along with a Skype for Web implementation which surely must be based on IE).

Note: due to licensing agreements, the OpenH264 has to be downloaded from Cisco — the codec can’t be distributed with the browser. Cisco has worked with Mozilla to make this download passive in the background — and the user pays nothing.

- “WebRTC-compatible” endpoints will be allowed to use either codec, both codecs, or neither codec in the case of data-sharing-only devices. So even a device that for some reason could implement only one of the video codecs can be sure to be compatible with any WebRTC-compliant browser.

- The royalty and licensing situation around video codecs is not fully resolved. A big concern is a Nokia claim that VP8 violates one or more of Nokia’s patents. The case is being litigated somewhere in Europe since Nokia has not only failed to settle with Google, but also stated that it won’t license its intellectual property under any conditions (or at least as long as the company is solvent). If Nokia wins this lawsuit, it is likely that VP8 will be removed from WebRTC altogether.

- Where is Apple in all this? Silent? Claiming to avoid VP8 because of the Nokia issue.

**News in Brief**

- **Canon** has partnered with **SMART Technologies** in the Oceania region to provide SMART’s products to its markets. Canon appears to be distributing both business and educational products and services.

- The **Voxbone** team has added **Orange Business Services** to its list of partners. OBS will use Voxbone’s virtual local phone numbers to extend the reach of its voice services for its international customers. Orange Business Services is a global operator and integrator of communications solutions and serves over 3,000 multinational business customers. It will now be offering Voxbone’s Direct Inward Dialing (DID) numbers as part of its Contact Center, Voice & Enterprise Unified Communications (UC) solutions.

- **Carousel Industries**, provider of UC, managed services, data solutions, and security, announced that it has extended its SmartPoint Guard managed services offering powered by Clone Systems to include voice and video data protection. Customers can use the SmartPoint Guard program’s suite of network security services that consistently monitor and detect for malicious activity, while preventing intrusions and improving compliance for enterprise customers. (SmartPoint Guard consists of Clone System’s proprietary monitoring and security solutions, coupled with Carousel’s integration and managed services.)

- **BT** announced the launch of Cisco’s Collaboration Meeting Room (CMR) Cloud, adding the new service to its extensive portfolio of Unified Communications and Collaboration products and services. Building on its earlier launch of One Cloud Cisco (HCS), Cisco CMR brings full integration with BT’s MeetMe voice conferencing service. The new service with be available globally with BT MeetMe by the end of the first quarter of 2015.

- **Digital Samba**, based out of Barcelona, has launched a new version of its OnSync web conferencing solution. Release 4.2.9 extends its feature sets for webinars, virtual classrooms, and white label partners.
A few worth noting: 1) the ability to host and control webinars and virtual classrooms from mobile devices, using OnSync’s Media Library with its mobile client; 2) support for multiple screens when screen sharing; 3) new templates for brand-able emails for white label and server customers; and 4) the ability to show multiple content items at the same time. That latter capability lets each content window display a mix of content, such as PPT, PDF, and YouTube videos.

- **Acano** last week announced the addition of four new Australia-based partners to its partner network. New partners Insync Technology, Coevo, InViewUC, and Pro AV Solutions join Dimension Data in the region.

- China-based **Huawei** announced the introduction of the RSE6500 video conference recording and streaming engine. The device provides 1080p, 60 frames per second (fps) capabilities, enabling recordings for point-to-point or multipoint calls, live streaming, and mobile Video-on-Demand (VoD). The device supports VoD based on HTML5 technology or through a built-in player.

- Russia-based **TrueConf**, who we interviewed in the WR Bulletin two weeks ago, had several recent announcements. First, the company introduced TrueConf Server Free, a free enterprise-oriented UC platform that provides conferences for up to six participants, with access to all group conferencing modes in resolutions of up to 4K (UltraHD). The Free version is a special license for the TrueConf Server. In a separate bit of news, TrueConf Server 4.3.0 now supports H.323 endpoints, widescreen video, and slideshows in conferences involving WebRTC participants, as well as improved connection quality on SIP devices. In addition, TrueConf for Windows 6.5.0 and TrueConf for Android 1.2.2 have been released.

- In a first for this industry veteran, **ClearOne** announced on Tuesday that its Board of Directors has declared its first-ever cash dividend, of $0.10 per share of common stock, payable on January 5, 2015 to shareholders on record on December 12, 2014. The Board plans to do this regularly. All hail dividends!

### People & Places

Know someone in the industry who changed jobs? Jump into a new role yourself as vendor, end user, or channel partner? Email us at wrb@wainhouse.com to share the good news.

- **Avaya**, Jeff Sheard, Head of Enterprise and Government Sales, ANZ; Isabel Botha, Corporate Counsel, ANZ
- **Crestron**, Patrick Stewart-Blacker, Director of Unified Communications, EMEA
- **Prysm**, Glenn Wastyn, vice president of Europe, and Rod Wheeler, regional director of sales for UK and Nordics
- **SoundConnect**, Darren Suders, Director of Channel Development and Sales
- **UNC Lineberger Comprehensive Cancer Center**, Tim Poe, Director of Telemedicine
- **Westcon Group**, Steve Garrou, Executive VP Strategy & Solutions Development, Adam Kuta, Executive VP and CIO.
Best Practices for UC Deployment Webinar

In this live 45-minute webinar to be held at 10 AM PST, 1 PM EST on Wednesday, December 17, 2014, Logitech and Wainhouse Research will host a panel of experts discussing what worked, what didn’t work, and what advice they would offer to others who are investigating the next generation of products and services for enterprise communications. Moderators include Bill Haskins and Andrew W. Davis of WR and Isabelle Coste, Senior Director of Worldwide Marketing with Logitech, to be joined by this panel of experts:

• Chris Bottger, Sr Vice President - Collaboration Services, IVCi
• David Danto, Principal Consultant, Dimension Data
• Brian Wheeler, Enterprise Services Unified Communications Global Delivery Manager, HP
• Kyle Severson, Unified Communications Solution Architect, Kimberly Clark

This is the first of a series of web seminar on collaboration that will be held in upcoming months. Click here to register.

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Audio Conferencing

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Market Sizing & 5-Year Forecast of Revenues from Suppliers of Audio Conferencing Bridges

Conferencing Service Provider Statistics (SpotCheck) – Q3 2014
This study details the calendar Q3 2014 trends of the worldwide collaboration service provider (CSP) market. Data is provided for audio and web conferencing services.

Visual Collaboration and Audio Visual

Immersive Telepresence - Back from the Dead
Cisco Releases the IXS5000 Series of Video Conferencing Endpoints

Video Conferencing Industry Statistics (SpotCheck) – Q3 2014
Quarterly report providing statistics on video conferencing sales revenue, units, and market share

Streaming & Webcasting

2014 Enterprise Managed Webcast Services Market Sizing and 5-Year Forecast
This study focuses on the worldwide market for providers of the enterprise managed webcast services.

Qumu Acquires Kulu Valley
This briefing note highlights and evaluates key objectives of the Qumu purchase
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