

Did You Miss the Wainhouse Research Summit in Boston?

Then check out the [webcast archives](#) provided by Stream57.

News in Brief

- **DesignNET International** unveiled its new SMART Analytics and Reporting Platform for Videoconferencing Service Managers. The company's Service Management Analytics and Reporting Technologies platform is a software solution (available as a service) that provides enterprise videoconferencing service managers with an environment for consistent, timely, and flexible reporting on usage, service quality, and operational efficiency and is also useful for capacity planning, usage analysis, cost allocations, and some troubleshooting. One of DesignNET's customers, **Adobe Systems**, presented at the recent Wainhouse Research Collaboration Summit on Adobe's use of the "on-the-fly" analytics package and the benefits provided to Adobe by the software solution. In separate announcements, DesignNET announced sales and support agreements with Telaid and Omnipresence.
- Demonstrating once again that the company should not be ignored in the enterprise communications market, **Avaya** announced a raft of new products and product enhancements in July. Focusing on the company's commitment to SIP and the Aura software as a platform for unified communications and communication-enhanced business processes, Avaya is touting scalability and cost savings as well as new functionality. The details would fill a newsletter by themselves, but basic elements consist of Avaya Aura Communications Manager 6.0 which facilitates hybrid deployments of SIP, H.323, and TDM endpoints; ACE 2.2 (the agile communications environment) with a new Event Response Manager; Aura Messaging 6.0; Presence Services 6.0; and Avaya Aura Session Manager 6.0 which can scale to 100,000 users, and a conferencing solution that supports audio, video, and web off a single server..
- In an unrelated but related announcement, Avaya and HP announced a three-year strategic agreement to add elements of Avaya's Unified Communications (see above) and Contact Center products to the HP Unified Communications and Collaboration services portfolio for enterprises. This solution set is to be sold and delivered by HP. Think of this as the combination of Avaya products and technology with HP's consulting and IT outsourcing expertise. Think of this as a counterweight to the Cisco onslaught.
- **Polycom** has updated its video bridging infrastructure story with the introduction of the RMX 1500

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and the new processing engine dubbed the MPMx media processing module. With a single MPMx blade, the RMX 1500 provides resources for 360 voice ports all the way down to 30 HD720p30 video ports or 15 HD1080p30 video ports. The new hardware is part of the new marketing moniker "UC Intelligent Core" which also includes CMA, DMA, and RMX 2000 and 4000. The company is offering an aggressive trade-in policy for customers who want to swap out their MGC systems. There is also an upgrade program for customers who want to swap out their RMX blades. In an unrelated announcement, Polycom has formed an alliance with **McAfee** to incorporate McAfee's advanced threat protection solutions, including the ePolicy Orchestrator console, into Polycom UC endpoints and Intelligent Core. In addition, the two companies will align monitoring and provisioning tools to deliver secure device configuration and compliance capabilities. Last month the company announced the CX500, CX600, and CX3000 phones for use with **Microsoft** Communications Server 14.

- **Compunetix** has released CONTEX Connections, a simple and efficient application that allows mobile smartphone users (Blackberry) to create, manage, and control audio conferences directly from their smartphone devices.
- **NTT**, a Japanese-based service provider with over \$100 billion in annual revenues and nearly 200,000 employees, has made an offer to acquire 100% of **Dimension Data** for about \$3.4B. The acquisition is subject to various regulatory and governmental approvals, and we anticipate will take until October, 2010 to be completed in full.
- UK-based audio-conferencing service provider **Powwownow** announced the acquisition of UK-based service provider **Yuuguu**, confirming our analysis of just how hard it is to find good company names in the UK.
- **Aethra net**, an Italy-based value-added collaboration services provider and Oslo-based **Videoworks**, a company holding an OEM agreement with Sony Japan, have signed an agreement for exclusive distribution for Italy.
- **LifeSize** announced software v4.7 that supports data sharing (and streaming via the LifeSize Video Center) using the company's Passport system and the LGExecutive. LifeSize Virtual Link, enables data sharing with a PC or Mac. Desktop v2.0 software now supports data sharing and 720p transmit. The company also broadened its infrastructure portfolio. The new LifeSize Transit client, available as either a hardware appliance or a virtual machine option, combined with the Transit server, provides a complete NAT/firewall traversal solution. LifeSize Control has been enhanced with the release of v5.0 as well.

Introducing one of the WR Bulletin Sponsors

Vaddio brings sophisticated PTZ camera technology within everyone's reach. Our commitment to simplicity and value has made us the leading designer and manufacturer of specialty PTZ cameras, high-end camera control systems and contemporary furniture used in the broadcasting, audio/visual and videoconferencing industries. From mounting hardware and cabling to CCU technology, Vaddio provides everything you need to transform a camera into a complete solution.

Vaddio products are integrated globally in facilities ranging from television studios to houses of worship, government facilities, educational institutions and corporate conference rooms. They also set the standard for reliability in mobile live broadcasts.

Vaddio was founded to redefine camera control, and in the process we've revolutionized an industry by making cutting-edge, innovative camera technology easy to integrate, install and use.

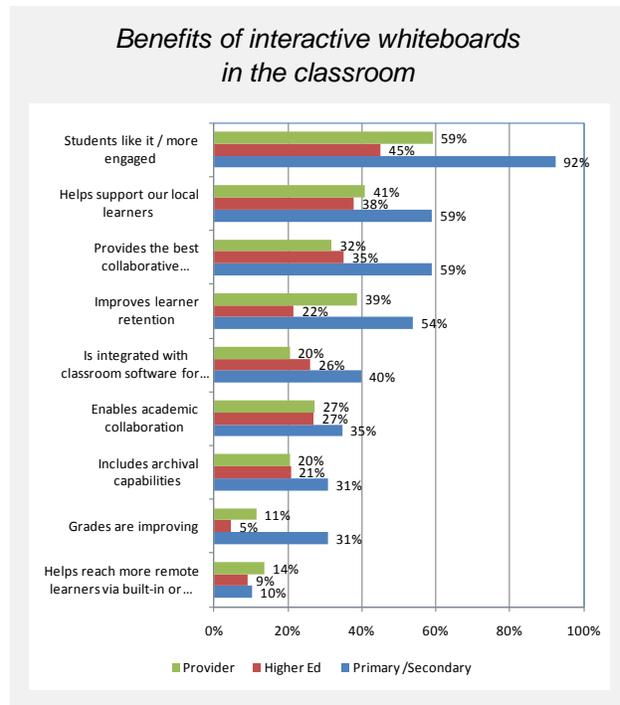
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- We caught wind of an interesting interoperability session run by BT Conferencing. The image below came from a laptop screen running a Movi client. On the top is a Cisco CTS 3000 and in the middle is a Tandberg T3; bottom right is a Polycom RPX and the handsome guy on the bottom left is sitting in front of a Tandberg T1700.



- **ooVoo** reports that in a blind study, 8 out of 10 **Skype** users prefer ooVoo.

- Hot off the press is **WR's new Distance Education and e-Learning survey** of over 300 educators, which assessed eight key distance education technologies. Among the findings: the purchasing / sales model is the top buying criterion for lecture capture in higher education, and that 92% of primary / secondary educators who use interactive whiteboards believe they are effective at engaging students. This report is available as a part of our new EDU subscription service. [Download the executive summary and full question list.](#)



- **Global Crossing** has announced a managed service that knits together telepresence and existing collaborative services, including audio conferencing and videoconferencing as well as streaming services from ON24. In a separate release, the company announced social media interfaces to its Web Meeting 11.

- **Radvision** launched its Apple iPad control application for video conferencing room systems. The system was demo'd to great acclaim at the WR Collaboration Summit in Boston. Features of Scopia Control include joining meetings from the integrated conference room calendar with a single click. Users can also place calls, access a corporate directory, and a list of previously placed calls through the touch screen interface of the iPad.
- **VenueGen** announced a new release of its 3D virtual meeting and training platform targeted at the enterprise collaboration market. According to VenueGen, the application is similar to using a telepresence room, but features the pricing, accessibility and practical usability of a browser-based web conferencing tool.

New WR Content

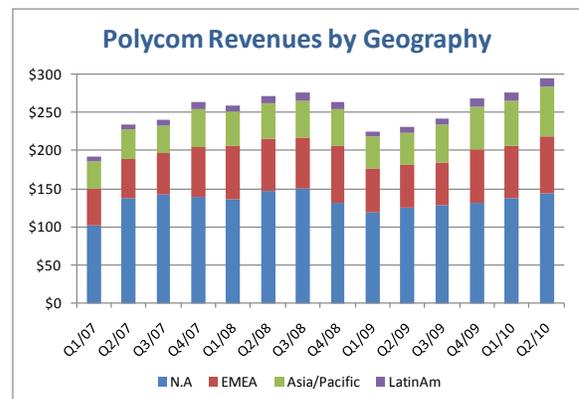
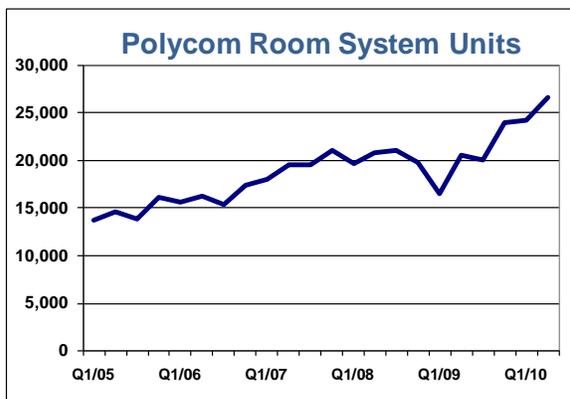
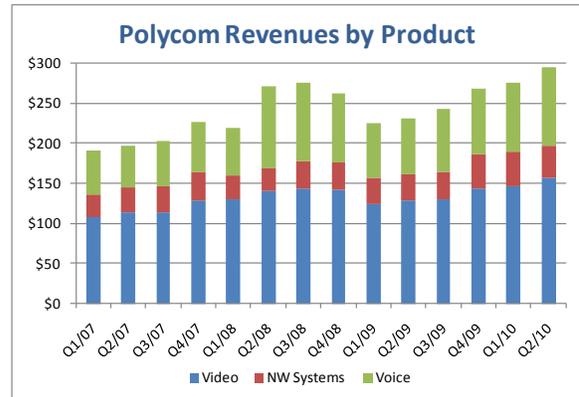
Subscription	Document Title & Link	Description
WebMetrics	First Half 2010 Survey Report - User Trends in Web Conferencing Usage, Perceptions, Preferences, & Plans	This survey study focuses on web conferencing brand perceptions, product functionality, and feature set preferences.
UCP	North American Hosted/Managed Unified Communications Services Forecast	Part 2 in three part series examining the worldwide hosted and managed UC services market with 26 provider profiles, 178 pages.
UCP	North American CSP Market Opportunities 2010	Part 2 in a three part series examining the worldwide conferencing services market focusing on the US and Canada.
UCP	European CSP Addressable Market Sizing 2010	Examines the addressable market size for conferencing services in 12 Markets.
UCP	North American CSP Addressable Market Sizing 2010	Examines the addressable market size for conferencing services in the United States and Canadian Markets.
EDU	Lecture Capture Solution Capabilities Comparison Matrix	Compares offerings from Accordent, Cisco, Echo360, Panopto, Polycom, Qumu, Sonic Foundry, TechSmith, Tegrity, and 323link.
EDU	Distance Education and e-Learning Survey	Survey of over 300 educators, finds that purchasing / sales model is the top buying criterion for lecture capture in higher ed.
EDU	Personal Learning Networks: A New Model for Collaborative Learning	Defines the components of a recent Web 2.0 phenomenon, PLN's, as a means of gaining skills and knowledge
VCP	Cisco, C-Scape and Collaboration	Wainhouse Research's thoughts and impressions after attending Cisco's annual analyst conference.
VCP	Enterprise Videoconferencing Endpoints & Infrastructure Products Forecast	WR's estimate of the current market size and 5-year forecast for the enterprise videoconferencing endpoints & infrastructure market segment.
VCP	A Test Drive of Leadtek's AMOR 8A10 Portable Multimedia Phone	Insight and analysis into the capabilities and performance of the AMOR 8A10 Portable Multimedia Phone.

Dollars & Sense

Polycom Q2-2010

Polycom reported revenues of \$295 million for the quarter, compared to \$231 million for Q2-2009.

PLCM	Q2/09	Q1/10	Q2/10	Sequential Growth	Annual Growth
Video	\$128.7	\$146.0	\$157.0	7.5%	22.0%
Network	\$33.0	\$43.0	\$40.0	-7.0%	21.2%
Voice	\$69.0	\$87.0	\$98.0	12.6%	42.0%
Total Rev	\$230.7	\$276.0	\$295.0	6.9%	27.9%
Group Units	20,522	24,210	26,590	9.8%	29.6%
Op Inc.	\$21.4	\$15.3	\$15.9	3.9%	-25.7%
N.A	\$124.7	\$138.1	\$144.1	4.4%	15.6%
EMEA	\$55.9	\$67.6	\$74.5	10.3%	33.3%
Asia/Pacific	\$43.2	\$58.9	\$64.8	10.1%	50.0%
CALA	\$6.9	\$11.6	\$11.5	-1.0%	66.0%
Video ASP	\$6.27	\$6.03	\$5.90	-2.1%	-5.8%



As can be seen from our charts and table, 1) revenue was at a record high; 2) annual growth was strongest for the voice products line and for the CALA region, and the video ASP is dropping. While the number of “units” shipped is at an all-time high, it is not clear exactly what the company is including in those numbers – our own opinion is that we don’t consider the videophones to be room systems nor the CX 5000 (RoundTable systems) which is the video equivalent of a webcam.

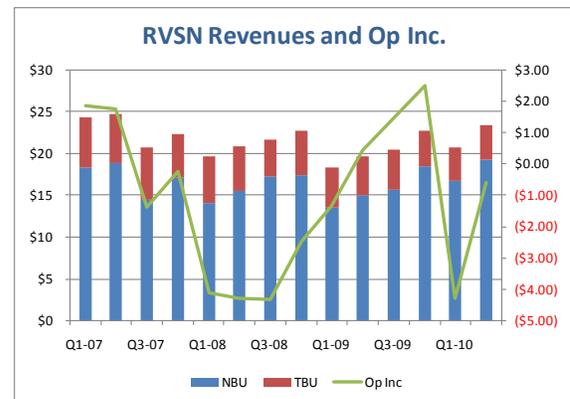
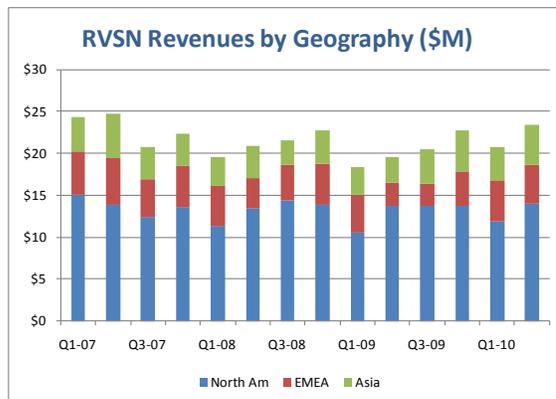
Avistar Q2-2010

Avistar reported total revenue for Q2 was \$1.0 million compared to \$2.9 million for the quarter ended June 30, 2009, reflecting lower product and services revenue during a period of intense new product development. Operating expense was \$3.3 million for the second quarter of 2010, as compared to \$2.8 million for the year-ago quarter.

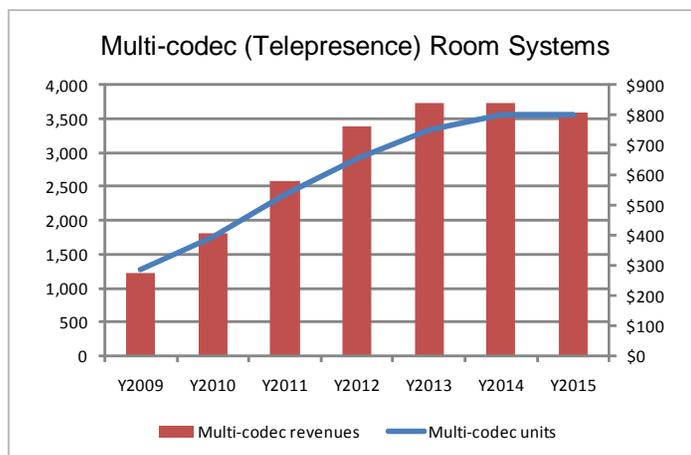
RADVISION Q2-1010

Radvision reported Q2 total revenues of \$23.3 million, an increase of 19% year over year. The revenues were also about 6% above forecast. While the company didn't give out detailed information, the press release did include the nugget that endpoints contributed more than 10% of the Networking Business Unit (NBU) revenues – this is the “products” side of Radvision’s business. So, while our table shows \$19.2 in product revenues and 28.2% annual growth, it would appear that Radvision’s infrastructure products alone grew at an annual rate of about 14% and that the remainder of the growth spurt is due to videoconferencing endpoints. We believe the company began shipping its VC240 executive system (a collaboration with Samsung) in Q1 and its SCOPIA XT1000 product line during Q2.

RVSN	Q2-09	Q1-10	Q2-10	Sequential Growth	Annual Growth
Products*	\$15.0	\$16.8	\$19.2	14.7%	28.2%
Technology	\$4.6	\$4.0	\$4.1	2.8%	-10.7%
Total Rev	\$19.6	\$20.8	\$23.3	12.4%	19.1%
NA	\$13.8	\$11.9	\$14.0	17.7%	1.7%
EMEA	\$2.7	\$4.8	\$4.7	-2.6%	72.3%
Asia	\$3.1	\$4.0	\$4.6	14.7%	50.1%
Op Inc.	\$0.42	(\$4.27)	(\$0.60)	NA	NA



New Videoconferencing Forecast



Wainhouse Research has published our annual videoconferencing industry forecast, now included as part of the Visual Communications Practice (VCP) subscription service. The chart below is for one segment of the industry – the multi-codec (telepresence) room systems. Details are in the full report.

People & Places

Siemens Enterprise Communications, **Chris Hummel**, Chief Marketing Officer

BroadSoft, **Holly Dowden**, Director, Product Marketing

VC-Net, **Chris Wade**, Executive Chairman

The Whitlock Group, **John Bailey**, Director of Systems Integration

Tata Communications, **David Rosenzweig**, Telepresence Operations Realization Lead

Conferencing & Collaboration Events

When & Where	Who & What
October 3-6, Ft. Lauderdale, FL	VCI-G annual conference
October 12, Boston, MA	Wainhouse Research CSP Summit - North America (now taking registrations ; save \$100 before Sept 21)

Letters:

Andrew: I just had to drop you a note about how terrific I think the Summit was. I watched most sessions on line – and I enjoyed all of the topics a good deal, and thought you had picked the most relevant and thought provoking topics... Emily T. Magrish (etmagrish@msn.com)

WR Collaboration Summit – 2010



The Summit crowd is always attentive



Audience participation is encouraged



Fielding questions about whether UC really delivers



From the world cup to the Summit, the vuvuzela signaled the end of the coffee break



One of the event's fabled panel discussions



Walking the walk: Controlling a videoconference from the iPad



Checking out the robot roaming around the demo area



Discussing managed services for a world-wide deployment

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