WAINHOUSE Research

News & Views
on Unified Communications & Collaboration

InfoComm14 Topline

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Wainhouse Research and 42,000 of our closest friends squeezed into the Las Vegas convention center last week to catch the eye candy at over 700 infoComm14 exhibitor booths and to attend over a dozen sessions organized by the **IMCCA**. You needed roller skates or a **Segway** to stand a chance. Trying to cover the show for the *WR Bulletin* reminds me of the old joke about seven blind men feeling an elephant, but it seems clear to me that major happenings are taking place on at least three different fronts. If you see an asterisk next to a company I mention below, you'll know they are sponsoring or speaking at our 15th annual Wainhouse Research North American Summit in three weeks.

Video Conferencing in the Cloud: Everybody's talking about it, and now some people are actually doing it. Cloud was definitely the distinct undercurrent this year. The pace setter here is **Blue Jeans Network**,* the company that really established this services category. BJN's booth was jammed with attendees seeing the ability to host much larger meetings (up to 100 should anybody be crazy enough to attempt such) and a neat one-touch-to-record button which puts the recording in the cloud, not on any endpoint. Not far behind is **Videxio**, another focused VCaaS company showcasing *MyVidexio,* a new and easier way for users to manage their video conferencing experience. Besides being focused on only video as a service, Videxio is also focused on only channel partners as a go-to-market strategy. This approach has influenced everything from Videxio's software and infrastructure strategy to their licensing and marketing according to the resellers and integrators we interviewed. Other vendors highlighting their "video

as a service" offerings included **StarLeaf*** (which claims to be doing over one million minutes per month) and **Lifesize**. Both of these companies have services that can be used with standards-based endpoints from other vendors, but also tie intimately to hardware from the companies themselves, offering users additional benefits in ease-of-use and cost. Lifesize Cloud supports iOS and Android clients and supports both direct-dial and meet-me conferences with up to 25 endpoints, and costs $25 per user per month based on a 25-user package. StarLeaf was also showcasing its new Group Telepresence system designed for AV integrators and businesses looking to equip very large meeting rooms, theaters, and auditoriums.

While not technically in the cloud business themselves, both **Pexip** and **Acano*** deliver cloud-enabling conferencing and collaboration solutions (thereby powering VCaaS offerings from channel partners and service providers) which can also be deployed on-prem.

At infoComm14, Pexip announced support for a variety of important security standards required by many US government agencies and improved presence capabilities for Lync users. Also announced are Remote Desktop Protocol (RDP) support for content sharing as well as their own installable client and Flash-based support for IE and Safari browsers. Under the hood, the company was also demonstrating a hybrid premises-cloud-based solution in the booth. Acano announced a stream of enhancements to its coSpaces platform, including support for **Skype** audio (video to follow), which complements Acano's list of browsers supported: Chrome, Firefox, Internet Explorer, Safari, and Opera. (Skype audio was also being demonstrated on video endpoints in **ZTE's** booth.)

> If there were three show stoppers in the video equipment space this year at InfoComm14, one was Array Telepresence, the second was in the Vidyo booth, and the third was Kedacom's H600-L.

Compunetix* demonstrated its new Summit Olympus platform for wideband (high definition) voice integrated with the company's Evergreen video MCU (which supports free native mobile apps for video). The neat catch here is that server software unites the two based on a meeting passcode. So those dialing in on audio are directed to the Olympus platform and those on video to the Evergreen platform, thereby not wasting precious video bridge ports for simple audio callers. All of this of course is transparent to the end user. Prior to InfoComm Compunetix also announced the newest version of its CONTEX Presenter web meeting software. Presenter 5.10.0 includes new features to enhance reach and accessibility of group communications and increase end user productivity.

We finally got to see **Synergy Sky** in action. They apparently rented a B777 to fly the whole company from Oslo to infoComm14 to demonstrate new functions and hardware support built into this infrastructure platform designed for video service providers and installable in the cloud and/or on the customer premises. Think of Synergy Sky software as a multi-tenant, multi-vendor conductor that makes intelligent, rule-based assignments of collaboration resources. Synergy Sky announced at the show new customers **Tata Communications**, **SKC**, and **Video Guidance**.

Video Conferencing in the Room: If there were three show stoppers in the video equipment space this year at infoComm14, one was **Array Telepresence** showing an alpha or beta release of its image processing engine ($10K-14K) and camera design that provides a "telepresence experience" on a simple room display system. The Array system, designed by one of the pioneers in telepresence, is hard to describe in words but easy to understand with a demo. The intrigue here is will anybody fund this operation? The second show stopper was in the **Vidyo** booth where the company was showcasing a large screen 4K display combining a multipoint video call with very high resolution content (4K support was shown by TrueConf in January at the ISE show). Besides the fantastic user experience, the other side of the story was the low cost. The system was running on a low-cost **Intel** computer. The other show stopper was innovative because of its price point. **Kedacom's** H600-L is a 1080p system with a 3x PTZ camera and full support for all the traditional standards with a new low MSRP of $999.

Polycom demonstrated several new capabilities, some of which were announced earlier this year, including the "acoustic fence" which blocks out background noise, and a WebRTC interface to the company's infrastructure. While the WebRTC demo software was in public view, we can only comment that when it is a released version, Polycom promises some twists to the typical WebRTC capabilities. On a more subtle front, something that we have alluded to in recent months, Polycom does seem to be making an important turn into the content management wind. At InfoComm14 we learned that Video Content Management is now part of a SmartStart bundle and can be implemented in either hardware or software, as is the case for all of Polycom's video infrastructure product line.

Our Russian friends from **TrueConf** were demonstrating multiple clients, including WebRTC, in a multipoint call hosted on the company's server intended not for cloud implementations but for CPE. Part of the company's marketing push is to offer the server as a free service (servers located in California and NJ as well as in Europe), with limited functionality, in order to attract customers. This is working in Russia, but not yet in North America.

Cisco strengthened its claim to having the sexiest video conferencing hardware in the industry. I got to see the newest proof point in the DX80, which Dave Michels

covered for us in the *WR Bulletin* . The "DX" signifies that it is a telephony product, part of the Call Manager universe, and in fact the system requires Call Manager. Color me impressed.

Also to note, **Microsoft** had the largest booth on the infoComm14 show floor, approximately 120 x 80 feet. Nice carpeting, nice couches and coffee tables, and even a flat screen display or two (World Cup). But no computers, no Microsoft people. Word was they had the booth all ready to go for an announcement that somehow didn't happen. Lots of guesses behind this PR fiasco.

Collaboration in the New World. Collaboration was a buzzword on the show floor, with many vendors talking their collaboration focus, but three demos really stood out. The most unusual was certainly Mezzanine by **Oblong**. It is hard to describe in words, but Oblong and the movie "Minority Report" have a lot in common when it comes to user interfaces and data display. With Mezzanine, everyone in the meeting has the control ball (in this case it is actually a control wand) all the time and all screens in the room are combined into one gigantic palette. Within the room it is an amazing experience, but I wondered how long it takes a user to learn to use all of the system's capabilities. **SMART Technologies*** drew an impressive crowd with its new SMART *kapp* system, a very simple whiteboard / ink marker system

that captures, saves, and pushes content to mobile clients in real time. Currently available as a free download for iOS and Android users (with Windows mobile support coming soon), the SMART kapp app enables users to pair their tablets or smartphones to a SMART kapp board with a scan of its unique QR code or a tap of its NFC tag. The kapp board talks to a local device over Bluetooth and the local device uses Wi-Fi to get to the cloud. The app activates live web-sharing with up to five users, access to a snapshot library, PDF and JPEG save & share, and Evernote. The 42-inch version is $899 MSRP. The company also announced 13 channel partners will resell SMART kapp, one of them **Teq**, with which it has partnered to sign a statewide deal with the state of New York to sell SMART software through the state's regional service centers. **Prysm*** recently acquired **Anacore**, a custom software development firm. The result is an impressive multi-touch-screen collaboration system that can run on one large flat panel display or on a video wall built from Prysm's zero-bezel display tiles. The result is content plus annotation that can mirror what's on screen to any other room system around the world. Like the Mezzanine solution, the Prysm collaboration experience is totally immersive.

What Andrew thinks: There is a not-so-subtle shift that has occurred in the video conferencing industry. Performance has pretty much peaked at 1080p and

wideband audio with nearly every endpoint supporting these features.   The three-screen telepresence market is in decline and the telepresence hype has pretty much evaporated, although a few vendors continue to use the "telepresence" nomenclature. The focus now appears to be on true value creation with collaboration and real ease-of-use at the forefront of the infoComm14 exhibition. And everyone from mom-and-pop resellers to hardware vendors to multinational carriers seems to be getting into the VCaaS game. Expect to see significant fallout here, despite very exciting market growth rates.

Sonic Foundry Ingots

Alan D. Greenberg, agreenberg@wainhouse.com

Sonic Foundry made a number of announcements at InfoComm14 and the overlapping **UBTech** conference. First, the company announced the latest release of Mediasite 7, including the debut of its Mediasite Showcase, an interactive portal for organizations to collect, spotlight, and share their live and on-demand video content with private and public communities. Showcase encourages content discovery with Mediasite's SmartSearch and social sharing. Its interface allows people to browse videos by channel, popularity, recent views, and more, enabling organizations to quickly build powerful online video experiences.

Other announcements include a new Mediasite mobile app for the iPad (Version 2.0, not yet for Android) meant to better replicate the desktop experience, while allowing users to browse, search, and watch any Mediasite video both on and off cellular networks; a new set-top capture device, the RL100, a $4,995 MSRP appliance designed for technology-light rooms that leverages Mediasite by supporting on demand video content routing, but not live streaming; a Video Conferencing Recording Service, which extends video conference sessions by seamlessly capturing, archiving, streaming, and managing video meetings (H.323 and H.239 content) in the cloud; and a Mobile Upload capability that enables the capture of video on any mobile device and uploading of that content to Mediasite.
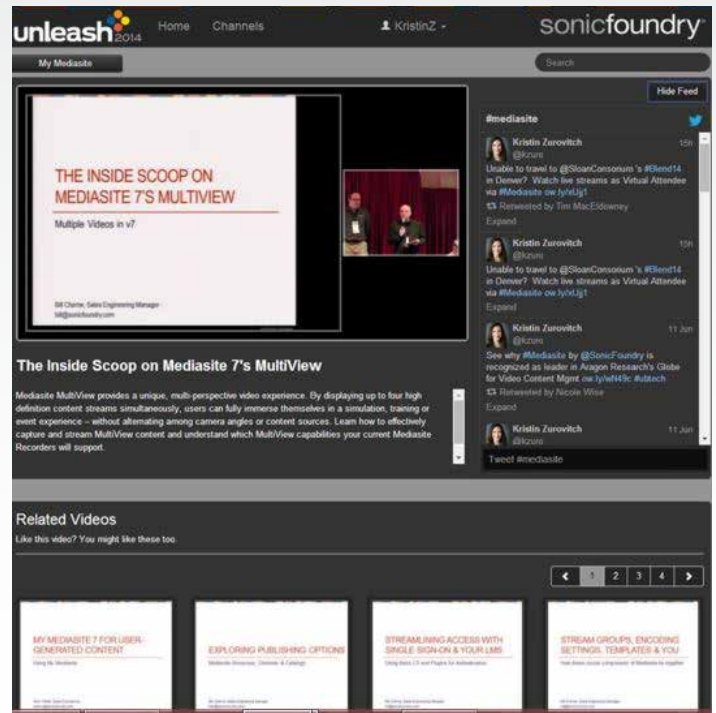
Mediasite Showcase with Social Sharing

What Alan thinks: Like the little engine that could, Sonic Foundry keeps chugging along with incremental additions that over time are starting to add up. Where they were playing catch up for a time, they can boast accurately that they are caught up to the competition when it comes to the user experience. The functionality, the breadth of capture and endpoints and delivery mechanisms are all where they need to be. And from a software perspective they have addressed what I have been shouting for several years now was coming: vast quantities of user-generated content.

Sonic Foundry's goal is to provide for flexible capture, delivery, and access options, regardless of where someone may be located. They have enriched the ability to navigate Mediasite, with lots of user choice regarding how to place or find content (multiple timelines, presentations grouped individually or in batches and at the folder or individual level). Showcase adds flexibility to the Mediasite playback experience, enabling end user organizations to build social environments around content (not a new concept) and customize / brand the

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environment for their organization. The product update is a clear shot across **Kaltura's** bow that could spark a new type of video arms race in the education segment (see *News in Brief* to read about Kaltura's own escalation of the arms race).

My colleague **Steve Vonder Haar**, who knows about these things better than I, points out to me that network management and administration features within the Sonic Foundry solution remain less robust than those offered by some of its enterprise-focused rivals. From Steve: "I have questions on how well Sonic Foundry can sustain its pace of innovation. The company touts an ease of use and reliability that stem largely from Sonic Foundry's in-house development of every step of its content workflow. Over time this closed loop emphasis could make it more difficult for Sonic Foundry to integrate best-of-breed features from other software developers."   OK, I concede. But with their acquisitions in Japan and Europe beginning to bear fruit from a sales perspective, Sonic Foundry is on the move.

Keeping up the PACE
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Early this month Steve Vonder Haar and I had a chance to attend Polycom's analyst event in Austin — PACE — held to overlap with their Customer Council meeting. The purpose of the event was not to introduce product, but to introduce the analyst community to new CEO **Peter Leav** and Polycom's "relatively" new management team that he has assembled over the past six months; discuss market directions; and pick the brains of the 16 or so analysts in attendance.

Major themes included the following: 1) Polycom is in great shape (cash in the bank, steady profitability) and the boat that had been rocking from executive turnover is now steadied; 2) Polycom continues to be transforming itself into a solutions company, though is not yet done with hardware (as if it ever will be); 3) Polycom remains focused on its core strengths, including voice, video endpoints, and video infrastructure; 4) Polycom is committed to its channels (SI's, A/V resellers, Service Providers) but when focusing on new channel partners, will be seeking those who "get" collaboration perhaps in some ways some past partners have not; 5) RealPresence and CloudAxis are performing well; and 6) a deeper focus on video content management is coming.

Analysts' Corner

I give Leav credit for a focused "keynote" sans PowerPoint (thank you!) that was on target, and "Leav's Logic" about rationalizing which executive briefing centers remain open was refreshing after seeing so many CEO's think the way to manage a company is mindless slashing of costs. Terrific event, mission accomplished. My colleague Steve — who lives and breathes video on demand — and I have assembled a short Analyst Corner talk with additional details.

News in Brief

- **AMX** announced during InfoComm that **Harman** has completed its acquisition of AMX. Among a slew of announcements too numerous to include here, AMX also announced that the Enzo Content Sharing and Conferencing Platform now supports screen mirroring, web conferencing, and macro sessions.

- **Alteva**, a provider of hosted Unified Communications, announced a new strategic partnership with master agency, **MicroCorp**, a national distributor of telecom and cloud solutions. This partnership expands Alteva's national channel while giving MicroCorp and its agents a tightly integrated UC portfolio, including Alteva's HD voice combined with **Microsoft Office, Google Apps** and CRM applications like **Salesforce.com**.

- Last week Cisco announced its intent to acquire privately held **Tail-f Systems,** a provider of multi-vendor network service orchestration solutions for traditional and virtualized networks. Tail-f's products are designed to help service providers and enterprise IT organizations implement applications, network services and solutions across networking devices. With Tail-f's network service orchestration

technology, Cisco's service provider cloud and virtualization portfolio will simplify and automate the provisioning and management of both physical and virtual networks.

- The new **Fuze** iPhone app is now available in the iTunes app store and their new Windows app is in Early Access release at the Fuze website.

- **Ricoh** showed off at InfoComm a portable business-class group video conferencing system that integrates voice, video, and data sharing. By combining two Ricoh technologies — the Unified Communication System P3000 (built on the VidyoWorks platform from **Vidyo**) and the PJ WX4141N Ultra Short Throw Business Projection System — individuals and groups can come together to collaborate. The P3000 connects up to 20 participants at once with the push of a button, activating a 94-degree wide angle lens that allows multiple people to be viewed in a room. A variety of screen layouts are available and up to nine participants can appear on the screen at one time; any participant can share their desktop with the group. The P3000 is available for an MSRP of $2,200 plus a $99 per month fee for a subscription to a cloud service and a $47 per month service fee for the apps. The Ultra Short Throw projector is available for an MSRP of $2,299.00.

- Supplier of scheduling and workflow automation software **myVRM** announced that their software, which includes modules that automatically schedule and launch calls, has been demonstrated to interoperate with the latest solutions from Polycom. myVRM works with Polycom's video infrastructure, management systems and endpoints, providing users with a single scheduling system that provides workflow automation for managing video, face-to-face meetings, resources, and services across the enterprise. Along with managing UC&C resource scheduling, users can schedule other room bookings, hot desks, catering, audio-visual services, facilities services, and notify security of outside guests. Users can schedule these resources using any of the myVRM interfaces: Web Portal, Outlook add-in, Outlook/ Exchange, IBM Lotus Notes, iOS, Android, or via an iControl panel.

- At InfoComm, **Winnov** unveiled the Cbox MR HD, its new lecture capture and webcasting solution that as they like to put it, "captures more with less." The new system is meant to provide small to medium-sized organizations the ability to easily scale and create rich experiences by significantly reducing the per room cost of deployment. Cbox MR HD includes multi-room capture technology, as well as "virtual camera" technology, which transforms a single video camera into a device able to provide an immersive, multi-view playback experiences. The Cbox MR HD also can be combined with Cbox Command Center, a centralized monitoring and management system providing a 360° view and complete control of deployments from any laptop, tablet, or smartphone.

- **Kaltura** announced at its Kaltura Connect 2014 event the launch of Kaltura CaptureSpace, its new lecture capture solution. CaptureSpace will be available for commercial use for the Fall 2014 semester. The new capture solution allows faculty, students, and instructional designers to easily create multi-source video recordings in-class, at home, or on the go, and automatically upload the videos to the Kaltura Platform, making them available for publishing in all leading Learning Management Systems and in Kaltura's MediaSpace video portal. Kaltura's open source video player now supports multi-device publishing of synchronized videos and slides that are captured by CaptureSpace or by other third party lecture capture products. The content that is produced via Kaltura CaptureSpace on PCs, mobile or tablets can be natively managed in the Kaltura Management Console. Those open-source savvy Kalturians are also launching an Open Capture Standard in conjunction with the launch of CaptureSpace. The standard provides a supposedly "easy" interface for any lecture capture solution to push its video recordings into the Kaltura platform to benefit from its ingestion, publishing and playback capabilities. Leveraging the standard will allow institutions to consolidate all of their captured content into one location, enabling effective discovery and reuse of content across the institution, transcending departments, schools, and semesters. Already supporting the Open Capture Standard are several lecture capture solution providers, including **Collaaj, Winnov, Cattura,** and **TechSmith**.

The Changing Collaboration Landscape at the Wainhouse Research UC&C Summit

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The news is out: new speakers are filling up the agenda for our Santa Clara Summit July 15-16.

- **The Power of Face-to Face for Business Collaboration — Oded Gal, VP of Product, Blue Jeans Network**, will provide insights into how face-to-face communication is taking a bigger role in business collaboration, and how the Blue Jeans cloud and Interop approach — with a focus on WebRTC and the browser — has contributed to that direction.

- **Who Wants the Learning Market? — Bob Lee, Principal, Collab.Learn**, will talk about how companies routinely use communications and collaboration solutions for learning yet no single vendor has found the secret sauce to dominate the learning market. Why? Hear from this former WebEx and Citrix product marketer for an insider's look at the online learning market.

- **Vendor Panel: Stepping Beyond the Meeting Room — Acano, AGT, Compunetix, StarLeaf, Dimension Data,** and **Yorktel** represent very different approaches to the universe of collaboration, whether audio, video, coSpaces, telepresence rooms, workspaces, you name it. Join OJ Winge, Jerry Pompa, Mark Cray, William MacDonald, and representatives of Dimension Data and Yorktel in a panel discussion on the implications of their particular approaches.

Oded Gal,
Blue Jeans Network

Bob Lee,
Collab.Learn

See Agenda ▶

OJ Winge
Acano

Jerry Pompa,
Compunetix

Mark Cray,
AGT

William MacDonald,
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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.

- Atlassian, **Bernardo de Albergaria**, VP & GM, Collaboration

- Carousel Industries, **Rhonda Wingate**, VP of Collaboration; **Kelly Lichtenberger**, VP Inside Sales, **Frank Douglas**, Mid Market Sales Director, Georgia; **Cindy Morgan**, Sales Director Northern California

- snom Technologies AG, **Markus Schmitt-Fumian**, CEO & Chairman of the Board

- Vaddio, **Ed Ellett**, President and CEO

Farewells

We regret the loss of **Frank Lyman III**, age 46, in a car accident June 21, 2014. Frank was Chief Product Officer at MyEdu, acquired by Blackboard in 2013, and was a thoughtful entrepreneur and visionary who still had much to contribute to the world.

Frank Lyman III, Chief Product Officer, MyEdu / Blackboard, 1968-2014

- vWise, **James Liberi,** Senior Vice President of Sales and Strategy

- Whitlock, **Bob Kiszka**, Account Executive

Bernardo de Albergaria, Atlassian

Markus Schmitt-Fumian, snom Technologies

Rhonda Wingate, Carousel Industries

Kelly LIchtenberger, Carousel Industries

Frank Douglas, Carousel Industries

Cindy Morgan, Carousel Industries

Bob Kiszka, Whitlock

Ed Ellett, Vaddio

Matt Collier

Anatoli Levine

1:1 Matt Collier, UCI Forum President and Anatoli Levine, IMTC President

Andrew W. Davis

The recent merger announcement by the **International Multimedia Telecommunication Consortium (IMTC)** and the **Unified Communications Interoperability Forum (UCI Forum)** led me to sit down with executives from the two organizations to explore what was behind this move.

WR: Why did your organizations decide to merge?

MC: Well, to start off, there was some overlap in missions and some overlap in members. The four-year old UCI Forum is or was an alliance of vendors committed to assuring a quality UC experience. This involved working to improve interoperability among UC products and services and defining best practices that remove the barriers to widespread adoption. Besides UC, the Forum also had groups working on networking technologies

as well as a video task group. Most recently we've been doing a lot of work to promote scalable video coding interoperability.

AL: The IMTC was different, but similar. The mission of the 21-year old IMTC is to facilitate the development and use of interoperable, real-time, multimedia telecommunications products and services based on open international standards. This work involves communications protocols, compression algorithms, and networking issues specific to voice and video over IP like NAT / Firewall traversal. So, you can see the two organizations were serving the same industry but from slightly different angles. You could argue that we needed more overlap, or less, but either way combining the two organizations into one will allow us to focus our efforts, eliminate overlap, and hopefully get to results faster. We also think the merged organization will appeal to more vendors and service providers.

WR: I'll come back to service providers in a moment. But first, what is the name of the new organization?

AL: The new organization will operate under the IMTC banner.

WR: How many members are there?

AL: The new organization will have about 50 members, of which 9 companies were previously members of both organizations.

MC: While generalization is always dangerous, it is fair to say that IMTC has a heritage in H.323 and video while UCI Forum had more of a SIP and unified communications background. Now of course, all these technologies are converging, which again is why the merger makes sense.

WR: Wasn't this merger story leaked by Edward Snowden?

AL: No

> It's not just about video conferencing; it's not just about unified communications or voice; it's about the fact that for many organizations these communications modalities are coming together.

MC: You're confused.

WR: Who does this merger affect? Why should anyone care?

MC: This is really all about trying to deliver value to end users by making products and services easier to use, easier to integrate. It's not just about video conferencing; it's not just about unified communications or voice; it's about the fact that for many organizations these communications modalities are coming together. Clearly your own research documents this trend. The merger puts video and UC under one roof, with teams and working groups helping each other to document and solve problems in a politically correct manner - which is to say in a totally non-political environment.

AL: To the extent that we are laser-focused on interoperability the new organization will deliver immense benefits to end users. This is the audience that all the vendors and service providers are trying to satisfy. The thing about interoperability is that like life itself, interoperability is a journey, not a destination. In an ideal situation, interoperability gives the end user the option of deploying best of breed solutions from multiple vendors.

WR: Yes, but isn't best of breed NOT in the best interests of any single vendor?

AL: In truth, probably yes. But interoperability is still the "motherhood and apple pie" statement for the industry. The goal of the IMTC is to make interoperability happen.

WR: What will success look like for the new organization?

AL: I don't think we will be able to measure success by any meaningful quantitative measure. But we do expect to see increasing outreach and level of interoperability as we expand our activities, an expansion made possible by economies of scale and extending into new technologies, such as WebRTC and UC Software Defined Networking (SDN).

MC: Ultimately of course, our success should drive an expansion of the market for all IP communications —voice, video, etc. I think we all understand that ease of deployment and ease of use, together with interoperability and reliability are the foundation of success. To the extent that the new IMTC can drive towards these goals will determine our success. To Anatoli's point however, this will be impossible to quantify.

WR: What can you tell us about the relationship between IMTC and IETF?

AL: It is much better than before. ☺ Over the past 3-4 years, IMTC have done a lot of work which is directly related to the IETF standards. IMTC's telepresence Activity Group created telepresence use cases which were taken into the IETF DISPATCH working group. IMTC SIPParity Activity Group created SIP Video Profile Best Common Practices, which is a public document and is used by all the SIP Video implementers today. Plus a number of people from IMTC leadership are also very involved with IETF. All in all, we have a good working relationship with IETF at this point, which I expect to continue.

WR: Who out there should be following the new IMTC.

MC: This is a technology consortium, so anyone interested in IP communications is a candidate for membership. I should mention that we do have a few end user organizations involved; people who want to make their input known directly and who want to follow the proceedings closely.

AL: As we expand our activities, we would like to see more input from both the service providers and the community that is forming around WebRTC, both of which are obviously important to the mission of the IMTC. We will also continue the important work in the area of UC SDN, as started by the UCI Forum, and will continue looking for the new areas where interoperability is important.

WR: Aren't service providers the domain of the OVCC? Are there merger talks going on here?

MC: No, but I'd love to have that conversation.

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Conferencing Service Provider Statistics (SpotCheck) – Q1 2014
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