

Cisco-Tandberg Deal Passes First Hurdle

Cisco's acquisition of Tandberg passed its first hurdle sometime on 3-December when approximately 90% of Tandberg's shareholders tendered their shares. So the acquisition is ON. Now it's up to the Norwegian and EU regulators to rule – not something we see as being more than a formality. Yes indeed, visual communications is coming to the enterprise forefront near you.

Sony Videoconferencing Says Goodbye to EMEA

With an incredibly naïve and backwards marketing move, Sony videoconferencing has announced the company is dropping out of the EMEA market effective April 1, 2010. While this is not an April fool's joke, the move was done in an amateurish way via a set of phone calls to resellers. Nothing in writing at first, and the distributors (and some of Sony's own employees) learned of the move not from Sony, but from the reseller rumor mill. Reportedly the videoconferencing products will be "supported" for seven years.

Here's What I Think. There probably aren't too many people surprised by this move; in fact it has been rumored for months. Sony pulled out of the North American market in 2007 – turning its business over to Spire Global. A similar move may be in the works for EMEA. But if you are a Sony videoconferencing customer, you have to be wondering 1) if they will pull out of Asia-Pac as well; 2) whether Sony can continue to develop products given their dwindling presence in the market; and 3) whether the big guys in Tokyo will actually focus on the company's core businesses and make the hard decisions every business needs to make in order to survive.

News in Brief

- Scalable Video Coding (SVC) gurus Vidyo have announced support for Microsoft Office Communicator, allowing MOC client users to participate in HD multiparty videoconferences. Vidyo's plug-in connects MOC with the VidyoDesktop client, enabling users to initiate Vidyo conferences using their MOC-based contacts. Instant Messaging sessions can be escalated to Vidyo conferences in the same manner that MOC video chat is launched. The Vidyo conference is initiated by clicking the "VidyoConferencing" button from a pull-down menu on a given contact. The contact is automatically invited to the user's meeting room, and a "guest hyper-link" is provided if the contact is not a registered Vidyo user. Vidyo has also simplified scheduling and guest participant invitations with a separate plug-in for Microsoft Outlook. Users can simply click the VidyoConferencing button on their Outlook tool bar to add a URL that takes invited guests directly into the user's virtual meeting room.

Here's What I Think. This is a significant development for Vidyo. One click integration of desktop videoconferencing solutions with Unified Communications platforms like OCS is likely to be the mainstream "modus operandi." The OCS connection creates another bridge over the "interoperability" barrier and adds momentum to the SVC adoption process.

- Polycom and BT have announced a worldwide three-year agreement designed to accelerate the growth of audio and video conferencing within the corporate and public sector industries. Under this global agreement, the companies will combine Polycom's voice, video and telepresence products with BT's managed services and global MPLS network.
- The American Telemedicine Association (ATA) announced the availability of formal practice guidelines for the use of videoconferencing for the delivery of mental health services. These guidelines are designed to form the standard of care for such services and will be the basis for the development and practice of uniform, effective, safe and sustainable telemental health practice
- ACT Conferencing is expanding its operations in Latin America. The conferencing provider now offers conferencing access numbers in Argentina, Chile, Colombia, Costa Rica, Dominican Republic, Ecuador, Mexico, Panama, Peru, Uruguay and Venezuela. ACT has also forged new partnerships in this region.
- ZTE Corp has completed what the company claims is the industry's first commercial IP Multimedia Subsystem (IMS)-based high definition (HD-1080p) videoconferencing system for China Mobile.
- Synchronized with the new look of the WR Bulletin, we've launched a new website with a new, cleaner, well organized design. You'll now find all our research studies and other content arranged by coverage area. Take a look! www.wainhouse.com
- Our random number generator has selected the winners from our recent survey on videoconferencing call preferences and practices. The grand prize of a flip video device went to russc@sas. \$100 Amazon gift certificate winners include tracyw@ford, mikes@go-genesis; mgunn@vtstrategies; jimmyc@alson, and danielh@mpsa.
- snom technology AG, a manufacturer of advanced voice over IP phones for enterprise and residential markets, has teamed with Wyde Voice LLC to deliver high-definition (HD) audio conferencing capabilities to snom's HD audio- enabled desktop VoIP phones.
- According to one unnamed source, SAP is planning to release a collaborative decision-making tool dubbed Constellation, which could be a potential rival to Google's Wave platform. Constellation will consist of a cloud-based tool accessible via a Web browser, as well as an on-premises component.

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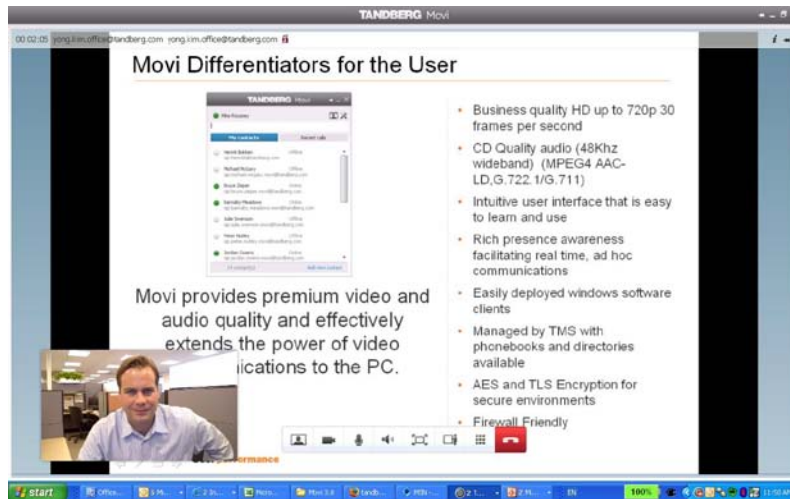
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Tandberg Launches Movi 3

Tandberg has released the third version of its desktop videoconferencing package, cleverly dubbed Movi 3. Movi 3 features three important changes or enhancements from the previous version. 1) The SIP application now supports data sharing, an essential element for desktop collaboration. Movi also adds H.263 support, making Movi, combined with Tandberg's TCS device, compatible with industry-standard room systems. 2) The user



Tandberg Movi 3 in content sharing mode

flexibility to integrators while maintaining the vaunted Tandberg user interface. The Custom Edition can be sold by all Tandberg partners, but only the qualified partners can do installations. Tandberg itself does project management for all these types of sales.

interface is all new. Movi 3 now features separate windows for application control and video. The result is an interface very familiar to UC aficionados. 3) The desktop application adds a PIP so users can see if their hair is in place (not Andrew's problem).

In an unrelated development Tandberg also announced the T3 Custom Edition. The T3 Custom Edition sells for about \$50K less than a full blown T3 and does not include the display screens, audio system, furniture, lighting, etc. The solution is intended to give total

New & Important from WR: Visual Communications Practice (VCP)

If you are a channel partner, service provider, vendor, enterprise/government end user, or a financial analyst following the visual communications market, we have important news for you. Wainhouse Research is launching a new program for 2010, the Visual Communications Practice, or VCP. With one subscription, you will gain 24x7 access to ALL the research notes, industry statistics, segment reports, videoconferencing forecasts, opinion pieces, and product/services matrices that we publish in the visual communications space. This new service is aimed especially at VARs, distributors, service providers and enterprise end users who prior to the launch of this program, could not justify the cost of our custom reports and market intelligence documents. Check out www.wainhouse.com/vcp. You can [download the subscription application \(pdf\) here](#) or [from this site](#).

As an example of our in-depth coverage of the products and services in the visual collaboration space, here is a list of the comparison matrices currently available to VCP subscribers, and the list grows continuously.

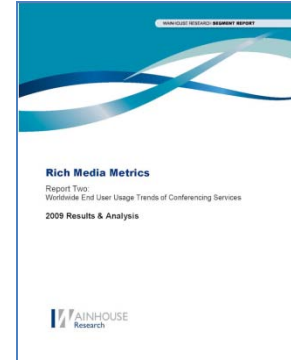
Visual Communications Comparison Matrices - Available via VCP subscription

Split System and Codec Only Videoconferencing Systems	Telepresence Solutions
Personal Videoconferencing Systems	Desktop Conferencing – ASP Solutions
Integrated Videoconferencing Systems	Streaming Solutions (Customer Premise)
Set-top Videoconferencing Systems	USB Speakerphones
Webcasting Service Offerings (Hosted / ASP / SaaS)	Video Bridges (MCUs)
Desktop Conferencing – CPE Solutions	Telepresence Multipoint Capabilities

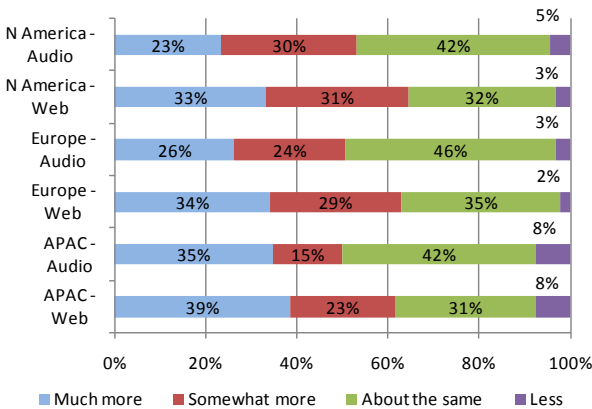
WR Releases Two New Studies on the Collaboration Services Industry

Wainhouse Research's CSP (Collaboration Service Providers) Practice Area has recently published Volume 3 of the Rich Media Metrics series covering that worldwide industry as well as its Emerging Market Study which provides detailed information about those regions still viewed as having untapped potential in the marketplace.

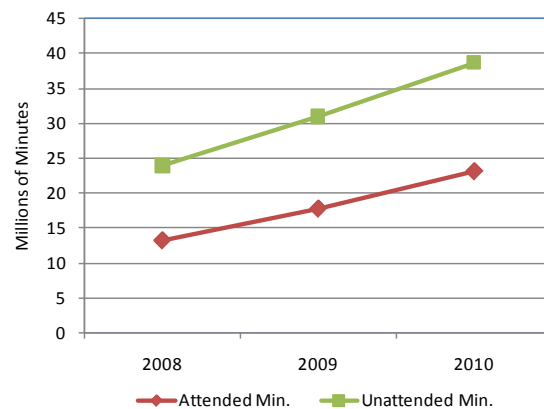
According to the findings in this year's [Collaboration Services End User Survey](#), there was a significant increase in usage across all regions as approximately 50% of respondents claimed greater use of audio and web conferencing over last year. Additional insight was provided as participants answered 13 different questions relating to their usage of Conferencing & Collaboration Services, including frequency of use and perceived quality of the services they received. [Survey details and ordering information.](#)



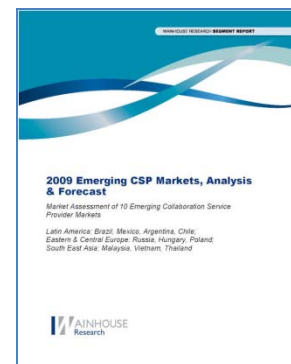
Usage Increase Over Past Year



Brazilian Audio Volume



The [Emerging CSP Markets study](#) covers the Latin American markets of Argentina, Brazil, Chile and Mexico, the Eastern & Central European Markets of Hungary, Poland and Russia and the Southeast Asian markets of Malaysia, Thailand and Vietnam. For each of these countries, WR has developed a market overview including market sizing & forecast, provider reviews and of the findings. Included among the findings in this year's report is the continued belief by WR analysts that there is still tremendous growth potential contained within these emerging markets. As evidenced by the consistent growth patterns seen year over year, it is believed that Russia and Brazil will be key areas on which CSPs should focus their resources. [Study details and ordering information.](#)

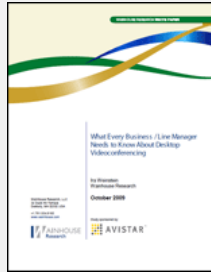


Additional details intended to provide insight and assistance to those planning sales and business opportunities in the CSP marketplace are found in each of these studies. For further information on these studies, please see www.wainhouse.com/csp or contact Senior Client Services Manager, Sara Fargo at sfargo@wainhouse.com or +1 781 934 6165.

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People & Places

ACT Conferencing, **Eric Olmsted**, Global Director of Sales

Agito Networks, **Donna Henderson**, VP Strategic Accounts

Event Calendar

Conferencing & Collaboration Events

When & Where	Who & What
March 23-25 2010, via the Internet	<i>Education for Everyone</i> Virtual Symposium
April 19, 2010, Berlin, Germany	Wainhouse Research CSP Summit - Europe
April 20-21, 2010, Berlin, Germany	Wainhouse Research Collaboration Summit
July 20-21, 2010, Boston, MA	Wainhouse Research Collaboration Summit
October 12, 2010, Boston, MA	Wainhouse Research CSP Summit - North America

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