



Citrix Brings HDFaces to the iPad

 Alan Greenberg, agreenberg@wainhouse.com

Timing it well, Citrix announced on “New iPad Day” 7th of March that it is now delivering video to the iPad, upgrading its GoToMeeting app with HDFaces. GoToMeeting for the iPad and iPhone (together) have had more than 500,000 Apple Apps Store downloads since the iPad app was first announced in 2010. The iPad app uses front or rear iPad camera, typical for all videoconferencing apps, but includes two methods of viewing video: what Citrix calls “active speaker video,” (aka voice-activated switching in other circles) whereby one sees only one video window of whomever is speaking in a PIP window over the data presentation, and continuous presence-style with up to six video windows. When in continuous presence mode, the content window and video windows can be resized in direct proportion using a tab located in the middle grey bar (pictured here): make the video content larger and content becomes smaller, and make the content larger and video windows get smaller. Meetings can be joined from the iPad with a three-field user interface option that requires meeting number, name and email address, or can be launched from a URL contained in an email or calendar that will recognize that it’s on the iPad and launch the app. Text chat capabilities are the same as before: meeting attendees can chat with all meeting attendees, organizers, or individual meeting attendees.

What Alan Thinks: Citrix isn’t the first vendor to bring video to the iPad, nor will it be the last. But there’s something very compelling about the execution here. Video quality is excellent even at 15 frames per second. The active speaker detection feature is new for the iPad app and not available in GoToMeeting for the desktop. It’s nice. The app joined an existing meeting quickly and easily. But what is most compelling is the ability to dynamically size content or video based on user



HDFaces with Content Emphasized



HDFaces with Video Emphasized

preference. Most vendors limit specific video capabilities either to keep video quality to an acceptable level and minimize bandwidth requirements or to simply

lock down a UI. Citrix has done this one right, and other vendors could take a lesson or two from the UI. (WR has just published a research note on mobility as handled by the entire collaboration vendor community in our WR On Demand education and e-Learning subscription service; my theory is that those who have focused on utility at the mobile device, such as web conferencing and streaming / lecture capture vendors, have taken a lead in creating the ideal user experience.)

Most compelling in GoToMeeting for the iPad is the ability to dynamically size content or video based on user preference.

As usual Citrix was not first to market with mobile video, but it certainly has cracked the code for making it useful. And though the iPad app is free, it's an automatic means of driving revenues because, put simply, the ability to reach more people means more usage for a service provider. The client itself is meaningless without someone having a subscription. But though the meeting host is paying for

the service, the iPad app adds to the viral nature of web conferencing. What's missing? I'd like to be able to launch and host an ad hoc or schedule a GoToMeeting session from my iPad app, which is a feature I hope

Citrix adds for account holders someday. You cannot schedule from the browser on your iPad because currently, scheduling or launching meetings is done from a resident client on one's PC or Mac. This also means that you cannot present content from your iPad; users are participants only and can only share video. When Citrix adds greater participant functionality, i.e., scheduling, launching, and sharing content, you'll truly be able to meet and collaborate with others from the beach, coffee shop, car, or back deck of your home with your iPad. Meanwhile, many of the videoconferencing and streaming / lecture capture vendors are delivering mobile apps. Mobility seems to be everywhere.



Citrix HDFaces

PGi Alliance with Deutsche Telekom Brings iMeet to Germany

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PGi and **Deutsche Telekom** announced on March 5th a strategic alliance that positions DT — Germany's leading telecommunications company — as the sole reseller of PGI's videoconferencing solution, iMeet, in the country. As part of this multi-million dollar agreement, Deutsche Telekom will host iMeet in its data centers in Germany, and it will soon make iMeet available to subscribers in the Business Marketplace in the Deutsche Telekom Cloud Center. DT plans to initially offer iMeet to Germany's small business community beginning summer 2012 and will expand to the German enterprise and consumer markets later this year. Launched in 2011, iMeet is PGI's next-generation, web-based videoconferencing service that enables up to 15 people to meet face-to-face online from their desktop, tablet or mobile device.

What Marc Thinks:

This alliance creates a tremendous opportunity for enabling substantial growth for personal web-based collaboration in the German market during 2012 and beyond. For the past five years, the German marketplace has been ripe for a cloud-based collaboration service that is simple, personal and mobile. And In contrast to some of its European neighbors, Germany has consistently lagged behind in the widespread adoption of new technology and collaboration services. By and large, the German business community has not accepted personal collaboration solutions due to lack of market awareness and poor user experience, particularly in the small and medium business market. In 2011, WR estimated the total addressable market for audio, web and video services in Germany was \$696.2 million — far higher than our actual achieved market of \$236.2 million.

For the past five years, Germany has rejected a host of web collaboration services that lacked accessibility and usability, and that provided an experience felt to be subpar. We think the new relationship between PGI and Deutsche Telekom may finally provide the answer.

While there is always a gap between opportunity and actual market penetration, the question has always been how to narrow this gap and, specifically in Germany's case, how to capitalize on the estimated \$460 million opportunity. For Germany, it will require greater awareness, a superior service offering and a strong incumbent that the local market trusts.

PGi's iMeet is the embodiment of everything the German business market values in technology: high quality, seamless execution and simplicity. And Deutsche Telekom, the incumbent and trusted communications leader in Germany, now has an industry-leading partner in PGI that shares its core values of offering well-executed, robust, intuitive and reliable collaboration solutions. Expect that DT is in the best position to drive market awareness of any service provider in Germany.

We're keeping our fingers crossed on this one for the German market. The combination of iMeet and DT offers a set of critical success factors that could lead to widespread adoption in the German market. Deutsche Telekom holds the trust of millions of German knowledge workers. This looks like a sure thing.

New White Paper on Collaboration in Education: Integrating LMS-Collaboration Platforms



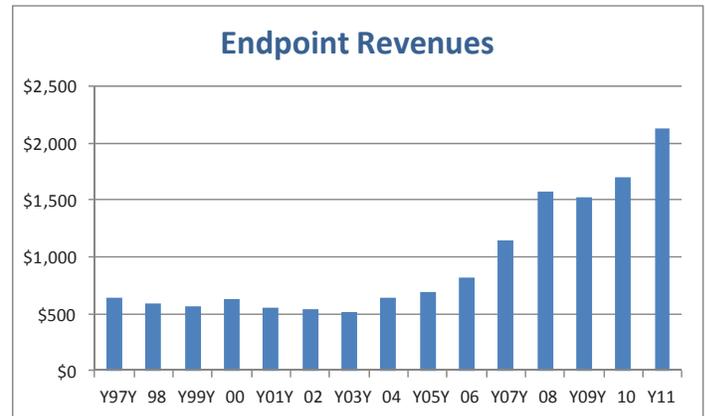
The approaches to integration vary by both real-time collaboration vendors and those who make asynchronous Learning Management Systems. Based on interviews with colleges and universities, this [free paper](#) — sponsored by Blackboard — explores benefits of integration, how deep and / or wide an integration

can be, and what to look for in implementing an integrated solution. WR analysts Andy Nilssen and Alan

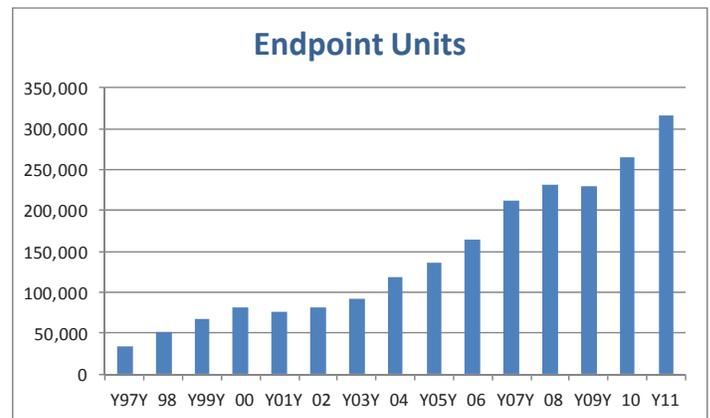
D. Greenberg will join a webinar panel that includes the University of Utah, the Mississippi Community College Board, and Holmes Community College to discuss the topic on Tuesday, March 27, 2012 at 2 PM Eastern Time. Those interested can pre-register at the [Blackboard Collaborate](#) home page.

2011 SpotCheck: Videoconferencing Report Now Available

Now available to WR On Demand group videoconferencing subscribers is our report on 2011 endpoint and infrastructure sales of group videoconferencing systems. The industry crossed the \$2 billion dollar mark for the first time ever. As you can tell, revenues are up, units are up, and the march towards conference room domination continues.



Annualized Group System Revenues 1997-2011



Annualized Group System Unit Sales 1997-2011

News in Brief

- Ready for your cocktail party trivia from the WR Bulletin? **Skype** achieved a milestone: 35 million concurrent users of its audio and videoconferencing services. This occurred just one week after the Microsoft-owned prosumer service hit the 34 million concurrent user milestone, and the numbers of new users Skype says it adds weekly is stunning.
- **Sonic Foundry** has announced a new **Mediasite ML HD Recorder** as well as mobile playback support for **Android**. With HD / SDI broadcast standard input, the ML HD can be used with both professional and consumer video equipment. The Recorder captures and encodes H.264 video up to 720p and 30 frames per second, simultaneously synchronizing it with high resolution images up to 2048 x 1536. When paired with the Mediasite 6 webcasting and video content management platform, ML HD-recorded content is instantly streamed to any computer or mobile device, including iPad, iPhone, iPod, Android and BlackBerry. The portable and ruggedized ML HD Recorder, scheduled to ship late March, joins the Mediasite RL HD Recorder already on the market. Sonic Foundry also announced mobile support for Android devices, and that it has achieved its 1,000th customer in one of its major vertical markets, higher education.
- **VBrick Systems** has announced that the company has been chosen to be a member of the Avaya DevConnect Select Product Program. Through this program, VBrick video streaming solutions will be sold through Avaya.
- Speaking of Avaya, the company has launched an outsourcing service called **Avaya Communications Outsourcing Solutions (COS)**. Though Avaya has been in the managed services business for a long time, COS is Avaya's first fully-outsourced offering that provides custom-built solutions and comprehensive management of a client's entire communications environment, including applications for unified communications, contact centers, data networking and video communications.
- **Siemens** has introduced the latest version of its **OpenScape UC Suite**, providing new scalability,

Skype's milestone occurred just one week after the Microsoft-owned service hit the 34 million concurrent user milestone.

mobility and federation capabilities and improving public and private cloud capabilities. The new OpenScape UC Suite can now provide a single UC user experience for Presence, messaging, contacts and directories in large multi-site, multi-vendor organizations. Siemens also reports that a study it commissioned determined that 80 percent of user endpoints are now outside of corporate headquarters. This is no surprise to us, but further affirms the trend toward distributed and mobile workforces. OpenScape UC Suite now offers new OpenScape Mobile clients for Apple iOS and Android. These new clients bring VoIP and UC functionality along with gesture-driven capabilities to smart phones and tablets.

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- Canada's **Mitel** has announced the latest version of its UC&C offering, the Mitel Applications Suite (MAS 4.0). Also available as a virtualized solution, MAS 4.0 offers new web-based collaboration and mobility solutions and a single application interface. Key highlights of features for end users include a download-free, web-based collaboration portal and secure IM and Presence on mobile devices (available now on Android and Blackberry clients, with availability on Apple iOS to follow). IT-centered features include simpler administration in areas like user provisioning of functionality, and extended virtualization, with support for VMware's vSphere 5.0. This enables MAS 4.0 to be deployed alongside other business applications in the data center, and vCenter management tools enable the Mitel solution to be managed like any other virtual application, with the latest VMware infrastructure. MAS 4.0 now offers support for up to 1,500 UC&C users.

WR & UC+C Analyst Appearances & Events

20 March 2012	WR Web Seminar on UC&C
4 April 2012 Moscow	WR's Richard Norris @ Trueconf Customer/Press Day
17-18 April 2012 Brussels	WR CSP Spring Summit 2012 , Marriott Hotel-Grand Place
17-18 July 2012 Philadelphia	WR Collaboration Summit
9 October, 2012 Boston	WR CSP Summit, Hotel Commonwealth



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- UK-based **SIPCOM** has unveiled its Global Service Network (GSN) 2.0, a commercial-grade, Microsoft Lync hosted communications and collaboration platform that enables fixed and mobile telecom operators, system integrators, resellers and CSP's to enhance their service offerings. Features include a multi-tenant, virtualized and dedicated platform that includes IM and Presence, enterprise voice, videoconferencing, an extension of the Microsoft Lync feature set to mobile devices, and federation with Windows Live, Yahoo, Google, Jabber, and Sametime. SIPCOM was selected by Microsoft to help create the Microsoft Lync Hosted Pack Reference Architecture. As part of the process SIPCOM designed, built and now operates four points of presence (PoPs) within data centers in the United Kingdom, France and North America. The project brought together technology vendors including **Juniper, Dell, Brocade, Acme Packet** (see below), **Level 3** and **Radvision**.

- **Acme Packet's Net-Net Session Director** Session Border Controller (SBC)



has been selected by Microsoft to support the Lync server. The SBC will enable service providers to introduce interoperable, Microsoft Lync-based, unified communications systems to their enterprise customers. The SBCs also will provide key session control and interworking functions to help hosted UC providers connect with third-party SIP trunk services. The Net-Net SBC from Acme Packet also is deployed in SIPCOM's GSN 2.0.

- Citing growth in audio and web conferencing services, Denver-based **ReadyTalk** says it is moving into a new headquarters building and expects to grow its workforce from 140 to nearly 200 by the end of 2012. Look for a jobs available sign up any day now.



AnyMeeting, a free web conferencing and webinar service, has announced a fast way for first-time users to get a meeting started with **AnyMeeting Now**. Individuals lacking an AnyMeeting account can start a meeting on demand by clicking a button on AnyMeeting's home page to instantly start a meeting. Users can then send out email invitations with the conference call information included, bring attendees in, and share a presentation. AnyMeeting also reports that it has reached over 120,000 registered users, growing almost 600 percent over the last 12 months.

- Continuing the freemium thread, **LogMeIn** has added phone (POTS) access that can be used in combination with VoIP to its virtual collaboration platform, **join.me**. The new POTS service is free for a limited time with both join.me and join.me pro, but eventually will only be included with the latter, which is the premium paid version of the online meeting service.
- **omNovia Technologies** has released its Web Conference Mobile app for Apple iOS and Android devices. The new app allows anyone with a mobile device to not only view live webinars on the go but also participate via chat, polling and other interactive tools.
- At Mobile World Congress (MWC) late February (after our last issue had gone to press), **BroadSoft** announced two user apps for enterprise mobile users 1) BroadTouch Business Communicator, with unified communications features incorporated for voice, video, business directories, call logs, instant messaging and presence. A single UI supports a user's mobile devices and platforms, including Windows, Mac, iOS and Android, and 2) BroadTouch MobileLink, a mobile client designed to help end users make and receive voice calls with their "business identity" over their existing cellular service. Imagine: bring-your-own-device might mean paying for your own work calls! Who would have thought the day would come! The app is designed to support service providers wishing to extend voice and service management capabilities to mobile devices.
- After reporting on Polycom's many MWC announcements, the calendar prevented us from mentioning that **Polycom** has partnered with **HTC** to deliver RealPresence Mobile on select HTC smartphones and tablets in mid-2012. Polycom also announced that it is partnering with **Vietnam Post** to offer a subscription-based, pay-as-you-go video collaboration service in Vietnam called MegaConference, which will be built on the RealPresence platform. Similar agreements were announced with **Tulip Telecom** in India and Romania's **Romtelecom**.

- **Huawei** announced at Cebit its next-gen, three-screen telepresence solution: Huawei Full-View Telepresence. The new system is capable of 1080p, 60fps HD video and the company touts its impressively small, 5.5 mm bezel between screens to improve the immersive experience. **Full-View** features a wireless Android-based touch panel, hidden camera, and a hi-fi three-channel audio system.

- **Citrix** was not alone in launching an app for the iPad. **LifeSize** made a similarly timed-to-sync-with-Cupertino announcement that its **ClearSea** (remember Mirial?) client / server desktop and mobile solution supports iOS 5.1 and is iPad ready. LifeSize also announced the second generation of LifeSize Phone, a touch screen conference phone that ships with the LifeSize Room 220 HD video conferencing system. LifeSize Phone includes touch-based navigation and directory dialing, as well as control of data sharing and cameras.



LifeSize phone

LifeSize announced that its ClearSea client / server desktop and mobile solution supports iOS 5.1 and is iPad ready

- **Video Guidance** has expanded its VG Connect cloud-based service for videoconferencing endpoints, now supporting Cisco, Polycom, and LifeSize endpoints.
- **Glowpoint** reported Q4 revenues of \$3.5 million for its cloud managed video services, an increase of 18% over the same period 2010, and network services revenue of \$3.2 million, down 17%. Total revenues for the year were \$12.8 million for cloud managed video services, \$13.4 million for network services revenue, and \$1.6 million for one-time / event-based revenue. Grand total: \$27.8 million. The company also reported that the number of telepresence and videoconferencing rooms under its management totaled 1,152 by the end of the year.
- **WHYGO**, a leading online distributor of public videoconferencing and Telepresence facilities, and **myVRM**, the scheduling software provider for private videoconferencing and Telepresence facilities, have formed a strategic partnership to help end users and channel partners schedule private and public video conferencing and Telepresence facilities via Microsoft Outlook and Lotus Notes scheduling platforms. Mutual clients using WHYGO's public room network and myVRM's scheduling platform will be able to schedule all their private and public rooms via a simple Outlook plug-in.
- Providing support for Cisco TelePresence, Polycom, and LifeSize, **ScienceLogic** has announced the addition of videoconferencing management capabilities to its IT operations and dynamic

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cloud management platform. ScienceLogic pre-integrates the core management functions that enterprises and service providers need to manage IT operations across data center and cloud computing infrastructures, including performance, fault, availability, asset, service desk, automation, and event management. The goal is for ScienceLogic to monitor an entire IT infrastructure of servers, networks, and storage — not just videoconferencing and telepresence systems — to provide a comprehensive view of service quality through a single web console. The ScienceLogic management solution is available immediately at no additional cost to existing customers who are using the latest generation of its product. ScienceLogic charges per “device,” with a license costing \$150 per device. The ScienceLogic platform is also available via subscription.

- On the venture capital front, **AMD Ventures** is investing in **Nuvixa**, a developer of gesture-enhanced video communications and presentation



solutions for business. Leveraging depth-sensing camera technologies, the Nuvixa

StagePresence immersive video presentation tool extracts a presenter from virtually any background environment, and embeds their live video persona within any compatible digital desktop or slide content. AMD is betting long-range on driving sales of its AMD accelerated processing units (APUs) through immersion technologies like Nuvixa’s, which reportedly will double frame rates.

- Internet2** has opened the nominations for the 2012 Richard Rose Award. The annual award recognizes outstanding individual efforts aimed at extending the benefits of advanced networking to the broadest education community. The award will be presented at the Internet2 Spring 2012 Member Meeting in April. Nominations will be accepted until March 26, 2012. Some of us at WR knew Richard Rose, a terrific fellow and a pioneer in networking and collaboration, who was executive director of the University of Maryland Academic Telecommunications System (UMATS) and the University System of Maryland (USM) Office of Information Technology. Internet2 also announced support for **Cisco TelePresence** rooms in its portfolio of supported endpoints.



Usage Trends Survey Winners Announced

Congratulations to the five prize winners, end users drawn randomly from a set that participated in the 2012 Worldwide End Usage Trends of Conferencing Services survey. Winners of the \$50 Amazon gift certificates are MaryEllen P, ESPN, Stefan S, Daimler, Jerome Z, Sennheiser, Oliver S, Swiss Re, and Jose B, Morgan Stanley.



Federation Circa 2269

Bill Haskins, BHaskins@wainhouse.com



Bill Haskins

Federation is one of those words easier to say than to describe. A quick Google or Bing search for the term uncovers a nice Wikipedia definition detailing Federal States, an advertisement for a clothier, and a wiki entry for the United Federation of Planets, including a quote by Captain James T. Kirk,

circa 2269: “A dream that became a reality and spread throughout the stars.” It is telling that Kirk’s entry happens to be our favorite.

In the world of Unified Communications, federation is a key, if not misunderstood term, and one that could use more focus from collaboration service providers. Here, Federation entails an established trust between platforms, allowing users on *disparate* platforms to interact with each other. Federation allows two organizations to leverage their UC investment to communicate with each other, allowing users from organization A to add users from B to its UC client, share presence, and send instant messages (or more). These connections may be between two organizations running the same UC platform, or, depending on the service in question, may be between UC platforms from different vendors. In each case, the process of federating is dependent on the UC platform vendor - how the trust is established, what information is needed, and with which systems the service will interact.

Herein lies the issue — the vendors in question have no incentive to enable seamless, full featured connectivity between their respective solutions and ‘the outside world’ — and who can blame them? Microsoft stands to sell the most licenses if the only way you can experience all features, cost savings, and maximum productivity gains is by interacting with their clients. Microsoft is not alone in this conversation — most enterprise UC vendors employ some form of proprietary signaling, proprietary codecs, variants of the SIP standard, or other firewalled approach that limits who, what and how external clients interact with their service. The end result is a limited user experience at best: unless you only interact with partners who are running the exact same vendor stack as your enterprise, you’ll only be able to send instant messages with your federated contact. No group chat, no audio, no video, and don’t even ask about conferencing. Worst case: you can’t connect at all.



Federation is, in a quote by Captain James T. Kirk, circa 2269: “A dream that became a reality and spread throughout the stars.” It is telling that Kirk’s entry happens to be our favorite.

This limitation placed on the user experience is creating a growing demand for an intermediary to solve the issue. The effect is similar to the B2B demand created when Telepresence solutions were first introduced: very quickly after the first few enterprises invested big bags of cash into their TP infrastructure, there was a commensurate push for B2B gateway services. We expect to see a similar push for Federation clearing houses that solve at least two key challenges: 1) make it easy to establish federated connections to other organizations, and 2) allow for full interop between solutions, enabling all features with external partners regardless of the platform they are running — including rich presence, multi-party chat, VoIP,

video, and conferencing services. Those organizations that are leading the UC deployment pack are pushing for these services now. To adapt a quote from one of the most progressive UC-enabled enterprises: “I don’t want my service provider to gain competencies in running my UC platform — I want them to solve problems that their cloud is better positioned to solve. Federation, B2B connectivity, and inter-vendor communications — those are services I’d like to see grow in the cloud.”

Enter NextPlane, a small, growing company out of Sunnyvale California. NextPlane has been working to solve this challenge over the last four years, and already has a well-established customer base as a result. The company provides hosted federation services that allow all variants of Microsoft, IBM Sametime, Cisco Jabber, WebEx Connect, Jive Openfire and Google Apps to communicate with each other. Today’s solution allows for trusted IM and Presence between all variants, and includes Microsoft to Google Audio. As you can imagine, NextPlane is working quickly to expand that feature set to include full audio and video between all vendors, while adding additional vendors to their solution.

We believe NextPlane is an early mover with the potential to be a shaker, in the right place at the right time. We see a real opportunity to evolve the federation service foundation the company has invested in, potentially growing into identity management, UC analytics, social integration, mobile extensibility, B2C connectivity, and more. NextPlane’s ambitions are large, and not without some risk — we are interested to see if they can maintain universal connectivity when the vendors in question make inevitable changes to their solutions. But, for now, it appears that the dream is fast becoming the reality, and we hope to see it spread throughout the stars. Captain Kirk would be proud.

(Editor note: Bill has produced a WR On-Demand research note on NextPlane that goes into greater detail for end users and vendors / service providers interested in the topic.)

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