

Collaboration at the Crossroads: Collaboration Technology Convergence



Collaboration Technologies: Part Three—Mini Report

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May 2011

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Part Three: Collaboration Solution Providers

In [Part One](#), we set the foundation for Collaboration Technology and described the three elements of a collaboration suite.

In [Part Two](#), we delved into defining the Purpose, Role and Functional views of collaboration solutions, so that you can understand who will use and apply the technology.

Here in Part Three, we return to the Solution Providers. Who are they? How are they positioned in the market? How can you create a true solution out of the components?

The Market Today

The collaboration market today is rapidly changing. Previously, there were standalone video hardware and services, companies providing web-meetings/webinars, and companies for business process collaboration activities. Today there have been many mergers. And many of these mergers have been driven by users who expect a full collaborative experience—visual, real-time and intelligent. In addition, they expect to reach out across many platforms and channels—across the miles, across the enterprise—in a seamless way.

However, very few companies provide all services in one suite. So, most users are still likely to purchase these modules separately, for now. In particular, the business collaboration apps providers have not gotten with the “full suite” concept. We would think it would be natural to provide an all-inclusive approach to such business processes as Design, Sales and Operations Planning, and business planning meetings.

Solution Provider Market—Top Down

Viewing the market offerings, there are both functional and architectural considerations for an enterprise purchasing these solutions. First, we will describe the major components for consideration, and then position solutions providers.

Although the market is chock-full of players, only a few really offer a rich collaboration suite.

Category	Comments
Collaboration Platform	Includes video and web meeting. For a decade or more, video was predominately delivered through dedicated lines to provide reliable performance. But the internet and small cameras have given us ubiquitous video and provided consumers with video capabilities. So this market segment has become quite diverse.
Video Conference/ Telepresence Room	The best provide a premier experience. The new term here is “studio” and you can have this at your facility or use a third-party studio.
Integrated High Performance Video	Beyond the hardware, the optimization software that is required to deliver the bit stream to create high definition.
Web Conferencing	Web meetings and webinars have slightly different paradigms. Meetings are private interactions between teams. Webinars are public forums.
Mobile App	The leading players provide their collaboration application on smart phones. Though experience here is limited, it does provide connectivity. Leaders will have Android as well as iPhone apps.
Interoperable—Supports multi-OS, hardware, and platforms	Provides the ability to connect and support a rich assortment of hardware and carriers. Even corporate environments have mixed hardware environments. Participants also will be in video meetings from PCs.
Interactive Whiteboards	The collaborative experience is about real-time interactivity. Few players have real-time. They have ability to share libraries and “track changes,” but the essence of collaboration is brainstorming.
Anytime, one-click meeting organization	With many tools, the ability to create a meeting quickly from your contact lists. For example, you may be on a conference call or IM and want to create an ad hoc meeting. In addition, ease of use is key. Older generations of solutions lack this.
Distributed Architecture (no upload required)	Sharing desktops as well as content.

Category	Comments
Enterprise Social Network	This is an emerging space. It's mirrored on the social network phenomenon, but applied to the enterprise it has the proper controls and security. It also includes audit and tracking and capabilities essential for providing a work team with continuous use and value.
IM/Chat, Message Boards	Instant messages, chat, posting content for your team to share and comment on.
Moderator/Security Controls	Full enterprise security, password protected. Has features like moderator roles, and authorized and secure content.
Contacts	In an enterprise network, these are team members that are part of the organization or extended team.
Collaboration Applications	These are software applications designed for collaboration and content development such as document/application sharing.
Application Sharing	Real time sharing of a live application.
Co-authoring	Ability of multiple users to create, edit and transform content.
Joint live editing	Rather than editing and tracking authored content, the team can work on content simultaneously, in real-time.
Track, audit, history of encounter and content	Maintains a digital record of encounters between team members.
Business Collaboration Solutions	Support business collaboration functions such as Design, Supply Chain, Elearning, Medical Care and Remote Diagnostics.
Platform Considerations	
Client	Fat, thin, or ultra-thin client approach.
Cloud Platform	Important considerations center on public or private clouds. Security as well as flexibility concerns are critical here.
	

Figure 1: Major Elements of the Collaboration Suite

There are many detailed functional aspects of the solutions within the categories above, as each of the categories has dozens of features. Our purpose here is to provide direction to your inquiry efforts. In Figure 2, we use these major categories to position the technology providers.

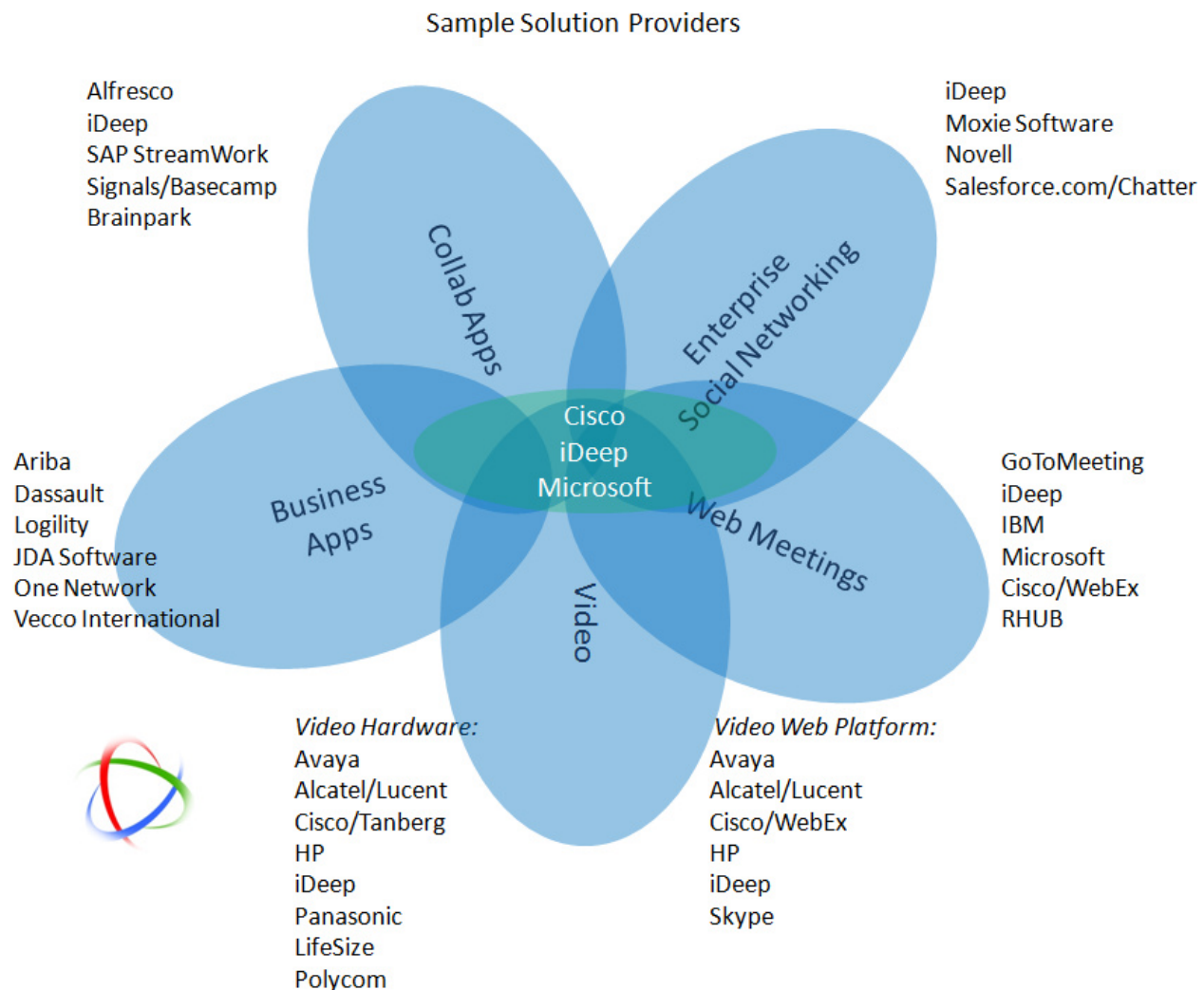


Figure 2: Collaboration providers

Here you see many players positioned in the categories. Many organizations have deeply embedded their webinar product in the day-to-day activities of their firms, with branded welcome scenes. We see this often in a strong sale-focused organization where on any given day a series of webinar and web meetings are scheduled. These firms are unlikely to pull the plug on these well-entrenched solutions.

However, when renewal time rolls around, they might want to have a discussion about services and/or pricing going forward.

Is Suite your Strong Suit?

In Figure 2, as we mentioned, the solution providers have been positioned in their major categories. There are only a few, though, that are aiming for the suite, providing most of the solution components so that a buyer can get a simple pricing scheme and most of the components packaged in one product.

Suite-like products work as such, with one “log on” to activate the various functions. They store previous preferences, libraries of content for the team to continue working on, and have a common user interface across the functions.

For example:

Cisco—With Cisco’s purchase of Jabber, one can be in a chat/IM dialogue and decide to open a WebEx web meeting for further discussion and document display.

iDeep—With TeleOffice there is one log in screen and interface for both web and video conference meetings. Past documents are there to continue working on, as well as meeting notes from the past session, so that the team can resume working where they left off.

Microsoft Lync—Obviously, integrated with various Office products, as well as parts-partner hardware.

The Integrators

Beyond solution providers, who are more or less one-stop shopping providers, there are the strong integrators. Here, in order to get full-suite experience, you need to purchase from two providers.

Examples are:

Alcatel/Lucent—Leveraging their router and Telco business, they have developed a software product.

Avaya—Has the platform, the device and HD experience upon which you can layer an app such as Sametime (IBM), LiveMeeting (Microsoft), or Skype. We are not sure, though, if these apps can take full advantage of the Avaya “flare experience.”

HP Visual Collaboration —HP has a stellar video studio experience. And the recently announced capabilities to enhance your PC video experience—both a new PC that is optimized for video, as well as a partnership with Vidyo—provide the software required to deliver the video to the hardware from a variety of application providers.

Hardware Leaders

Today, many users have video hardware or can purchase extremely cost effective configurations. Beyond embedded laptop video from all the major PC manufacturers, conference room or mobile video devices abound.

LifeSize—Owned by Logitech, they have truly easy to understand pricing and a rich assortment of equipment—from small form factor/small company, to high-end conference room.

Polycom—The leader in this space, Polycom partners with all, sells with or alone, almost any solution. They are the innovator in terms performance and range of equipment. Not content to sell just the equipment, they also have strong video HD software to compliment their own or other video conference encounters.

Sharp, Sony and Panasonic—These players also sell video/HD conferencing equipment and connectivity. Since you may be purchasing this equipment for other purposes such as retail display or security applications, the added value of these providers is that they integrate with most of the collaboration solutions.

Look for Interoperability

The key message for strong collaboration across geographies and organizations is interoperability. Most often, we are not in control of what kind of hardware team members have. This is true within a company as well as across trading partners. Even web-only solutions often require a software download for participants to interact. That is not true with all solutions, such as TeleOffice, that don't require user download for web meetings. All your preferences can be stored in the cloud, if the organization chooses this approach. This is quite different than WebEx, which requires software download—or a GoToMeeting approach, to which we give kudos for desktop sharing, an aid to collaboration. However, they don't have a sustained application for stored preferences and are not integrated with other apps yet. We shall see how the Skype/GoToMeeting partnership alters both solutions.

In Figure 3, we show providers that integrate their solutions regularly. They have all the accoutrements to make the hardware work with the software and often go to market together. However, for pure built-in interoperability, only a few are getting there. Microsoft Lync's recent entry into the market is just such a case. At launch, they made a point of showing interoperability, albeit with select partners. iDeep, as well, at launch, was integrated with Tandberg/Cisco, Sharp, Sony, Apple, and the "phone crowd"—iPhone and Android.

Part of the challenge for users in crossing between video-meetings and web/video-meetings is the approach—phone line vs. Voice Over Internet Protocol (VOIP). VOIP may have some performance challenges (new revs of software and hardware optimize this—at a price—you don't get that for free

with Skype). But optimized HD over phone often comes with limitations—only so many lines per call. You get HD, but only a few can play. Buyers should consider these issues when attempting to purchase their solutions.

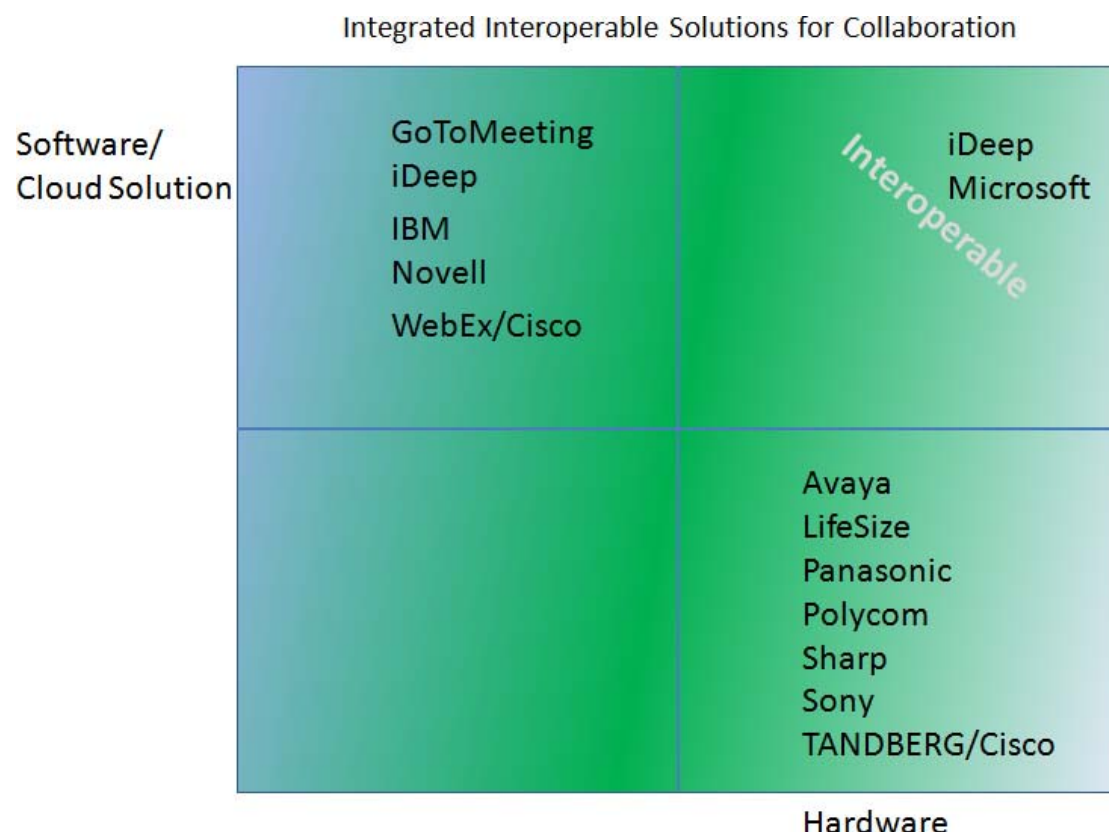


Figure 3: Interoperable Approach

We found only a few seamlessly provided video/phone-meetings and web/video-meetings as one experience. Some users can be in the studio enjoying HD, and other team members on the road or in remote offices can be on the web and have video connection.

Cloud Computing Issues

Behind the scenes these solutions are provided from the cloud. Why Cloud? Cloud provides user sign-on from any connection paradigm, from anywhere, though there are differences we will discuss below between service providers, access controls and security.

Cloud allows for pooled investments. In other words, instead of one user purchasing and managing all the elements—hardware, software, staffing, network gear (routers, PBX, etc.), these can all be shared, often significantly lowering the price. (You can read more about this at [Cloud Economics.](#))

If you need surge capacity, no problem. Say, once a quarter you host investors' meetings or an employee roundtable. This can take a corporation from managing ten web meetings a day with a few hundred users to ten thousand—one hundred thousand users at once. Even at the low end with a small business, you may go from two web meetings a week with four people to a marketing webinar with several hundred attendees. Obviously you want to be successful at scale. But you don't want to pay to accommodate the high-end capacity every day!

Several issues regarding cloud are important to consider in the decision-making process when purchasing collaboration solutions (or any SaaS solution these days).

Three versions of cloud:

Public Cloud—Public cloud is offered by third-party service or solution providers. This resource is shared by many customers. Public cloud providers go to great lengths to secure their tenants. GoToMeeting and various new web meeting and IMs are public clouds.

Private Cloud—Private Cloud is a unique instance for one corporation. It can be hosted on-premise. Hosting the cloud allows for the same web log on and the ability of the cloud providers to scale as users need. On-premise provides for the psychological benefits of physical security for the servers. For example, IBM Domino service or Microsoft Exchange Server provides such an approach.

So, how do users log in from remote locations? Users can log in through the Virtual Private Network (VPN) through special keys and passwords to access these servers. VPN can be software and/or hardware. VPN is a deep topic on its own, but for the collaboration discussion one interesting note in this market is RHUB, which provides an appliance for your web meetings. This type of solution, though usable for large and small business with fewer security concerns, can also, we believe, address the more security-minded enterprise. For more on VPN you can visit [Wikipedia](#).

Hybrid cloud—Here we have a mix of paradigms. For security concerns, enterprises may want their own storage and software instance. Particularly in collaboration solutions that use shareware for applications for content creation and co-authoring, tracking and auditing meetings, and ongoing management or preferences, users may feel more comfortable with their own server. Yet users want the ease of ubiquitous cloud, since they are conducting meetings cross-enterprise and around the globe. And lastly, they want the pooled, cost-saving benefits of multi-tenancy.

The hybrid provider seeks to address this complex needs. iDeep is an example of this type of provider.

Thin Client

One other aspect of selecting these solutions that we breezed over earlier was whether or not they require application software on the client, or can they be run as a thin client (browser only). Thin or very thin solutions that allow access through any standard browser are the most versatile. All the information

is stored on a server, and the individual users can all access it. Again, if we have remote access, from multiple channels—smart phone, PCs from different trading partners—then thin client makes sense.

There are various levels of thinness. Many collaboration applications, though accessible from the web, require software downloads, and these can be substantial. Skype, WebEx and Adobe are examples.

This represents a challenge for broad-based participation, since the first time log on can be a long and intimidating process for novice users. And post web meeting, you may have to store substantial sized software on your computer—a space allocation that older computers may not provide.

So very thin is in, for the most versatile of collaboration experiences.

Collaboration Convergence

The last few years have seen a convergence of platforms and products providing a rich choice of methods and access. All these support an inter-enterprise, access-anywhere requirement that most businesses have today.

Some solution providers are placing large investments in assuring this integrative approach. So if you are using IM on your cell phone and want to switch to video or web meeting, you will be able to do this. Or you may need to include partners and participants who have hardware and software that is old, remote, or not part of your own corporate portfolio.

Are We There Yet?

There is a deeper convergence users yet require. What is the purpose of meeting and collaboration? It is to support the business process whether in education, diagnostics, supply chain, design, legal interactions, community awareness, or dialogues of all sorts.

So where are the applications vendors in all this? The users are absolutely using their web or video meeting tools to have these business discussions. Yet most often, they have to buy multiple products to achieve that experience. Examples of solution providers in hot pursuit of full suite experience are Salesforce.com and Dassault. We need to see more. Admiration is not enough. And quite frankly, partnering with Salesforce or Apple—get in line! You need to focus on your value-add to the customer as directly as you can.

I hope that our technology provider readers will take the hint, here. Seamless *one click* communications which are understood and used by the Generation Y'ers should be part of the application today.

Appendix References and Resources

[Collaboration Technology: Part One](#)

[Collaboration Technology: Part Two](#)

[Collaboration](#) – ChainLink collection on Collaboration

[Global Work Space](#) – LinkedIn group on Collaboration

[Cloud Resources](#) – ChainLink collection on Cloud computing



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