

For: CIOs

The Forrester Wave™: Desktop Videoconferencing, Q3 2013

by Philipp Karcher, September 13, 2013 | Updated: September 26, 2013

KEY TAKEAWAYS

Desktop Videoconferencing Is Changing The Game

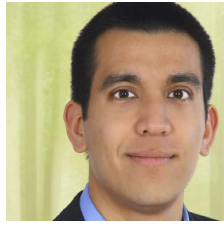
Technology improvements are lowering the infrastructure and price barriers to using videoconferencing, making it available to more people and generating new applications. Videoconferencing suppliers are scrambling to reposition themselves to take advantage of these new opportunities.

CIOs Should Plan To Support Videoconferencing On Multiple Devices

Room-based videoconferencing continues to be important as people meeting in conference rooms demand the high-quality video and turnkey operation that dedicated systems provide. Therefore, strategies should emphasize interoperability and ease of use that allow participants on PCs and mobile devices to join meetings taking place in conference rooms.

Unified Communications And Collaboration Strategy Separates The Leaders

Leading products have comprehensive functionality and come from a vendor with a compelling vision for unified communications and collaboration. Some products have limited functionality but fit into an ecosystem that represents a complete solution. A few score well on the basis of being excellent standalone desktop videoconferencing solutions.



The Forrester Wave™: Desktop Videoconferencing, Q3 2013

Microsoft Leads, Followed By Avaya, Cisco Systems, And Vidyo

by [Philipp Karcher](#)

with [Peter Burris](#) and Kelsey Murphy

WHY READ THIS REPORT

There are four major categories of desktop videoconferencing solutions: consumer applications, unified communications (UC) clients, video pure plays, and webconferencing. In Forrester's 60-criteria evaluation, we identified the 10 most significant software providers in three of those categories — Avaya, Blue Jeans Network, Cisco Systems, IBM, IOCOM, LifeSize, Microsoft, PGI, Polycom, and Vidyo — and researched, analyzed, and scored their products. Another report, the Forrester Wave on webconferencing, evaluates solutions whose feature set prioritizes sharing content and offers videoconferencing as a secondary feature. This report details our findings about how well the evaluated products fulfill our criteria and where they stand in relation to each other to help the collaboration leadership team select the right solution for the company's environment.

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Forrester conducted product evaluations in April 2013 and interviewed more than 40 vendor and user companies.

Related Research Documents

[The Forrester Wave™: Webconferencing, Q3 2013](#)

September 13, 2013

[The Forrester Wave™: Room-Based Videoconferencing, Q3 2012](#)

August 21, 2012

DESKTOP VIDEOCONFERENCING IS CHANGING THE GAME

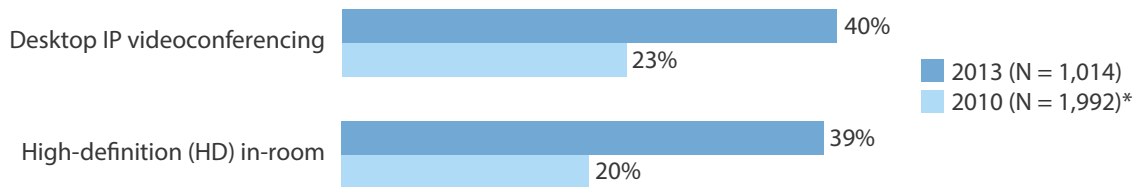
Technology improvements are lowering the infrastructure and price barriers to using videoconferencing, making it available to more people and generating new applications. After a boom period sparked by interest in high-definition quality and epitomized by investments in multiscreen telepresence studios, videoconferencing innovation today is happening on smaller screens like PCs, smartphones, and tablets that workers use in their everyday jobs. These innovations:

- **Lower the infrastructure barriers to videoconferencing.** Traditional room-based videoconferencing has remained on an island of specialized hardware due to its reliance on transcoding DSPs (digital signal processors), an incredibly compute-intensive type of work. Desktop videoconferencing running on standard servers — optionally virtualized on-premises or delivered from the cloud — is less complex for IT to deploy and manage, starts at a lower price point, and is more scalable.
- **Make videoconferencing available to all of your employees everywhere.** Workers want desktop videoconferencing because they don't have to get up and go somewhere, reserve a room, ask for permission, deal with chargebacks, or ask for help to use it. Videoconferencing is no longer just for managers and executives in conference rooms but for all workers connecting from their desks, from home, or on the road. Desktop videoconferencing is a more frequently used technology and is also more popular with newer generations of workers (see Figure 1). In the next three years, more than half of information workers will use desktop videoconferencing.
- **Make it available to everyone else, enabling new use cases.** Historically videoconferencing was for internal collaboration to replace travel between offices. Today, customers or partners can easily join videoconferences in the cloud via browsers or apps on tablets. As videoconferencing becomes more accessible, its business case changes. Forrester sees a tremendous level of interest from banks and government agencies in using desktop videoconferencing to talk to customers, from manufacturers looking to collaborate with partners in Latin America and Asia, and from utility companies looking at video on mobile devices to collaborate with field workers.

Figure 1 Desktop Videoconferencing Adoption Is Growing

1-1 Adoption has improved in the past three years

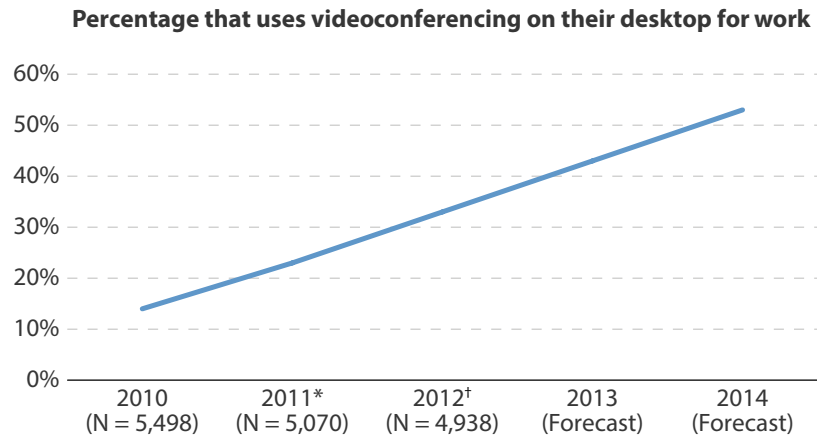
“What are your firm’s plans to adopt the following video technologies?”
(Respondents who selected implemented, not expanding or expanding/upgrading implementation)



Base: North American and European network and telecommunications decision-makers

Source: Forrsights Networks And Telecommunications Survey, Q1 2013
*Source: Enterprise And SMB Networks And Telecommunications Survey, North America and Europe, Q1 2010

1-2 Desktop videoconferencing is increasingly being used by employees . . .

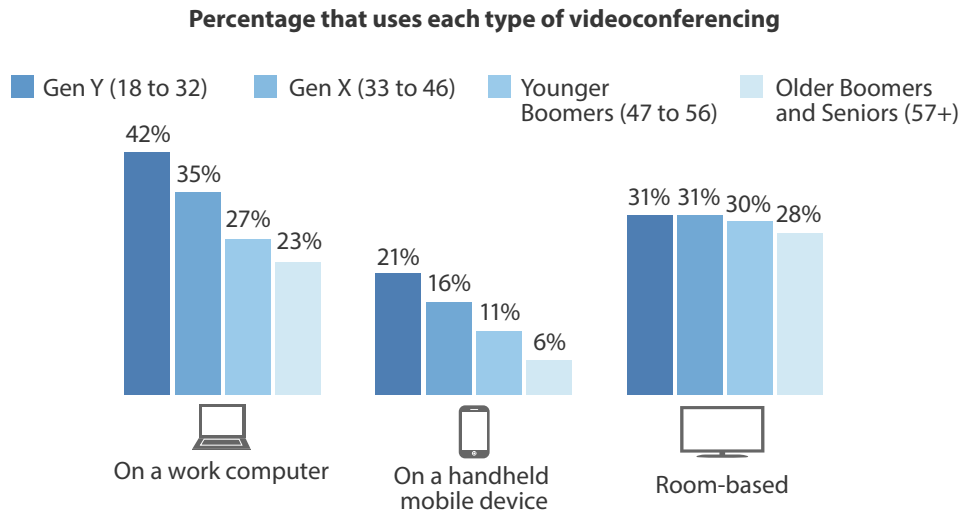


Base: North American and European technology information workers who use a PC for work
(respondents from 2011 and 2012 surveys also reported access to videoconferencing for work)

Source: Forrsights Workforce Employee Survey, Q3 2010
*Source: Forrsights Workforce Employee Survey, Q4 2011
†Source: Forrsights Workforce Employee Survey, Q4 2012

Figure 1 Desktop Videoconferencing Adoption Is Growing (Cont.)

1-3 ... and it has momentum with newer generations of workers



Base: 4,938 North American and European technology information workers who have access to these videoconferencing technologies for work

Source: Forrsights Workforce Employee Survey, Q4 2012

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Source: Forrester Research, Inc.

Plan To Support Videoconferencing On Multiple Devices

Desktop and mobile videoconferencing are getting a lot of attention these days. Organizations have a reduced appetite for systems that require room remediation and want solutions that are quick to deploy. That's not to say that room-based videoconferencing using purpose-built devices is no longer important. As long as people continue to meet in conference rooms, they will still demand the high-quality video and turnkey operation that room-based videoconferencing systems provide. Forrester is seeing:

- **Interoperability with room-based systems as table stakes.** Interoperability is an important consideration for most buyers who want to be able to connect to their existing equipment and to the majority of videoconferencing endpoints in the world. Enterprise videoconferencing vendors must have a solution for connecting to standards-based conference room systems. Some go beyond by supporting interoperability with Microsoft Lync. Blue Jeans Network offers the most comprehensive solution for interoperability by going even further to support connectivity with consumer clients like Skype and Google Video Chat.

- **PCs in conference rooms and the emergence of sub-\$1,000 endpoints.** The videoconferencing experiences on \$600 to \$1,000 mobile devices and PCs compared with what you get on \$15,000 purpose-built systems represent two extremes. When 90% or more of conference rooms are not equipped for videoconferencing, there is clearly a gap in the market. The growing trend for offices to include more ad hoc collaboration space — sometimes referred to as “huddle rooms” — particularly calls for some sort of in-between solution. A number of organizations we’ve spoken to are trying to fill this gap by cobbling together Mac minis or quad-core PCs with Logitech or high-end Vaddio cameras running desktop videoconferencing software. A new class of lower-cost, cloud-connected, plug-and-play devices provided by startups like Tely Labs and Biscotti is emerging to fill this gap with a purpose-built device.
- **Mobile videoconferencing becoming a key requirement.** Forrester’s data shows that 15% of North American and European information workers have used videoconferencing on mobile devices for work-related calls. Mobile apps are important not only for remote video collaboration but also for participants who want an easy way to connect to the meeting with just audio if that’s all they can manage in that moment. And increasingly, mobile apps are important for participants to view, share, and annotate content — potentially using a tablet at the same time they are connected from a PC or room-based system. In all scenarios, workers are coming to expect mobile apps on iOS and Android platforms to provide a seamless videoconferencing experience.
- **Browser-based videoconferencing solutions coming to market.** WebRTC (real-time communications) is a much talked-about API definition being drafted by the W3C to enable browser-to-browser applications for voice and video calling without the need for plug-ins. Optimistically, it will become a standard across major browsers within two years, solving cross-platform compatibility, simplifying joining meetings, and allowing for more interesting integrations. WebRTC is still on the horizon, but some vendors like Blue Jeans Network are using early drafts of the technology in their products, which still require you to install a plug-in. Buyers don’t yet need to be concerned with picking a vendor based on its support for this technology. Most vendors are waiting for the standard to be further along before throwing their hat in the ring.
- **More options for high-quality, low-bandwidth video.** One of the reasons desktop video adoption is taking off is that the video quality is improving thanks in part to faster processors in PCs that can handle the codecs used to compress video delivered over the Internet. Several vendors in this evaluation like Vidyo — which could comfortably support 1080p in our demo — use the H.264 SVC codec to deliver high-quality, low-bandwidth video, which optimizes dynamically for different devices and network conditions. H.265 — an even more compute-intensive, higher-compression codec — will start making its way into the market within a year. Today, buyers can choose between server-based, multipoint control unit (MCU), or routing architectures as viable approaches for high-quality desktop videoconferencing.

There Are Four Major Categories Of Desktop Videoconferencing Solutions

As videoconferencing vendors respond to these trends, they are positioning their products into four major market categories, ranging from products focused on videoconferencing to those that count videoconferencing among their features (see Figure 2):

- **Consumer applications are the most familiar to employees.** Skype, FaceTime, and other applications often make their way into the workplace when employees bring their own solutions. These tools have fewer integrations and management controls than other categories of solutions. Many companies have policies governing Skype use, whose enterprise credibility has been boosted by Microsoft's acquisition. Some organizations have formally adopted Skype as a companywide instant messaging and audio and video calling solution.
- **UC/unified clients are connected to the rest of the collaboration toolkit.** All-in-one products for real-time collaboration like Cisco Jabber, IBM Sametime, and Microsoft Lync are often used for videoconferencing because many organizations already have them broadly deployed for instant messaging and presence. Not everyone uses them for videoconferencing, but the option to do so is just one click away. Since they are tied into the companywide directory, these solutions are good for facilitating ad hoc calls.
- **Video pure plays have a narrower focus but do what they do well.** Dedicated videoconferencing products have less functionality than UC clients or webconferencing tools but tend to have good interoperability with room-based systems, including support for things other solutions typically don't have like far-end camera control. The products in this category can be subdivided based on their back-end infrastructure. Avaya, LifeSize, and Polycom's products use ports in the bridging infrastructure that also powers those vendors' room-based systems. IOCOM's Visimeet is a server-based product. Vidyo's infrastructure routes video streams directly to the endpoints. And Blue Jeans Network is purely a cloud-based service.
- **Webconferencing is for meetings where content is king and video is secondary.** In general, videoconferencing is a secondary feature for webconferencing products. Forrester finds that companies tend to choose a desktop videoconferencing solution separate from a webconferencing solution, although this could change: Many webconferencing products — Cisco WebEx, Citrix GoToMeeting, and FuzeMeeting in particular — have improved their videoconferencing quality significantly in the past three years. Forrester recently published an updated Forrester Wave evaluation of webconferencing products.¹ One product in this evaluation, PGI iMeet, blurs the lines as a hybrid webconferencing/desktop video solution.

Figure 2 Differences Between The Categories Of Solutions

| | Consumer | UC clients | Point solutions | Webconferencing |
|------------------------------------|----------|------------|-----------------|-----------------|
| Videoconferencing features | Medium | High | High | Medium |
| Videoconferencing interoperability | Low | High | High | Low |
| Videoconferencing quality | Medium | High | High | Medium |
| Content-sharing quality | Low | Medium | Medium | High |
| Scheduling features | Low | Medium | Medium | High |
| In-meeting features | Low | Medium | Medium | High |
| Management features | Low | Medium | Medium | Medium |
| UC integration | Low | High | Low | Medium |

Consumer: Microsoft Skype

UC clients: Microsoft Lync, Cisco Jabber, IBM Sametime

Point solutions: Avaya, Blue Jeans Network*, IOCOM, LifeSize, Polycom, RealPresence
CloudAXIS Suite, Polycom RealPresence Desktop, Vidyo

Webconferencing: Adobe, AT&T, Cisco WebEx, Citrix Systems, FuzeBox, IBM Sametime, IBM SmartCloud Meetings, InterCall, Microsoft Lync, PGI GlobalMeet, PGI iMeet†, Saba Software

*Since Blue Jeans Network has strong interoperability and its own client has less functionality than UC or webconferencing clients, we put it in the point solutions category.

†Since iMeet has a lot of webconferencing features, we put it in the webconferencing category for this chart.

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Source: Forrester Research, Inc.

DESKTOP VIDEOCONFERENCING EVALUATION OVERVIEW

To assess the state of the desktop videoconferencing market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of top desktop videoconferencing vendors.

After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria. We evaluated vendors against 60 criteria, which we grouped into three high-level buckets:

- Current offering.** To assess the strength of the product offerings, we evaluated the vendors along seven groups of criteria: 1) platform support; 2) videoconferencing features; 3) user experience; 4) ad hoc meeting features; 5) scheduled meeting features; 6) in-meeting features; and 7) management.

- **Strategy.** We reviewed each vendor's strategy in several areas: 1) on-premises deployment options; 2) vendor cloud deployment options; 3) third-party hosting options; 4) videoconferencing interoperability; 5) unified communications (UC) integration; 6) business application integration; 7) conferencing portfolio; and 8) collaboration portfolio. We asked about, but did not score, pricing as a part of strategy.
- **Market presence.** To determine a vendor's market presence we counted each vendor's number of paid users, corporate customers, employees on the product, years of experience in the videoconferencing market, overall company revenue, and technology partners licensing or reselling the solution.

Vendor Scale And A Product Focused On Videoconferencing Narrow The Field

Forrester included 10 vendors in the assessment: Avaya, Blue Jeans Network, Cisco Systems, IBM, IOCOM, LifeSize, Microsoft, PGI, Polycom, and Vidyo. Each of these vendors has (see Figure 3):

- **A desktop videoconferencing product.** The Forrester Wave does not include webconferencing, a category of products whose feature set and layouts prioritize sharing content rather than interpersonal communication. It does include PGI iMeet, which is a hybrid web/desktop videoconferencing product. The Forrester Wave does not include room-based videoconferencing vendors that don't have software solutions for PCs and mobile devices.
- **Significant presence in the enterprise video market.** We evaluated the products with the strongest market adoption — including Microsoft Skype even though it is primarily geared toward consumers. We also included less adopted products like LifeSize UVC ClearSea because LifeSize is a leader in the room-based videoconferencing market and is in consideration by buyers looking at their overall videoconferencing strategy from the conference room to the desktop.

Figure 3 Evaluated Vendors: Product Information And Selection Criteria

| Vendor | Product evaluated | Product version evaluated | Version release date |
|--------------------|--|---|--------------------------------|
| Avaya | Scopia Desktop | 7.7.3 | March 2013 |
| Blue Jeans Network | Blue Jeans Video Collaboration Service | Not versioned | June 2013 |
| Cisco Systems | Jabber | 9.2 | April 2013 |
| IBM | Sametime | V8.5.2 | November 2011 |
| IOCOM | Visimeet | 13.5.22.1 | May 2013 |
| LifeSize | UVC ClearSea | 4 | May 2013 |
| Microsoft | Lync | Lync Server 2013 Lync Online | December 2012 February 2013 |
| Microsoft | Skype | 1.8.0.111 for the Windows 8 app 6.6.0.106 for the Win32/DT app | August 2013 |
| PGi | iMeet | 3.0.3 | August 2013 |
| Polycom | RealPresence CloudAXIS Suite | 1.3 | August 2013 |
| | RealPresence Mobile | 3 | July 2013 |
| Polycom | RealPresence Desktop | 3 | July 2013 |
| | RealPresence Mobile | 3 | July 2013 |
| Vidyo | VidyoDesktop | 2.2.2 | May 2013 |

Vendor selection criteria

A desktop videoconferencing product.

Significant presence in the enterprise videoconferencing market.

Source: Forrester Research, Inc.

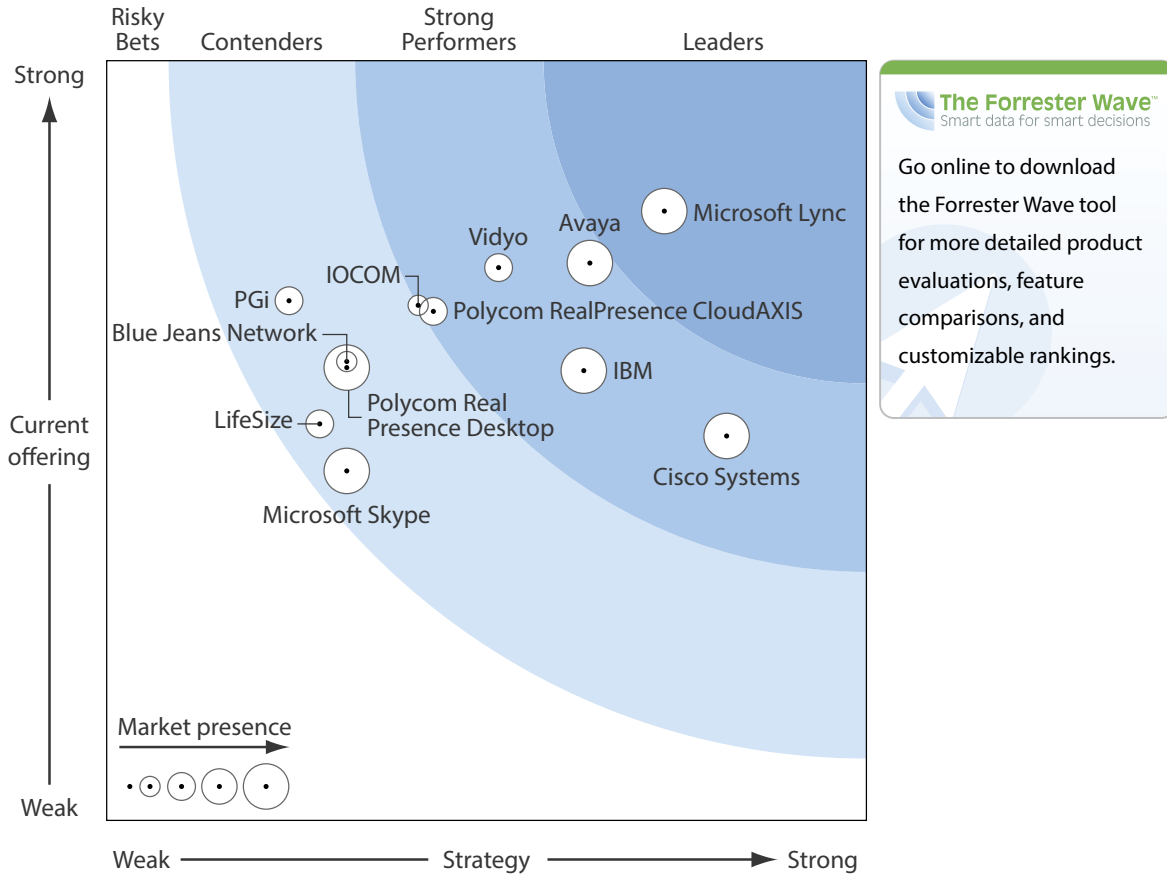
UC AND COLLABORATION STRATEGY SEPARATES THE LEADERS

The evaluation uncovered a market in which (see Figure 4):

- **Microsoft Lync leads; Avaya, Cisco, and Vidyó head up the Strong Performers.** Lync has the most comprehensive functionality in a single product among competitors in the Forrester Wave since it is also a full-blown webconferencing tool. Strategically Lync is a strong fit for many firms that use the Microsoft stack for collaboration and office productivity. Avaya's Scopia Desktop is lesser known but is a strong choice for video quality and interoperability, particularly for customers leveraging Avaya for UC or Radvision for room-based infrastructure and endpoints. Cisco Jabber is a strategic fit for customers leveraging Cisco's stack for telephony, video, and webconferencing. Vidyó's products deliver the best overall video quality and performance.
- **IBM, Polycom RealPresence CloudAXIS Suite, and IOCOM offer competitive options.** These products are an excellent fit for most scenarios. IBM Sametime supports interoperability with standards-based systems and is a logical fit for customers using its products for messaging and social business. Polycom RealPresence CloudAXIS leverages the strength of Polycom's infrastructure in interoperability, integration, and security to extend video collaboration outside the company. IOCOM Visimeet is the most flexible and configurable solution and delivers high-performance video in many scenarios that other products would struggle to match.
- **PGi, Blue Jeans Network, Polycom RealPresence Desktop, Microsoft Skype, and LifeSize have their strengths.** PGi iMeet is hybrid web/desktop videoconferencing tool and a good choice for buyers prioritizing high-fidelity content sharing. Blue Jeans Network is primarily a replacement for infrastructure on-premises and has the best support for any-to-any interoperability. Polycom RealPresence Desktop and LifeSize UVC ClearSea are good options for customers of those vendors' room-based endpoints and infrastructure, respectively, to bring remote participants into meetings. Skype is for small and medium-sized businesses (SMBs) and for individuals but through integrations with enterprise-class solutions like Lync and Blue Jeans Network can vastly extend your network of videoconferencing contacts.

This evaluation of the desktop videoconferencing market is intended to be a starting point only. We encourage clients to view detailed product evaluations and adapt criteria weightings to fit their individual needs through the Forrester Wave Excel-based vendor comparison tool.

Figure 4 Forrester Wave™: Desktop Videoconferencing, Q3 '13



The Forrester Wave™
 Smart data for smart decisions

Go online to download the Forrester Wave tool for more detailed product evaluations, feature comparisons, and customizable rankings.

Source: Forrester Research, Inc.

Figure 4 Forrester Wave™: Desktop Videoconferencing, Q3 '13 (Cont.)

| | Forrester's Weighting | Avaya | Blue Jeans Network | Cisco Systems | IBM | IOCOM | LifeSize | Microsoft Lync | Microsoft Skype | PGI | Polycom RealPresence CloudAXIS | Polycom RealPresence Desktop | Vidyo |
|---|-----------------------|-------|--------------------|---------------|------|-------|----------|----------------|-----------------|------|--------------------------------|------------------------------|-------|
| CURRENT OFFERING | 50% | 3.66 | 3.02 | 2.53 | 2.96 | 3.39 | 2.61 | 4.01 | 2.30 | 3.42 | 3.35 | 2.98 | 3.64 |
| Platform support | 20% | 3.05 | 2.30 | 2.20 | 1.65 | 2.85 | 2.00 | 4.10 | 2.75 | 3.65 | 2.80 | 2.20 | 3.10 |
| Videoconferencing features | 20% | 4.25 | 2.09 | 4.65 | 2.24 | 3.39 | 4.60 | 4.50 | 2.90 | 3.35 | 4.25 | 4.25 | 4.19 |
| User experience | 25% | 4.05 | 4.70 | 3.00 | 3.50 | 3.70 | 2.55 | 4.20 | 2.75 | 3.10 | 3.90 | 3.25 | 4.55 |
| Ad hoc meeting features | 5% | 4.00 | 3.75 | 2.25 | 4.00 | 3.00 | 3.75 | 3.50 | 2.38 | 3.88 | 3.75 | 3.38 | 2.75 |
| Scheduled meeting features | 5% | 3.75 | 4.25 | 0.00 | 3.50 | 2.25 | 1.50 | 4.25 | 0.00 | 3.00 | 3.00 | 2.25 | 3.00 |
| In-meeting features | 15% | 2.75 | 1.85 | 0.65 | 3.90 | 4.30 | 1.00 | 3.05 | 1.60 | 3.95 | 2.15 | 2.10 | 2.50 |
| Management | 10% | 3.85 | 2.85 | 2.00 | 3.50 | 3.05 | 2.40 | 3.90 | 1.25 | 3.10 | 3.00 | 2.80 | 3.80 |
| STRATEGY | 50% | 3.18 | 1.58 | 4.08 | 3.14 | 2.05 | 1.40 | 3.67 | 1.58 | 1.20 | 2.15 | 1.58 | 2.58 |
| On-premises deployment options | 10% | 4.30 | 0.00 | 4.40 | 4.40 | 5.00 | 3.50 | 5.00 | 0.00 | 0.30 | 5.00 | 3.25 | 5.00 |
| Vendor cloud deployment options | 10% | 0.00 | 3.25 | 2.90 | 0.00 | 4.00 | 0.00 | 4.70 | 0.75 | 3.45 | 0.00 | 0.00 | 1.80 |
| Third-party hosting options | 10% | 5.00 | 0.00 | 5.00 | 1.00 | 1.00 | 0.00 | 3.00 | 0.00 | 1.00 | 0.00 | 5.00 | 5.00 |
| Videoconferencing interoperability | 15% | 4.00 | 5.00 | 4.00 | 3.00 | 3.00 | 4.00 | 3.00 | 1.00 | 0.00 | 4.00 | 4.00 | 3.00 |
| Unified communications (UC) integration | 15% | 4.00 | 2.00 | 5.00 | 3.00 | 0.00 | 0.00 | 3.00 | 0.00 | 0.00 | 4.00 | 0.00 | 2.00 |
| Business application integration | 10% | 3.00 | 2.00 | 3.00 | 5.00 | 3.00 | 3.00 | 3.00 | 3.00 | 2.00 | 3.00 | 0.00 | 5.00 |
| Conferencing portfolio | 15% | 4.00 | 0.00 | 5.00 | 3.00 | 1.00 | 1.00 | 3.00 | 2.00 | 3.50 | 1.00 | 1.00 | 1.00 |
| Collaboration portfolio | 15% | 1.00 | 0.00 | 3.00 | 5.00 | 1.00 | 0.00 | 5.00 | 5.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Pricing | 0% | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| MARKET PRESENCE | 0% | 4.08 | 2.20 | 4.45 | 4.90 | 1.65 | 2.45 | 4.90 | 4.25 | 2.90 | 2.30 | 4.10 | 2.95 |
| Paid users | 30% | 3.00 | 2.00 | 4.00 | 5.00 | 2.00 | 3.00 | 5.00 | 5.00 | 1.00 | 1.00 | 3.00 | 3.00 |
| Corporate customers | 30% | 5.00 | 3.00 | 5.00 | 5.00 | 1.00 | 1.00 | 5.00 | 5.00 | 5.00 | 1.00 | 5.00 | 3.00 |
| Employees on the product | 10% | 4.00 | 3.00 | 5.00 | 5.00 | 1.00 | 3.00 | 5.00 | 5.00 | 4.00 | 4.00 | 4.00 | 3.00 |
| Experience | 10% | 5.00 | 1.00 | 5.00 | 5.00 | 4.00 | 3.00 | 5.00 | 1.00 | 3.00 | 5.00 | 5.00 | 3.00 |
| Company revenue | 10% | 4.00 | 1.00 | 5.00 | 5.00 | 1.00 | 4.00 | 5.00 | 5.00 | 3.00 | 4.00 | 4.00 | 1.00 |
| Technology partners | 10% | 3.75 | 2.00 | 2.50 | 4.00 | 1.50 | 2.50 | 4.00 | 1.50 | 1.00 | 4.00 | 4.00 | 4.50 |

All scores are based on a scale of 0 (weak) to 5 (strong).

Source: Forrester Research, Inc.

VENDOR PROFILES

Leader

- **Microsoft Lync's unified client is the jack-of-all-trades for real-time communication.**

Redmond, Washington-based Microsoft's Lync has risen to prominence in UC in rapid fashion. It has the potential to become as ubiquitously used for video as SharePoint is for team sites since it is already installed in many organizations, but it is not necessarily used for all its functionality. With Lync 2013, Microsoft has improved support for videoconferencing and broadened its support for native apps on mobile platforms, two complaints with the previous version, Lync 2010. Videoconferencing improvements include support for the H.264 SVC codec, which improves video quality. Lync 2013 also adds more layouts for face-to-face and multipoint videoconferencing. Lync is an attractive choice for customers that want a product integrated with the rest of the Microsoft productivity and collaboration suite that provides users with a familiar experience. Microsoft has partnered with Crestron, Polycom, and Smart Technologies to develop Lync Room Systems for customers that want to extend that familiar Lync interface to their conference rooms.

Strong Performers

- **Avaya's Scopia Desktop is a great all-around choice for video quality and interoperability.**

Santa Clara, California-based Avaya acquired Radvision in 2012, benefiting customers by combining Avaya's leadership in telephony and Radvision's video quality and interoperability expertise to create a powerful UC platform. Avaya sells Scopia Desktop to enterprises as an add-on to its MCUs or as a part of the Avaya Aura collaboration pack (which also involves buying MCUs). Scopia Desktop uses the H.264 SVC codec and provides good quality over lossy networks. Companies using Scopia room-based systems benefit from additional bandwidth savings on calls with Scopia Desktop and administrators benefit from a shared management platform for both. Scopia Desktop has a lot of layout controls and is very configurable. It also works well on tablets. Both the mobile and PC applications have access to a unique feature that lets participants individually revisit previously shared content.

- **Cisco Jabber is a strategic fit for customers leveraging the Cisco stack for UC.** San Jose, California-based Cisco's Jabber scored the highest in the Forrester Wave in strategy. Jabber is tied into Cisco's Unified Communications Manager for call control, is tightly integrated with WebEx for webconferencing, and has native interoperability with Cisco TelePresence systems. Customer references we spoke to that were using Cisco infrastructure for telephony said that for them choosing Jabber was a no-brainer. Jabber is an all-in-one solution for presence and instant messaging (IM), video, voice, and voicemail, and the Cisco portfolio together represents a complete solution for real-time collaboration. Standalone, however, Jabber doesn't support persistent meeting rooms, scheduling features, and many in-meeting features present in other

products evaluated in the Forrester Wave. Jabber also requires VPN access for users wishing to connect from outside the firewall. For browser-based guest access and more online meetings features, users have to click the button in Jabber to escalate the call to WebEx.

- **Vidyo delivers the best desktop videoconferencing performance and quality for non-guaranteed networks.** Hackensack, New Jersey-based Vidyo is a fast-growing videoconferencing pure play. In contrast to our 2012 evaluation of Vidyo, during the 2013 Forrester Wave, it provided impressive enterprise customer references, each using its technology on a large scale. Vidyo's routing architecture shifts the heavy media-processing power from bridges to the endpoints, significantly reducing the cost per port to deploy videoconferencing. And its brand of the H.264 SVC codec maximizes quality according to network conditions. In our demo, Vidyo clearly delivered the best overall video quality, even with a large number of participants. Vidyo is foremost a provider of desktop videoconferencing but also sells room systems based on the same software and routing architecture. Its ability to deliver solutions from the desktop to the conference room puts it more squarely in competition with room-based vendors like Cisco, LifeSize, Polycom, and Radvision. Vidyo, however, requires a gateway for interoperability with standards-based room systems. Vidyo is a good choice if you want the best video quality and performance in variable network conditions.
- **IBM Sametime is a good fit for IBM collaboration customers.** Armonk, New York-based IBM's Sametime is an all-in-one solution for IM and presence, audio, video, and webconferencing. The IBM Sametime Unified Telephony Lite package enables softphone functionality and interoperability with room-based videoconferencing. In conjunction with IBM Connections, IBM has a comprehensive solution for real-time and asynchronous collaboration. This integration allows for interesting capabilities such as launching a video call from within a community with all the subscribed participants. IBM Sametime alone only supports active-speaker-switched video and requires third-party MCUs to enable continuous presence. IBM has partnerships with Polycom and Radvision for this. IBM spent 2012 enhancing its cloud offering and mobile capabilities and consolidated the code bases of its different meeting products (now called Sametime for the on-premises version and SmartCloud Meetings for the cloud version). As a result, IBM has not introduced new functionality in the on-premises Sametime offering. September, however, will see the release of IBM Sametime 9, a significant overhaul that will introduce more native videoconferencing features.
- **Polycom RealPresence CloudAXIS Suite is a solution for outside-the-company collaboration.** San Jose, California-based Polycom has a strong go-to-market partnership with Microsoft, offering room-based videoconferencing products that seamlessly integrate with Lync. However, Polycom has two of its own desktop videoconferencing products as well. CloudAXIS was released this year and allows users to send invites ad hoc to their contacts in Skype, Google Talk, and Facebook chat sessions. Recipients of those invites click on a link to launch the CloudAXIS application (after installing the plug-in) in a browser. They can also receive links to join via email or calendar invite. CloudAXIS provides a solution for outside-the-company collaboration using a customer's owned

infrastructure rather than in the public cloud. CloudAXIS is a good option for Polycom customers looking to extend the value of their existing Polycom infrastructure and management tools into a desktop videoconferencing strategy that provides easy guest access.

- **IOCOM's Visimeet is a modular, highly configurable solution for operational scenarios.** Chicago-based IOCOM's Visimeet is a relatively unknown but incredibly powerful solution. It uniquely allows customers to create multiple camera configurations, particularly useful to see what's going on in large spaces like auditoriums and lecture halls. Its flexible layouts — allowing for an unlimited number of movable, resizable video windows that can span multiple screens — also make it more useful than more rigid solutions in certain scenarios like war rooms or custom collaboration rooms. A healthcare customer uses it to monitor patients in a virtual ward. Visimeet is well suited for operational scenarios in the field because it provides good-quality video and also works well over satellite connections with low bandwidth. Multiple participants can share content and anyone can review someone else's previously shared content. It's also simple to deploy: Everything is contained in a single Linux box, including support for interoperability with room-based systems. The product has comprehensive management controls, monitoring tools, and dashboards for admins.

Contenders

- **PGi iMeet is a hybrid product that simplifies and humanizes the virtual meeting experience.** Atlanta-based PGI is the third-largest provider of audioconferencing in the world and has also had strong success selling webconferencing. Based on that experience, PGI decided to build two webconferencing products focused on usability, including easy-to-join meetings in the browser without the need for downloads (since they are Flash-based): GlobalMeet is for meetings where the focus is on the content; iMeet is for meetings where the focus is on the people.² In iMeet, meetings take place in personalized rooms with customizable visual elements, social media integration, and profiles to encourage collaboration in a more comfortable setting. The product uses low bandwidth. It supports continuous presence but does not have many videoconferencing features. It does, however, support pixel-for-pixel fidelity content and screen sharing.
- **Blue Jeans Network is a cloud-based meet-me service with the broadest any-to-any interoperability.** Mountain View, California-based Blue Jeans Network has a virtualized cloud that replaces videoconferencing infrastructure on-premises with a variety of subscription pricing models. It also has the best interoperability support of all vendors in the evaluation, including support for things like bidirectional content sharing with Lync and "H.264 High Profile" (a technology that enables bandwidth savings) when talking to Polycom endpoints. Another good measure of the strength of its interoperability is the high quality of video on calls between different form factors and third-party clients connecting to the service. Blue Jeans Network first became known for enabling participants on room-based systems to bring in callers on Skype. Its browser plug-in, however, has since converted many of those customers that were using Skype with the Blue Jeans Network's service. Blue Jeans Network's platform is excellent; its browser client — which

much of this evaluation is based on — is good at what it does but is still new and lacks many features and controls more mature products have.

- **Polycom RealPresence Desktop is a basic option for Polycom customers.** San Jose, California-based Polycom's RealPresence Desktop is the successor to its long-standing CMA Desktop videoconferencing product. RealPresence Desktop (and RealPresence Mobile for iOS and Android) is a straightforward option for customers with Polycom endpoints and infrastructure that want to extend participation to employees connecting from desktops, laptops, and mobile devices. RealPresence Desktop does not require any configuration to get started, but if it's registered to Polycom's MCUs, it enables directory integration. Admins benefit from a single management interface for desktop and room-based conferencing investments. And since RealPresence Desktop leverages Polycom MCUs, customers benefit from Polycom's interoperability with standards-based systems and with Microsoft Lync. RealPresence Desktop scored lower than CloudAXIS because it doesn't have the same browser connectivity and extended meeting invitation features.
- **LifeSize UVC ClearSea is an option for LifeSize room-to-desktop connectivity.** Austin, Texas-based LifeSize (a division of Logitech) is a leader in room-based videoconferencing and has introduced a number of desktop videoconferencing products over the years. ClearSea, its flagship desktop videoconferencing product today, was a pioneer two years ago for being one of the first solutions with mobile apps including support for interoperability with standards-based systems. ClearSea has some attractive video PBX features, such as the ability to ring all of a user's devices at once, to create custom call routing rules, and to transfer calls. It works seamlessly with LifeSize infrastructure and endpoints and allows admins to manage all the components of the videoconferencing estate together. LifeSize now offers its bridges, gateways, and ClearSea as virtualized software — allowing new customers to start small rather than have to make a significant upfront investment in specialized infrastructure that usually only comes in large capacities.
- **Microsoft Skype — the world's most used desktop video tool — is for individuals and for SMBs.** Redmond, Washington-based Microsoft intends Skype to be foremost a tool for consumers and secondarily a tool for small business. Unless your organization has blocked it, however, it's likely some employees are using it at work. In 2010, Skype announced that 40% of its calls involve video, but Microsoft says that number has risen since Skype added group video calling in 2011. Group video supports 10 participants in continuous presence and requires Skype Premium, which costs \$5 per month. Skype also supports screen sharing, but it is low-resolution compared with other products in this evaluation. Group video and content sharing aren't available on Skype's mobile applications. Skype is part of Microsoft's vision to provide communication solutions from the living room to the boardroom. Today, Skype and Lync users can add each other to their contact lists and communicate via IM and voice. Within a year, Microsoft will support video calling between the two platforms.

SUPPLEMENTAL MATERIAL

Online Resource

The online version of Figure 4 is an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings.

Data Sources Used In This Forrester Wave

Forrester used a combination of three data sources to assess the strengths and weaknesses of each solution:

- **Vendor surveys.** Forrester surveyed vendors on their capabilities as they relate to the evaluation criteria. Once we analyzed the completed vendor surveys, we conducted vendor calls where necessary to gather details of vendor qualifications.
- **Product demos.** We asked vendors to conduct demonstrations of their product's functionality. We used findings from these product demos to validate details of each vendor's product capabilities.
- **Customer reference calls.** To validate product and vendor qualifications, Forrester also conducted reference calls with three of each vendor's current customers.

The Forrester Wave Methodology

We conduct primary research to develop a list of vendors that meet our criteria to be evaluated in this market. From that initial pool of vendors, we then narrow our final list. We choose these vendors based on: 1) product fit; 2) customer success; and 3) Forrester client demand. We eliminate vendors that have limited customer references and products that don't fit the scope of our evaluation.

After examining past research, user need assessments, and vendor and expert interviews, we develop the initial evaluation criteria. To evaluate the vendors and their products against our set of criteria, we gather details of product qualifications through a combination of lab evaluations, questionnaires, demos, and/or discussions with client references. We send evaluations to the vendors for their review, and we adjust the evaluations to provide the most accurate view of vendor offerings and strategies.

We set default weightings to reflect our analysis of the needs of large user companies — and/or other scenarios as outlined in the Forrester Wave document — and then score the vendors based on a clearly defined scale. These default weightings are intended only as a starting point, and we encourage readers to adapt the weightings to fit their individual needs through the Excel-based tool. The final scores generate the graphical depiction of the market based on current offering,

strategy, and market presence. Forrester intends to update vendor evaluations regularly as product capabilities and vendor strategies evolve. For more information on the methodology that every Forrester Wave follows, go to <http://www.forrester.com/marketing/policies/forrester-wave-methodology.html>.

Survey Methodology

Forrester's Forrsights Networks And Telecommunications Survey, Q1 2013, was fielded to 2,487 IT executives and technology decision-makers located in Canada, France, Germany, the UK, and the US from SMB and enterprise companies with two or more employees. This survey is part of Forrester's Forrsights for Business Technology and was fielded from January 2013 to March 2013. ResearchNow fielded this survey online on behalf of Forrester. Survey respondent incentives include points redeemable for gift certificates. We have provided exact sample sizes in this report on a question-by-question basis.

Forrester's Enterprise And SMB Networks And Telecommunications Survey, North America And Europe, Q1 2010, was fielded to 2,247 IT executives and technology decision-makers located in Canada, France, Germany, the UK, and the US from SMB and enterprise companies with two or more employees. This survey is part of Forrester's suite of Business Data Services studies. Forrester fielded the survey from March 2010 to April 2010. LinkedIn Research Network fielded this survey online on behalf of Forrester. Survey respondent incentives included gift certificates and research summaries. We have provided exact sample sizes in this report on a question-by-question basis.

Forrester's Forrsights Workforce Employee Survey, Q4 2012, was fielded to 9,766 information workers located in Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Japan, Malaysia, Mexico, the Philippines, Russia, Singapore, the UK, and the US from small and medium-size business (SMB) and enterprise companies with 20 or more employees. This survey is part of Forrester's Forrsights for Business Technology and was fielded during September 2012 and October 2012. Toluna fielded this survey online on behalf of Forrester. Survey respondent incentives include points redeemable for rewards, as well as sweepstakes entries. We have provided exact sample sizes in this report on a question-by-question basis.

Forrester's Forrsights Workforce Employee Survey, Q4 2011, was fielded to 9,912 technology end users located in Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Japan, Malaysia, Mexico, New Zealand, the Philippines, Russia, Singapore, the UK, and the US from small and medium-size business (SMB) and enterprise companies with 20 or more employees. This survey is part of Forrester's Forrsights for Business Technology and was fielded from September 2011 to November 2011. Toluna fielded this survey online on behalf of Forrester. Survey respondent incentives include points redeemable for rewards, as well as sweepstakes entries. We have provided exact sample sizes in this report on a question-by-question basis.

Forrester's Forrsights Workforce Employee Survey, Q3 2010, was fielded to 5,519 technology end users located in Canada, France, Germany, the UK, and the US from SMB and enterprise companies with 20 or more employees. This survey is part of Forrester's Forrsights for Business Technology and was fielded during July 2010 and August 2010. Toluna fielded this survey online on behalf of Forrester. Survey respondent incentives include points redeemable for rewards, as well as sweepstakes entries. We have provided exact sample sizes in this report on a question-by-question basis.

Each calendar year, Forrester's Forrsights for Business Technology fields business-to-business technology studies in 17 countries spanning North America, Latin America, Europe, and developed and emerging Asia. For quality control, we carefully screen respondents according to job title and function. Forrester's Forrsights for Business Technology ensures that the final survey population contains only those who use a PC or smartphone for work at least 1 hour per day. Additionally, we set quotas for company size (number of employees) and job function as a means of controlling the data distribution. Forrsights uses only superior data sources and advanced data-cleaning techniques to ensure the highest data quality.

Integrity Policy

All of Forrester's research, including Forrester Wave evaluations, is conducted according to our integrity policy. For more information, go to <http://www.forrester.com/marketing/policies/integrity-policy.html>.

ENDNOTES

- ¹ In Forrester's 58-criteria evaluation of webconferencing products, we identified the 11 most significant products — Adobe Connect, AT&T Connect, Cisco WebEx, Citrix GoToMeeting, FuzeBox FuzeMeeting, IBM Sametime, IBM SmartCloud Meetings, InterCall Unified Meeting, Microsoft Lync, PGI GlobalMeet, and Saba Meeting — in the category and researched, analyzed, and scored them. This report details our findings about how well each product fulfills our criteria and where they stand in relation to each other to help the collaboration leadership team select the right webconferencing solution for the company's environment. See the September 13, 2013, "[The Forrester Wave™: Webconferencing, Q3 2013](#)" report.
- ² For more information about PGI's GlobalMeet, see the September 13, 2013, "[The Forrester Wave™: Webconferencing, Q3 2013](#)" report.

About Forrester

A global research and advisory firm, Forrester inspires leaders, informs better decisions, and helps the world's top companies turn the complexity of change into business advantage. Our research-based insight and objective advice enable IT professionals to lead more successfully within IT and extend their impact beyond the traditional IT organization. Tailored to your individual role, our resources allow you to focus on important business issues — margin, speed, growth — first, technology second.

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