

Select a Web Conferencing Vendor

Hear me, see me, show me, teach me.

Introduction

The Web Conferencing Vendor Landscape is dominated by established vendors each offering their own flavor. Use cases will determine best fit.

This Research is Designed for:

- ✓ Enterprises seeking to select a solution for Web conferencing.

- ✓ Their Web conferencing use case may include:
 - Conducting Webinars
 - e-Learning
 - Delivering remote support
 - Internal/external communications & collaboration.

This Research Will Help You:

- ✓ Understand what's new in the Web conferencing market.

- ✓ Evaluate Web conferencing vendors and products for your enterprise needs.

- ✓ Determine which products are most appropriate for particular use cases and scenarios.

Executive Summary

- The Web Conferencing market has matured and the new features to evaluate are real-time communications as a service platform and mobile functionality.
- Among the products evaluated, Adobe Connect and Cisco WebEx are the clear champions, and remain so even when product price for performance is accounted for.
- These two products aren't recommended for every use case, as other products are better aligned with particular scenarios, e.g. internal communication or remote support.

Market Overview

How it got here

- Evolved from early peer-to-peer desktop conferencing tools and simple server-based collaboration tools.
- Web conferencing is assimilating IM services rather than IM assimilating emerging and richer collaboration services.
- Dominated by five key enterprise vendors: Adobe, Cisco, Citrix, IBM, and Microsoft.

Where it's going

- **Commoditization** of core Web conferencing functionality as Software-as-a-Service (SaaS) lowers entry barriers for niche, low-end Web conferencing services.
- Real time communication as a **service platform** for custom development rather than simple tools.
- The transformation of **mobile use** from simple mobile participation to purpose-driven ad-hoc use, e.g. setting up meetings from the field.
- Increased **integration** between Web conferencing concepts and collaboration tools, ultimately improving end-user experience.

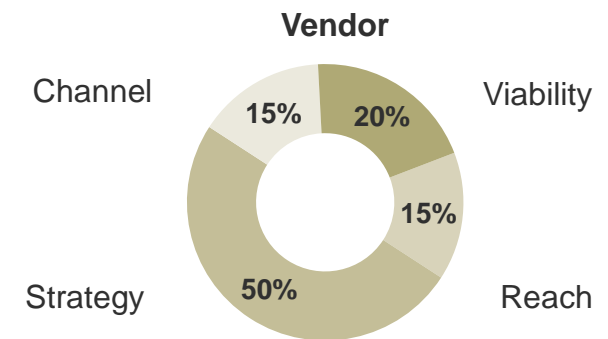
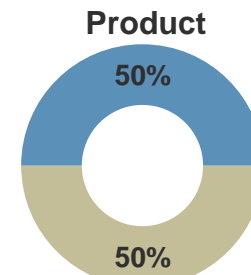
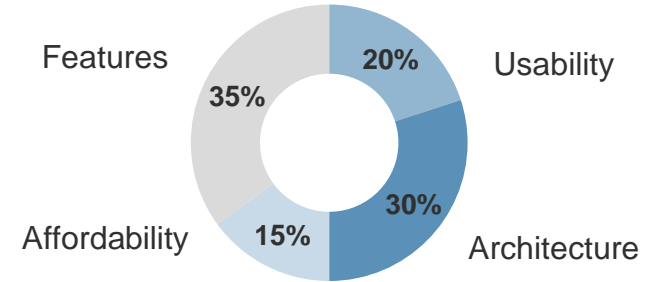
Web Conferencing Criteria & Weighting Factors

Product Evaluation

Features	The solution provides basic and advanced feature/functionality.
Affordability	The five year TCO of the solution is economical.
Usability	The solution's dashboard and reporting tools are intuitive and easy-to-use.
Architecture	The delivery method of the solution aligns with what is expected within the space.

Vendor Evaluation

Viability	Vendor is profitable, knowledgeable, and will be around for the long-term.
Strategy	Vendor is committed to the space and has a future product and portfolio roadmap.
Reach	Vendor offers global coverage and is able to sell and provide post-sales support.
Channel	Vendor channel strategy is appropriate and the channels themselves are strong.



The Info-Tech Web Conferencing Vendor Landscape™

Champions receive high scores for most evaluation criteria and offer excellent value. They have a strong market presence and are usually the trend setters for the industry.

Emerging players are newer vendors who are starting to gain a foothold in the marketplace. They balance product and vendor attributes, though score lower relative to market Champions.

Innovators have demonstrated innovative product strengths that act as their competitive advantage in appealing to niche segments of the market.

Market Pillars are established players with very strong vendor credentials, but with more average product scores.



For a complete description of Info-Tech's Vendor Landscape methodology, see the Appendix.

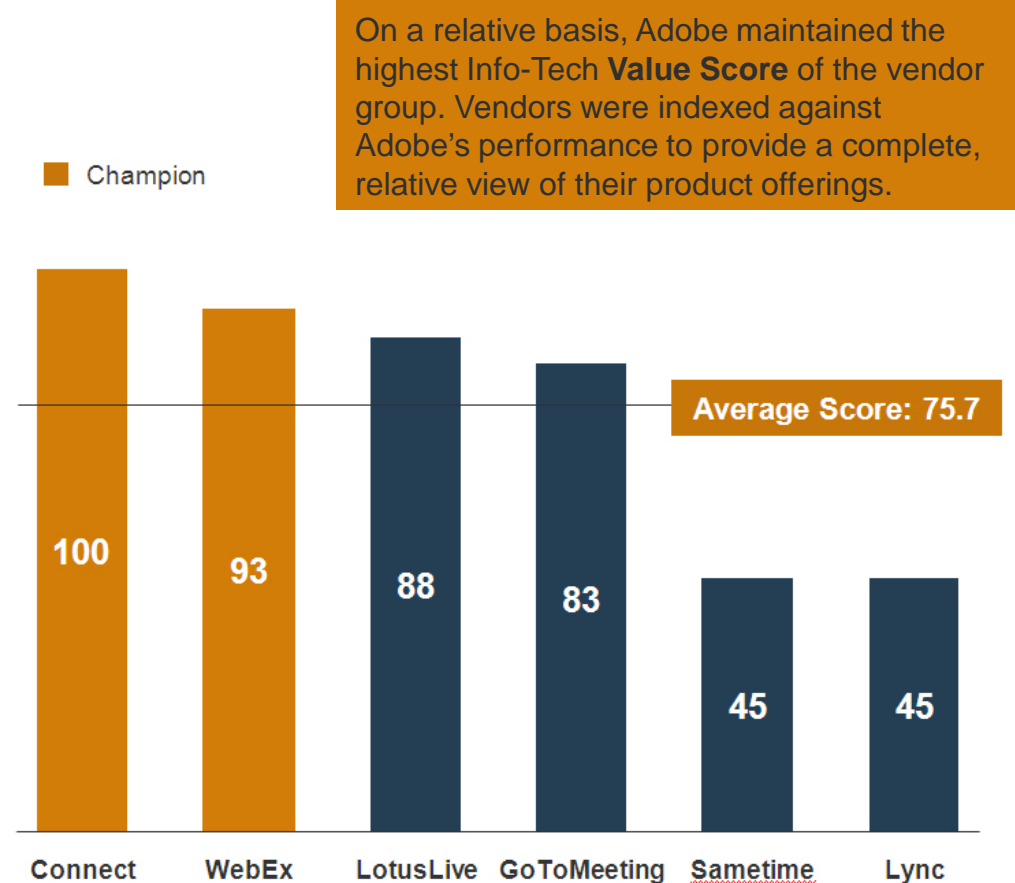
Adobe Connect and Cisco WebEx offer the best value

What is a Value Score?

The Value Score indexes each vendor's product offering and business strength **relative to their price point**. It **does not** indicate vendor ranking.

Vendors that score high offer more **bang for the buck** (e.g. features, usability, stability, etc.) than the average vendor, while the inverse is true for those that score lower.

Price-conscious enterprises may wish to give the Value Score more consideration than those who are more focused on specific vendor/product attributes.



Sources:

1. To calculate the Value Score for each vendor, the affordability raw score was backed out, the product scoring reweighted, and the affordability score multiplied by the product of the Vendor and Product scores.

Every vendor has its strengths & weaknesses; pick the one that works best for you

	Product				Vendor			
	Features	Usability	Affordability	Architecture	Viability	Strategy	Reach	Channel
Adobe Connect	●	●	◐	●	●	◐	◐	●
Cisco WebEx	◐	●	◐	◐	●	◐	●	●
Citrix GoToMeeting	◐	●	◐	◐	◐	◐	◐	◐
IBM LotusLive	◐	◐	◐	◐	◐	◐	●	●
IBM Lotus Sametime	◐	◐	◐	◐	◐	◐	●	●
Microsoft Lync	◐	◐	◐	◐	●	◐	●	●

Harvey Ball scores are indicative of absolute performance ratings but are not an exact correlation. Exceptional performance receives a full ball, poor performance an empty one, with a range in between.

Every vendor in the game has the basic table stakes, but who goes above & beyond in the areas that matter to you?

The Table Stakes

Desktop Sharing	Participants can view the presenter's desktop.
Application Sharing	Presenters are able to share particular applications only.
File Sharing	Presenters are able to share files with participants.
Audio over IP	The product supports audio over IP.
Internal Chat	The product has an internal client for participant chatting.
Recording & Replay	Meetings are recorded and can be replayed at a later time.

What Does This Mean?

The products assessed in this Vendor Landscape™ meet, at the very least, the requirements outlined as Table Stakes.

Many of the vendors go above and beyond the outlined Table Stakes, some even do so in multiple categories. This section aims to highlight the products capabilities **in excess** of the criteria listed here.

**Info-Tech
Insight**

If Table Stakes are all you need from your Web Conferencing solution, the only true differentiator for the organization is price. Otherwise, dig deeper to find the best price to value for your needs.

Table Stakes aside, vendors were evaluated on their individual advanced feature offering

Advanced features scoring methodology:

Info-Tech scored each vendor's features offering as a summation of their individual scores across the listed advanced features. Vendors were given 1 point for each feature the product inherently provided. Some categories were scored on a more granular scale with vendors receiving half points (see Partial functionality criteria).

Features	What We Looked For
High Quality Video	Product supports high quality video (above one megapixel).
External Chat	XMPP integration with an external chat client.
Whiteboard	A whiteboard for sharing and content creation is available.
Participation	Hand-raising and other e-learning conducive functionality. Partial: Available with add-on.
Polling	Participants can be polled through quizzes or surveys.
SIP Integration	Voice/video integrate with Session Initiation Protocol (SIP).
PSTN Integration	Voice can be achieved through phone networks (PSTN).
Policy-driven Security	Sharing permissions can be dictated by IT policies beyond the user's control.
Persistent Rooms	Rooms remain active once a meeting has finished and can be resumed later.
Service-based Platform	Product offers a services platform for developing APIs.
Authoring Kits	Content (e.g. Webinars) can be authored for replay ahead of time.
Branded Service	Can create vanity URLs for particular organizations and/or individuals.
Mobile	iOS, BlackBerry, and Android or Windows Phone 7. Partial: Any mobile device support.

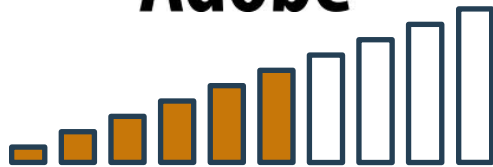
Adobe Connect may not be top of mind, but it is the top evaluated Web conferencing product in the landscape

Champion

Product: Connect
Employees: 8,660
Headquarters: San Jose, CA
Website: Adobe.com/Products/AdobeConnect
Founded: 1982
Presence: NASDAQ: ADBE
FY09 Revenue: \$2.95B



Adobe



Priced between \$50,000 and \$100,000

Overview

- Platform agnostic approach to Unified Communications.
- True SaaS, true on-premise, and managed hosting deployment options. Platform as a Service (PaaS) separate.
- Requires Flash Player (except on iPhone).

Strengths

- Strongest features & architecture among products evaluated.
- Services-oriented platform enables custom app development.
- E-learning is best of breed among products evaluated.
- Effective tool for delivering Webinars.
- Smartphone apps that support mobile cameras.
- Strong security controls with SSL, customized authentication.

Challenges

- Low mindshare and market share compared to competitors.
- Not designed for remote desktop technical support.
- Price point is not a differentiator, which does not improve Adobe Connect's market share.
- iPad compatible, but not optimized (iPhone mode with pixel doubling).

Info-Tech Recommends:

With a reasonable price point, and best-of-breed features and architecture, Adobe Connect is easy to recommend for virtually all Web conferencing scenarios, remote technical support aside.

Cisco WebEx Meeting Center offers a strong Web conferencing product and scores as the strongest vendor in the landscape

Champion

Product: WebEx Meeting Center
Employees: 73,000
Headquarters: Santa Clara, CA (WebEx)
Website: WebEx.com
Founded: 1995 (WebEx)
Presence: NASDAQ: CSCO
FY10 Revenue: \$40.04B



Overview

- Largest market share in the Web conferencing landscape (about 50%).
- Localization in 10 languages, support for Windows, Mac, Linux, Unix, and Solaris.

Strengths

- Comprehensive advanced features.
- Strong solution for delivering Webinars, providing remote support, and e-learning (through Support Center, Training Center).
- Offers branded service, i.e. vanity URLs and personal meeting rooms.

Challenges

- Persistent meeting rooms with saved content are not currently offered.
- Available only as a Web conferencing bundle, not as PaaS. However Cisco does offer an asynchronous collaboration platform, Cisco Quad, and other real-time communications products in their UC product line.

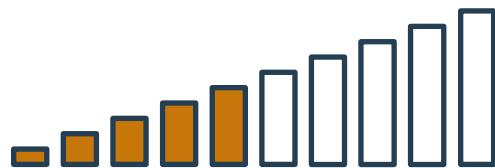
Info-Tech Recommends:

While scoring a close second on our product index, Cisco WebEx Meeting Center is a market leader and an easy-to-recommend product with a strong collaboration vendor behind it.

IBM LotusLive is an affordable, easy-to-use tool, though IBM Lotus Sametime trumps it features-wise

Emerging Player

Product: LotusLive Meetings
Employees: 426,751 (IBM)
Headquarters: Armonk, NY
Website: LotusLive.com
Founded: 1911
Presence: NYSE: IBM
FY10 Revenue: \$99.87B



Priced between \$25,000 and \$50,000

Overview

- IBM's Lotus Web conferencing solution is designed for customers and business partners.
- Full SaaS product.

Strengths

- Offers Webinar delivery functionality.
- Can be integrated with IBM Lotus platform for additional functionality.
- LotusLive is supported by IBM's vendor strength, reach, and channel strategy.
- Pricing is competitive.

Challenges

- Authoring kits for creating Webinar content ahead of time are not available.
- Not as robust a Web conferencing tool as IBM Lotus Sametime.
- IBM's positioning of LotusLive vs. Sametime remains unclear.

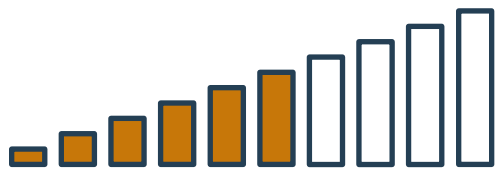
Info-Tech Recommends:

LotusLive suffers from unclear positioning relative to IBM Lotus Sametime. It is a functional, affordable solution for LotusLive customers, but lacks a unique value proposition in the wider market.

IBM Lotus Sametime is a strong collaboration tool, but its pricing model and usability don't suit Web conferencing well

Emerging Player

Product: Lotus Sametime
Employees: 426,751 (IBM)
Headquarters: Armonk, NY
Website: IBM.com/Lotus/Sametime
Founded: 1911
Presence: NYSE: IBM
FY10 Revenue: \$99.87B



Priced between \$50,000 and \$100,000

Overview

- IBM Lotus's Unified Communications and collaboration solution.
- Integration with IBM Lotus, IBM WebSphere, and Microsoft products.

Strengths

- With robust participation features and persistent rooms, Sametime's architecture and advanced features are categorically more impressive than LotusLive's.
- Strong cross-platform support for mobile devices.
- PaaS option enables custom enterprise app development.

Challenges

- Not designed for Web conferencing outside the organization.
- Similarly, Sametime is not recommended for remote support, Webinar, or e-learning use cases.
- IBM's positioning of LotusLive vs. Sametime remains unclear.

Info-Tech Recommends:

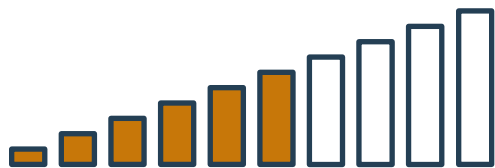
IBM Lotus Sametime offers strong enterprise functionality, though positioning as a Web conferencing tool is unclear. A clearer positioning strategy for the IBM real-time portfolio is needed.

Microsoft Lync is a quality product though high price hampers its value proposition for Web conferencing

Emerging Player

Product: Lync
Employees: 89,000
Headquarters: Redmond, WA
Website: Microsoft.com/Lync
Founded: 1975
Presence: MSFT
FY10 Revenue: \$62.48B

Microsoft®



Priced between \$50,000 and \$100,000

Overview

- Positioned as Microsoft's flagship Unified Communications and live collaboration product as Live Meeting is phased out.

Strengths

- Very strong product architecture, including SIP and PSTN integration, customizable sharing security, cross-platform mobile functionality and full UC integration with Exchange and SharePoint.
- Offers both on-premise and SaaS deployment.
- Strong basic and advanced Web conferencing features.

Challenges

- Designed as a Unified Communications solution, and not recommended as a tool for Webinars, remote support, or e-learning.
- Given its Unified Communications angle, Lync was, by a wide margin, the most expensive product evaluated.
- Does not offer persistent rooms without SharePoint.

Info-Tech Recommends:

Despite a high relative price point and an unclear product strategy concerning LiveMeeting, Microsoft Lync is a strong enterprise Web conferencing tool with robust functionality and architecture.

Citrix GoToMeeting has strong core features and an impressive roadmap but isn't a market champion yet

Emerging Player

Product: GoToMeeting
Employees: 5,600
Headquarters: Fort Lauderdale, FL
Website: GoToMeeting.com
Founded: 1989
Presence: NASDAQ: CTXS
FY10 Revenue: \$1.87B



Overview

- Second largest Web conference player, through Citrix Online.
- Most common use cases are project & client meetings, communications, sales, training, and marketing.
- Requires a proprietary client installation for all users (Java).

Strengths

- Provides the standard, core features required in Web conferencing and executes these features strongly and consistently.
- Known for ease-of-use by end users.
- Support for iPad (v1 and 2).
- The product roadmap is impressive.

Challenges

- Video support is in development. SIP and PSTN integration remain roadmap items.
- Use cases such as Webinar delivery and e-learning require specialized products.
- No security controls for application-level sharing.
- No plans for PaaS.

Info-Tech Recommends:

GoToMeeting provides core Web conferencing features and executes those features very well. But other vendors offer more advanced features for the same relative price.

Select your product based on your use case; they aren't interchangeable

The tools needed to teach a group vs. help an individual vs. present to an audience are all different. Make sure you get the tools you need most.

1

Use Case



2

Mobile Workforce



3

Internal vs. External



*Separate product, not evaluated

Everyone supports Apple iOS, but if you've standardized on something else, select accordingly

Ad hoc mobile meetings are the future of Web conferencing. Ensure your corporate device platform is supported and desired functionality is offered.

1

Use Case

Apple iOS



Microsoft®



2

Mobile Workforce

BlackBerry



Windows Phone 7



3

Internal vs. External

Android



Web Conferencing products excel at internal or external communication, but not both... select accordingly

Some products are designed and positioned for collaboration with internal stakeholders while others are deliberately designed for external meetings.

.....
Internal/Unified Communication

1 Use Case



2 Mobile Workforce

.....
External

3 Internal vs. External



Appendix

Methodology – Vendor Landscape & Harvey Balls

Info-Tech Research Group's Vendor Landscape market evaluations are a part of a larger product selection solution set, referred to as a 'Select Set.'

From the domain experience of our analysts, a vendor/product shortlist is established. Product briefings are requested from each of these vendors, asking for information on the company, products, technology, customers, partners, sales models and pricing.

Our analysts then score each vendor and product across a variety of categories, on a scale of 0-20 points. The raw scores for each vendor are then normalized to the other vendors' scores to provide a sufficient degree of separation for a meaningful comparison. These scores are then weighted according to weighting factors that our analysts believe represent the weight that an average client should apply to each criteria. The weighted scores are then averaged for each of two high level categories: vendor score and product score. A plot of these two resulting scores is generated to place vendors in one of four categories: Champion, Innovator, Market Pillar, and Emerging Player.

For a more granular category by category comparison, analysts take the individual scores for each vendor/product in each evaluation category before they are normalized with the other vendor scores and convert those to a scale of zero to four whereby exceptional performance receives a score of four and poor performance receives a score of zero. These scores are represented with "Harvey Balls", ranging from an open circle for a score of zero to a filled in circle for a score of four. Harvey Ball scores are indicative of absolute performance by category but are not an exact correlation to overall performance.

Individual scorecards are then sent to the vendors for factual review, and to ensure no information is under embargo. We will make corrections where factual errors exist (e.g. pricing, features, technical specifications). We will consider suggestions concerning benefits, functional quality, value, etc; however, these suggestions must be validated by feedback from our customers. We do not accept changes that are not corroborated by actual client experience or wording changes that are purely part of a vendor's market messaging or positioning. Any resulting changes to final scores are then made as needed, before publishing the results to Info-Tech clients.

Vendor Landscapes are refreshed every 12 to 24 months, depending upon the dynamics of each individual market.

Methodology – Value Index

Info-Tech Research Group's Vendor Landscape market evaluations are a part of a larger product selection solution set, referred to as a 'Select Set.'

The Value Index is an indexed ranking of value per dollar as determined by the raw scores given to each vendor by analysts. To perform the calculation, Affordability is removed from the Product score and the entire Product category is reweighted to represent the same proportions. The Product and Vendor scores are then summed, and multiplied by the Affordability raw score to come up with Value Score. Vendors are then indexed to the highest performing vendor by dividing their score into that of the highest scorer, resulting in an indexed ranking with a top score of 100 assigned to the leading vendor.

The Value Index calculation is then repeated on the raw score of each category against Affordability, creating a series of indexes for Features, Usability, Viability, Strategy and Support, with each being indexed against the highest score in that category. The results for each vendor are displayed in tandem with the average score in each category to provide an idea of over and under performance.

The Value Index, where applicable, is refreshed every 12 to 24 months, depending upon the dynamics of each individual market.