The Forrester Wave: Room-Based Videoconferencing, Q3 2012

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Overview/Findings

In Forrester's 39-criteria evaluation of videoconferencing solution vendors, they identified the seven most significant providers in the category — Cisco, Huawei, LifeSize, Polycom, Radvision, Teliris, and Vidyo — and researched, analyzed, and scored them. Leaders that emerged have broad product portfolios with deep integration into unified communications (UC) infrastructure, while Strong Performers pursue a more focused strategy, excelling in particular market niches or in particular regions. This report details Forrester findings about how well each vendor fulfills the criteria and where they stand in relation to one another to help IT professionals select the right provider for their environment.

Leaders have a complete portfolio of offerings

Traditional heavyweights Polycom, Cisco, and LifeSize cover the most bases.
Cisco and Polycom in particular have the most options for immersive telepresence, room-based endpoints, and desktop hardware units. All three have comprehensive management platforms, recording and streaming solutions, multiple deployment options, leading interoperability, and options to integrate with popular UC platforms.
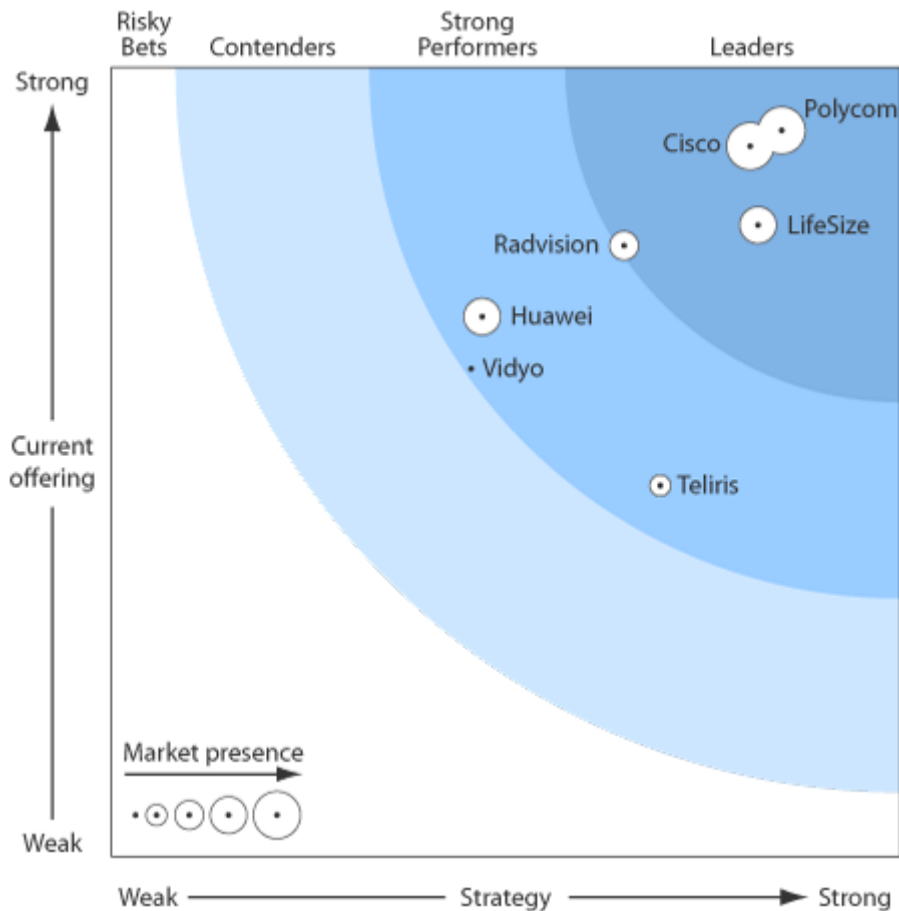
Resurgent Radvision has a competitive offering.
Coming in under the radar, Radvision (now an Avaya company) went from being an infrastructure provider to developing its own end-to end offering with an impressive set of room-based systems and desktop and tablet applications. It is separated from the other leaders by only a couple of points in strategy related to services offerings and cloud deployment options. For many companies, Radvision will fit the bill.

Teliris, Huawei, and Vidyo are moving quickly to provide complete solutions.
These vendors excel at a particular segment of the market and are expanding their offerings. Teliris is a leading provider of immersive telepresence and managed services. Huawei has a broad portfolio of endpoints and a stronghold on the Chinese market. Vidyo is a leader in desktop and mobile videoconferencing and is building room-based and immersive systems that run on its scalable architecture.

Wave Graphic/Scores

	Risky Bets	Contenders	Strong Performers		Leaders

Chart axes: Current offering (Weak to Strong, vertical), Strategy (Weak to Strong, horizontal), Market presence (bubble size).

Plotted: Polycom, Cisco, LifeSize, Radvision, Huawei, Vidyo, Teliris

	Forrester's Weighting	Cisco	Huawei	LifeSize	Polycom	Radvision	Teliris	Vidyo
CURRENT OFFERING	50%	4.50	3.42	4.00	4.60	3.87	2.35	3.09
Endpoint diversity	50%	4.65	3.75	3.70	4.60	3.90	2.20	3.50
Conferencing experience	25%	4.00	4.00	4.00	4.50	4.00	2.25	3.25
Quality of experience	10%	5.00	0.00	5.00	5.00	3.00	3.00	1.00
Management platform	5%	4.40	3.80	4.00	4.40	4.40	3.70	0.60
Recording and streaming	5%	4.00	3.00	4.00	4.00	4.00	0.00	3.00
Security and compliance	5%	5.00	4.00	5.00	5.00	4.00	4.00	5.00
STRATEGY	50%	4.05	2.35	4.10	4.25	3.25	3.48	2.28
Deployment options	15%	5.00	2.50	5.00	3.50	3.50	2.50	3.50
UC integration	20%	2.75	3.88	4.50	4.63	3.88	0.25	0.25
Interoperability	20%	4.00	3.00	4.00	5.00	3.00	4.00	1.00
Services	15%	4.00	3.00	3.00	3.00	1.00	5.00	3.00
Product road map	15%	5.00	1.00	3.00	5.00	3.00	5.00	3.00
Client reference scores	15%	4.00	0.00	5.00	4.00	5.00	5.00	4.00
Target markets	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00
MARKET PRESENCE	0%	4.56	3.19	3.06	4.25	2.44	1.06	0.75
Revenue	50%	5.00	3.50	3.00	4.00	2.75	1.00	0.00
Employees	25%	5.00	3.00	2.00	4.00	2.00	1.00	1.00
Partners	25%	3.25	2.75	4.25	5.00	2.25	1.25	2.00

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

Cisco Summary

Cisco has a range of video endpoints spanning desktop units to three-screen immersive telepresence studios. Its products show a strong emphasis on industrial design and on the user experience — many Cisco endpoints come with touchscreen controllers. Cisco's philosophy is to provide a "business-class" video experience, which it does best when customers also use Cisco's Medianet networking products. Cisco can also provide an integrated experience (and an opportunity for customers to consolidate vendors) with its WebEx and Jabber UC and collaboration solutions.

Accessing the Report

Access to the full text of the Wave is available only to named seat-holders. If you are not a seat-holder and would like to learn more about how to become one, please feel free to reach out and I'll get you pointed in the right direction.

Forrester seat holders can access the report here:
http://www.forrester.com/The+Forrester+Wave+Room+Based+Videoconferencing+Q3+2012/quickscan/-/E-RES61481#/The+Forrester+Wave+RoomBased+Videoconferencing+Q3+2012/fulltext/-/E-RES61481

As always, don't hesitate to reach out with any questions.

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