White Paper

The Business Case for Managed Rich Media Conferencing Services

A VCON Paper for Carriers and Service Providers

VCON
VISUAL COMMUNICATIONS

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Introducing Rich Media Conferencing

The term rich media is used in a variety of ways. In the design of websites it is used to denote dynamic motion of elements on a web page. In the advertising arena it is used to describe the use of animated graphics and multimedia. For the purposes of this white paper, the term rich media shall take on the definition adopted by Christine Perey, President of Perey Research and Consulting. Perey defines rich media as "the experience produced by a suite of converging digital audio and visual technologies including videoconferencing, streaming media, static imagery and text. In addition to the flexible composition of rich media, its other virtue is derived from the convenience it offers multimedia-enabled participants due to the independence of physical proximity and temporal constraints. In other words, provided the necessary network components are there to support it, the rich media experience can be easily stored, searched, navigated and reproduced." This definition follows most closely to the evolution and convergence of the conferencing (audio, video, text, data) and streaming video industries.

Videoconferencing is not a new high-tech business tool. In fact, it has been used since the early 1980s by a growing number of companies in a variety of industries. However, it has yet to reach the mass deployment stage. Part of the reason for this can be attributed to product price points and complex functionality. But another major barrier to wide-scale deployment of videoconferencing has been related to network readiness. Until recently, videoconferencing has been delivered almost exclusively over ISDN networks. Not only has this made device management difficult, it also goes against the current convergence trend that calls for aggregating voice, video, and data applications onto one common IP network infrastructure. The final inhibitor is related to the perceived value by users. Often times, standalone videoconferencing does not offer enough value to justify the cost of deployment and management. However, when video is integrated into a more comprehensive rich media conferencing solution, users are sure to see the value.

While this paper will use the familiar terms "videoconferencing" and "video over IP" in places, probably "visual communications" and "rich media conferencing" are better descriptors of the overall application opportunity that carriers have in front of them today. These terms imply more than simple two-way interactive video. They include streaming video, video telephony, collaboration, text messaging and advanced video-enabled applications. They also include video-enabled communications whereby the visual component is embedded as an intuitive value-add to some other form of communication. Examples include voice communications or instant messaging implemented in such a way that adding video is as simple as the push of a button.

The Market Opportunity for Managed Rich Media Conferencing Services

As consumers, home office workers, small businesses, corporations and government institutions look to reap the rewards of rich media conferencing applications, many of them will investigate the possibility of outsourcing the applications as a managed service. They will do this because they lack the necessary skills in-house, they want to reduce or eliminate the capital infrastructure costs associated with deploying the application, or because they need to complete the deployment rapidly. Usually any of these reasons lead to a bigger objective of reducing risk. And since the conferencing applications they are looking to utilize are virtually all IP-based, these customers will commonly look to providers of IP bandwidth (carriers, network service providers and ISPs) or application service providers (ASPs) for the outsourced solution. If these customers have existing relationships with IP-based carriers or xSPs, they will likely pursue them first. If not, they will go on a search.

From the perspective of the carrier or service provider, there is a different motivation to pursue rich media conferencing services. Typically, a service provider has one of three high-level strategies for growing revenue. One is to offer additional value add services to the existing client base while another is to recruit new clients with the existing suite of services. Of course, the third possibility is to pursue both of these strategies together.

For providers of IP bandwidth, the name of the game is filling up the network capacity with as many revenue-generating applications as possible. And the more demanding the application is from a bandwidth or complexity perspective, typically the more can be charged for it. For this reason, conferencing applications like

videoconferencing, streaming video and web-based data conferencing are ideal. They have fairly strict network demands that the service provider can fairly easily provide via bandwidth availability and management tools, and they have high-perceived value in the eyes of the client - especially if they are integrated to create a rich media conferencing experience as described previously. Often times, providers of pure IP bandwidth are not interested in delivering real applications. Rather, they want to optimize revenue from basic access and utilization of the network infrastructure they have built, while still capitalizing on some opportunity to deliver managed services. From the table below, the most logical revenue-enhancing services for such bandwidth and access providers are broadband/WAN access, remote administration of premise-based conferencing devices, VPN services and QoS services.

For ASPs or bandwidth providers that do want to deliver managed applications, the name of the game is outsourcing the management of applications of all sorts. The cost justification for the client is based on reduced costs and reduced risks. Often times, an ASP will offer a complementary suite of applications. A client that enters into a service for one application is a prime target for others in the future. For example, a client may start with a managed videoconferencing application service and then later add multipoint conferencing and streaming video services. Rich media conferencing applications can be complementary to virtually any other application. See the table below for some examples, many of which offer usage-based revenue enhancement. Another pricing approach for service providers is to bundle certain services and capabilities into a single monthly rate, similar to the cell phone pricing model.

In summary, carriers and service providers are in an ideal position to deploy managed rich media conferencing services for either revenue enhancement and/or competitive advantage with little to no incremental infrastructure investment. Additionally, it is well known that the defection rate of customers that subscribe to two or more services is significantly lower than those subscribing to a single service from whichever service provider offers the best price at the time.

Diverse Suite of Revenue-Enhancing Services

	Monthly Billing	Usage-Based Billing
Network Access, Management & QoS Services	✔	
Remote Device Administration	✔	
Instant Messaging	✔	
Conference Bridging Service		✔
ISDN Gateway Service		✔
Live Streaming of Conferences		✔
Conference Storage		✔
Video-on-Demand Streaming of Stored Conferences		✔
Web-Based Data Conferencing		✔
Web-Based Scheduling		✔
Video-Enabled Call Center Services	custom pricing	

Market Size and Forecasted Growth

The conferencing service provider industry can be separated into four distinct segments: audio conferencing, web data conferencing, multipoint videoconferencing services (video bridging) and IP video network services. While everyone is familiar with audio conferencing, some of the newer IP-based conferencing technologies might need some explanation. Web data conferencing allows users to share data with each other using standard Internet-based tools like a web browser. Multipoint videoconferencing services are used to connect more than two videoconferencing users into a conference, similar to the way an audio conference is hosted. Both audio conferencing and multipoint videoconferencing services can be further segmented into operator-attended versus unattended services. Finally, IP video network services involve a network topology and set of management services that uniquely meet the demanding requirements of interactive video.

Wainhouse Research reported in mid-2003 that the total worldwide market for conferencing services would grow from $3.0B (USD) in 2002 to $5.5B in 2008. The top-level breakdown of this market forecast by conferencing segment can be seen in the table below.

Market Size ($M)	2002	2003	2004	2005	2006	2007	2008	5-yr Growth
Audio Conferencing	$2,351	$2,660	$3,061	$3,399	$3,439	$3,379	$3,249	4.1%
Web-Based Data Conferencing	$314	$472	$627	$768	$896	$936	$949	15.0%
Multipoint Videoconferencing	$290	$278	$271	$263	$250	$240	$229	-3.8%
IP Video Network Services	$13	$59	$144	$533	$855	$1,069	$1,099	79.5%
Total	**$2,967**	**$3,469**	**$4,104**	**$4,963**	**$5,439**	**$5,624**	**$5,525**	**9.8%**

The worldwide revenue shown above can be further broken down by geographical region, with the North American market providing the largest portion of the revenue. However, the European and Asia Pacific markets have considerably higher growth rates. Also, while there is no specific market data for the Latin America region, the opportunity for conferencing service providers is very real there as well.

	2002	2008	Last 5-years
North America	$2.4B	$4.0B	7.3% growth
Europe	$0.4B	$0.9B	12.8% growth
Asia Pacific	$0.1B	$0.7B	30.8% growth

Possible Business Models

There are two common approaches existing conferencing service providers have taken. The top-tier carriers and bandwidth providers in a given market have the ability to create a set of services and take them direct to the end-user market or package them in such a way that a second tier of service providers (ASPs, ISPs and CSPs) can private label them and take them to market. Of course, a hybrid strategy is also possible. Also, a carrier or bandwidth provider will typically be in the best position to do this with services that are closest to their core competency, such as IP video networking.

An ISP, ASP or new breed conferencing service provider will typically obtain certain services like bandwidth and VPN services from a carrier while concentrating most of their added value in the conferencing applications themselves. Examples include audio conferencing, multipoint videoconferencing or web data conferencing.

Furthermore, conferencing service providers that build extreme proficiency in a given area can find themselves in a position to offer private-labeled application hosting services to other service providers. A good example is WebEx, who offers their services directly to end user customers while also making them available to other service providers.

According to Wainhouse Research (December 2002), generally the top 6-8 conferencing service providers in any region comprise about 80% of the market revenues. Probably the most important factor in determining the best business model is to first leverage existing core competencies. Then determine if a single or two-tier channel model (or both) is best for taking the services to the market.

Target Markets

There is no right or wrong answer about the best target market to approach. In fact, just the word "market" can be segmented in different ways when it comes to the delivery of managed rich media conferencing services. One typical method is to segment by customer type: consumer, small-medium business or enterprise. Another method is to segment by industry vertical: healthcare, legal, education, etc. The reality is that existing carriers and service providers already have a very good understanding of their existing customer base. And whatever it is, virtually all customer types are ideal targets for rich media conferencing services for one reason or another.

With this said, below are just a few examples that demonstrate the diversity and value that is possible.

- **Home office worker (teleworker)** - Such workers have tremendous communication demands. Often times, such workers are in a sales role, which opens many opportunities. Web-based data conferencing can be used to "push" briefing presentations to remote prospects during a phone conversation. Audio conferencing services are regularly used. And while on the road, being able to connect via videoconference back to the home office offers tremendous benefits.
- **Law firm** - Audio conferencing and data conferencing services can regularly be used during interaction with clients and for contract negotiations. Videoconferencing can be used for interviewing potential witnesses remotely, instead of paying travel costs to have them come into the law office.
- **Consumer video chat** - Instant messaging services are currently very popular with consumers. In order to turn such a service into a revenue generator, live videoconferencing capabilities can be added to create a video chat service.
- **Video-enabled call center** - Ideal for a large enterprise that wants to provide best-of-breed customer service to their VIP customers. Instead of a normal audio call center, the addition of visual communications gives a relationship-enhancing value that cannot otherwise be achieved without a face-to-face meeting. Another way a video-enabled call center can be used is for kiosk-based walkup services. An example is a large bank that distributes video-enabled kiosks throughout all of their branches as well as retail outlets where their customers commonly shop. In addition to general informational services that can be provided via such kiosks, with the click of a button the customer can be in a live videoconference with a loan specialist to consult with them about a loan (for example).
- **Quarterly financial earnings conferences** - Great for publicly-traded companies, who are required to regularly communicate with their shareholders. Instead of simply hosting a large audio conference, data could be shared in realtime over the Internet to people with a web browser. At the same time, a live video stream could also be provided for shareholders or analysts that want to feel closer to the company that an audio conference will allow. This video stream can be stored and later accessed via video-on-demand services over the Internet.

Examples of Existing Conferencing Service Providers

There are an infinite number of ways to bundle and price conferencing services. The table below shows some examples of a few conferencing service providers and some information about their specific business model and bundled pricing offerings. The information in the table was obtained in September 2003 from publicly available information such as the company's website or press releases. Additionally, the Appendix at the end of this paper contains a listing of 184 conferencing service providers around the world and the service categories they offer.

	IntelliNet	V-SPAN	Time 2 Talk Communications
Region	United States	United States, Canada, UK	UK
Type	Videoconferencing ASP	Conferencing Service Provider	Regional Voice Carrier
Primary Offerings	Videoconferencing, endpoint and network monitoring, ISDN gateway services	Videoconferencing, video network management, audio conferencing, web data conferencing, streaming video, event management	Wireless voice services
Other services	Web-based scheduling, automatic call launching, realtime usage reporting	Scheduling	Text messaging, videoconferencing, picture messaging, video messaging, email
Pricing Example	Unlimited videoconferencing usage for $899/mo	Not published	VideoTalk 500: £25 per month for 500 voice minutes + £10 worth of video calling and other video services at no charge for the first 3 months
Pricing Example	20 hours videoconferencing usage for $599/mo (+$50 for 10 more hours)		VideoTalk 1000: £60 per month for 1000 voice minutes, 50 picture messages, 50 minutes of video calling and 50 video messages
Other Information	Formed partnership in August '03 with Conferserv for streaming video services	Claim that 33% of the Fortune 100 companies use V-SPAN conferencing services	

According to a June '03 Wainhouse Research Spotcheck report on the conferencing service provider market, the average market rates for select videoconferencing services are as follows:

20 hours/month at 384Kbps:

- $385 - 699/month
- Price difference between the low end and the high end typically varies based on the inclusion of services such as reporting, scheduling, and device monitoring
- MCU pricing per port: $40 - 50/hour
- ISDN gateway pricing $0.48 - 1.56/minute

Unlimited Usage at 384Kbps:

- $525 - 899/month
- Price difference between the low end and the high end typically varies based on the inclusion of services such as reporting, scheduling, and device monitoring
- MCU pricing per port: $0 - 60/hour
- ISDN gateway pricing $0.41 - 1.00/minute

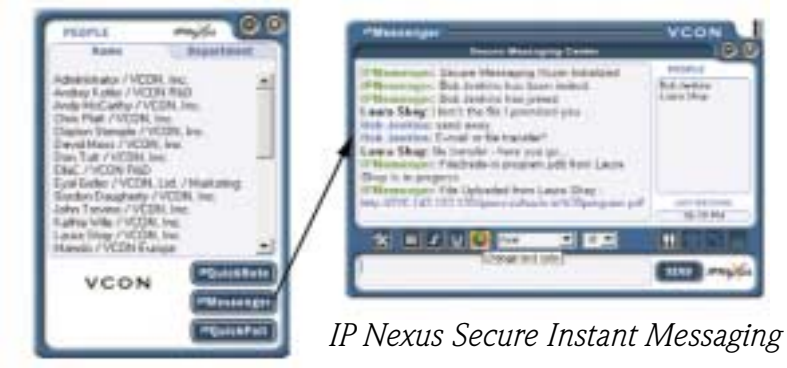
Applications

Carriers and service providers are able to charge for basic services such as networking and management. However the most added value and competitive differentiation often comes from providing real conferencing applications. And when these applications are integrated into a rich media conferencing experience for the user, the added value is certainly elevated. After all, end users don't care about technology. They care about the benefits derived from real applications that have a positive effect on their personal or business life. VCON offers numerous conferencing applications that integrated into a centralized infrastructure for management, administration, security and scalability. Examples of such applications are below:

Multipoint Videoconferencing and Streaming Video: The VCON Conference Bridge (VCB) is VCON's application solution for multipoint videoconferencing and streaming video. With the VCB, multipoint conferences involving fully interactive participants can be simultaneously streamed to hundreds or thousands of other users that are passively participating in the conference. This integration of interactive and streaming video offers significant advantages of scalability and bandwidth efficiency. VCON even offers a no-charge Broadcast Viewer for the passive participants. Combined with IPNexus, these passive participants could even engage in interactive text messaging with the other participants and could view the data being shared as part of a web-based data conference.

Audio Conferencing: The VCON Interactive Group Communication (IGC) server is VCON's application solution for audio conferencing. It is highly scalable and allows the service provider to offer both attended and unattended audio conferencing services. Another unique attribute of the IGC comes from its patented IMinControl technology, which gives each user complete control over their audio conference experience. The IGC uniquely mixes the conference for each participant. This gives users features such as private whisper, sidebar conversations and external consultation - all via a web-based client application that requires no pre-installation by the user. Additionally, the IGC has a conference manager application specifically written for handheld wireless devices such as the RIM Blackberry.

Instant Messaging and Data Conferencing: IPNexus is VCON's application solution for instant messaging and web-based data conferencing. With IPNexus, users can engage in secure instant messaging sessions and then add rich media as appropriate. One option is to seamlessly integrate data conferencing into the session (for example, screen sharing or file transfer). Another option is to click a button to automatically initiate a videoconference with the other participants of the chat session. This seamless migration from one form of communication to another is so intuitive that all the users need to think about is whether rich media adds value at some point in the session. See below a screen shot for IPNexus' standard chat window.



IP Nexus Secure Instant Messaging

Web-Based Scheduling: The VCON Conference Moderator is VCON's application solution for web-based scheduling and multipoint conference moderation. Using a web-browser, end users can schedule point-to-point or multipoint conferences, including recurring events. Via integration with the MXM, conference resource conflicts and participant conflicts can be avoided. Additionally, at the appointed time the MXM initiates the conference, and is able to automatically retry users that are busy or unavailable.

VCON Conference Moderator

Customization, Private Labeling and Integration

VCON offers a set of software development tools (SDK) and application programming interfaces (API), which enable a service provider to do numerous things.

- **Customization and private labeling** - VCON's vPoint Development Kit (vPDK) allows a fully customized desktop application to be developed based on the exact applications that will be provided by the service provider. This development kit has been used by hundreds of application developers and integrators around the world to create custom applications - some of which are centered on videoconferencing and others that simply incorporate interactive or streaming video as a value added feature. See some examples of custom applications below.
- **Integration** - Many of VCON's applications and management tools have APIs for integration with other applications or management systems. Examples include provisioning systems, directories, billing, and status monitoring.

Courtesy of Brinckmann and Associates

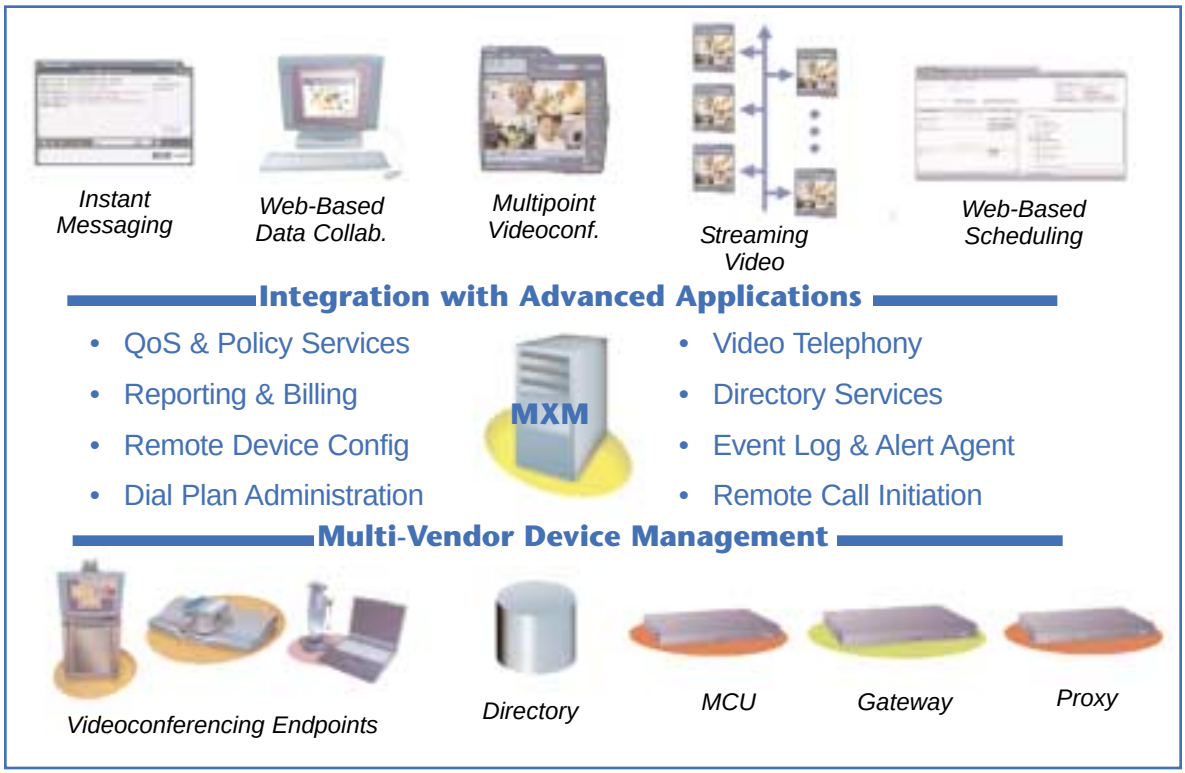
Courtesy of FastWeb

vPDK Custom-Developed Applications

Centralized Management & Administration

In order to deliver a fully integrated, network-centric solution, VCON developed a client/server architecture for IP conferencing applications. At the center of this solution is the VCON Media Xchange Manager (MXM). Introduced in early 2001, the MXM is a suite of integrated client/server applications and services that gives IP-based carriers and service providers the opportunity to truly maximize the revenue-enhancing potential of real-time, interactive rich media conferencing across their growing client base. Using the MXM, service providers will be able to centrally manage, administer, and monitor the deployment all the way from the infrastructure devices installed at the network operation center (NOC) to the endpoint devices and applications installed at the client's location. And end users will have access to functionality and ease-of-use never before available. This new world of IP-based rich media will deliver the ease-of-use and advanced management capabilities that will finally allow for mass deployment by carriers and service providers.

The architecture of the MXM makes it effectively multiple products in one. There are products in the market that just address the management aspect of IP-based conferencing. And there are other products that offer one or more rich media applications. But the MXM integrates virtually all aspects of a rich media conferencing deployment into a single server-based architecture. The diagram below graphically depicts the relationship the MXM has with the various endpoint and infrastructure devices versus the integration it has with advanced conferencing applications.



Firewall Traversal and Encrypted Communications

Firewalls and NAT servers create numerous connectivity challenges for IP-based conferencing applications. And most clients are going to have these network devices installed at the edge of their network. Additionally, there are often requirements to have fully encrypted communications across a public or private network. To address these needs, VCON has the SecureConnect family of products. SecureConnect includes various components for secure firewall traversal and encrypted communications. The ALG Proxy overcomes the connectivity problems associated with firewalls and NAT servers without threatening network security. One key benefit of the ALG Proxy architecture is that external devices never connect directly to the private network and internal devices never connect directly to the public network.

The Advanced Encryption Server offers DES, 3DES or AES encryption of all media streams associated with videoconferences. The Advanced Encryption Server and the ALG Proxy can be configured together for complete firewall traversal and secure communications, all managed and administered via the MXM. For more information about the SecureConnect family of products, see the VCON white paper titled "Traversing Firewalls with Video over IP: Issues and Solutions".

Conclusion

The explosion of rich media conferencing is fundamentally changing the way business is done. Even before IP convergence became the hottest topic in communications delivery, VCON recognized the potential and the opportunity that IP had to offer - and focused much of its development expertise on this area. As such, VCON took the leadership role in developing advanced technology that would enable IP-based rich media conferencing. Leading the industry into the next generation of this revolutionary new communications process, VCON is giving carriers and service providers the power to overcome inhibitors and reap the maximum revenue-producing potential from delivering rich media applications to their client base.

VCON's suite of management and application solutions for rich media conferencing gives service providers most of what they need to exploit the full potential of face-to-face, interactive communication over distances. Today, for the first time, service providers can deploy to users by the many thousands at a very low cost. As a result, clients can now have easy access to exciting new applications that will enhance their productivity and competitive-edge like never before. Plus, the rich media-enabled network can be centrally managed and administered to ensure both high quality and high availability for the clients. In fact, as a result of this advanced functionality and control, VCON fully expects service providers of all types to welcome these new applications into their suite of value-added service offerings.

Appendix: Complete Listing of Conferencing Service Providers

(Provided by Wainhouse Research, 2003)

Conference Service Provider	Web URL	Audio	Web	Video
3D Conferencing, LLC	www.3dconferencing.com	X	X	
Accerra	www.accerra.com		X	
ACCUTEL.com	www.accutel.com	X	X	
ACT Teleconferencing	www.acttel.com	X	X	X
ActiveProject - Framework Technologies	www.activeproject.com		X	
ADCOM Videoconferencing (Canada)	www.adcom.ca			X
Advanced Meeting Solutions Ltd (UK)	www.videomeetings.co.uk			X
Aethra (Europe)	www.aethra.net	X		X
Affinity VideoNet	www.affinityvnet.com			X
America Online, Inc.	www.aol.com		X	
A+ Conferencing	aplusconferencing.com	X	X	X
asnet Technologies Ltd (New Zealand)	www.polycomnz.co.nz			X
AT&T TeleConference Services	www.att.com/virtualmeetings	X	X	X
Avvid Ltd (UK)	avvid-asp.com		X	X
B2B Assist	www.b2bassist.com			X
Bantu, Inc.	corp.bantu.com		X	
Belgacom (Europe)	www.belgacom.be	X		X
Bell Canada	www.bell.ca	X		
BellSouth	www.bellsouth.com	X		X
Bigfoot Conference Call	cc.bigfoot.com	X		
BT Conferencing (Europe)	www.conferencing.bt.com	X	X	X
Budget Conferencing	www.budgetconferencing.com	X		
Call-Fusion (Canada)	www.call-fusion.com	X		
CATA Technologies	www.catatech.com		X	
Centra Software	www.centra.com		X	
Chorus Call	www.choruscall.com	X	X	
Citizens Conferencing	www.citizensconferencing.com	X	X	X
Clarity Conferencing Inc.	www.clarityconferencing.com	X		
Claripoint Ltd.(UK)	www.claripoint.com		X	
CNM Xpress Conferencer	www.xpressconferencer.com	X		
Communicator Inc	www.communicatorinc.com		X	
Communique Conferencing, Inc.	www.ccimeet.com	X	X	
CONF-it (Europe)	www.conf-it.com	X		
Conference Call do Brasil (Brazil)	www.ccall.com.br	X		
Conference Group, The	www.conferencegroup.com	X	X	
Conference Plus, Inc.	www.cpiconf.com	X	X	X
ConferenceCall.com	www.conferencecall.com	X		
ConferenceCallService	www.conferencecallservice.com	X	X	
ConferenceGlobal Videoconferencing	www.conferenceglobal.com			X
Connex International	www.connexintl.com	X	X	X
Connexus	www.connexus-evn.com			X

CXP, Inc. (Korea)	www.cxp.co.kr			X
DataComm Services	datacommservices.com			X
Defero LLC	www.deferollc.com		X	
Deutsche Telekom AG (Europe)	www.telekom.de	X		X
Direct Visual Group Plc (UK)	www.direct-visual.co.uk			X
divine, Inc.	www.divine.com		X	
ECI Conference Call Services	www.calleci.com	X	X	
E-Conference	www.e-conference.com		X	
Eagle Teleconferencing Services	eagleconf.com	X	X	X
eliteVue Inc	www.elitevue.ca			X
Encounter Collaborative	www.e2c.com	X	X	
eRoom Technology, Inc.	www.eroom.com		X	
essengent	www.essengent.com	X	X	
Expedite Video Conferencing Services Inc.	www.expeditevcs.com			X
Express Teleconferencing (Australia)	www.teleconference.com.au	X		
EZcall	www.ezcall.com	X	X	X
Facetoface.net Communications Corporation	www.facetoface.net	X	X	
Forgent Networks	www.forgent.com			X
France Telecom	www.francetelecom.com	X		X
Frontyard Communications (Sweden)	www.frontyard.com			X
Genesys Conferencing	www.genesys.com	X	X	X
Gentner Communications	www.gentner.com	X	X	X
Glance Networks	www.glance.net		X	
Global Crossing Conferencing	www.globalcrossing.com/conferencing	X	X	X
Global VideoCom Group Ltd (UK)	www.globalvc.co.uk			X
Glovicom NV/SA	www.glovicom.com			X
Glyphics Communications, Inc.	www.glyphics.com	X	X	
HelpMeeting	www.helpmeeting.com		X	
HorizonLive	www.horizonlive.com		X	
HQ Global Workplaces	www.hq.com			X
i2i-net Business Centres (UK)	www.i2i-net.co.uk			X
iMeet, Inc.	www.imeet.com		X	
Integrated Data Concepts, Inc. (IDC)	www.teleconnection.com	X		
Intelligent Meetings Corp.	www.inmeetings.com	X	X	X
INS Video Services	www.iowanetworkservices.com/video			X
Integrated Vision (Australia)	www.ivision.com.au			X
InterAct Conferencing	www.interactconferencing.com	X	X	
Interactive Multimedia Artists (IMA)	www.imavideo.com			X
Interactive Solutions, Inc	www.isitn.com			X
Interactive Technologies (IT)	www.interactivetechnologies.com	X		
InterCall	www.intercallinc.com	X	X	
International Video-Conferencing, Inc. (IVCi)	www.ivci.com			X
InterWise	www.interwise.com		X	

InView	www.inview.net	X	X	X
KPN Royal Dutch Telecom (Europe)	www.kpn.com	X		X
KRM Information Services, Inc	www.krm.com	X	X	
Latitude Communications	www.latitude.com	X	X	
LeaderPhone Teleconferencing Services	www.leaderphone.com	X		
Link Conference Service	www.linkconferencecall.com	X	X	
Lotus Software (IBM)	www.lotus.com		X	
Loudeye Corporation	www.loudeye.com		X	
MCSi, Inc.	www.mcsinet.com			X
MeetingOne	www.meetingone.com	X		
MeetingZone (UK)	www.meetingzone.com	X		
MeetU	www.meetu.com		X	
Microsoft MSN Messenger Service	messenger.msn.com		X	
Mshow	www.mshow.com		X	
MVC Teleconferencing GmbH	mvc-tc.com	X		X
NetOnCourse (MI-Live)	www.netoncourse.com		X	
Netspoke, Inc.	www.netspoke.net	X	X	
NetworkIP	www.networkip.net	X		
New Media Solutions (Avitage!)	www.avitage.com		X	
Nexus Conferencing (Australia)	www.nexusconferencing.com.au			X
Novasight (France)	www.novasight.fr			X
NTT Marketing ACT, Inc. (Japan)	web.chorusline.ne.jp	X		
NTT Phoenix Communications (Japan)	www.nttphx.co.jp			X
Obidicut LLC	www.obidicut.net		X	
Odigo Inc.	www.odigo.com		X	
Oklahoma State Univ - Television Services	www.osutv.org			X
One Rate Conferencing	onerateconferencing.com	X		
Opus Digital	www.opusdigital.net			X
PalTalk	www.paltalk.com		X	
Pandora Networks, Inc.	www.pandoranetworks.com		X	
PC-Conferencing, Inc.	www.pc-conferencing.com	X		
Pixion (PictureTalk)	www.pixion.com		X	
PlaceWare	www.placeware.com		X	
Premiere Conferencing	www.premconf.com	X	X	
PresentationPro	www.presentationpro.com		X	
Presenter.com	www.presenter.com		X	
Providea	www.provideasolutions.com			X
PROXIMITY	www.proximity.com			X
Quorum Videoconferencing	quorumvideoconference.com			X
Raindance Communications, Inc.	www.raindance.com		X	
RealCast Corporation	www.realcastlive.net		X	
REALCOM Co., Ltd. (Bangkok, Thailand)	www.realcomth.com			X
SBC (1-800-CONFERENCE)	www.ameritech.com	X	X	X

SDSL Video	www.sdsl-video.com			X
Showcaster / e-Media	www.showcaster.com		X	
SiteScape, Inc.	www.sitescape.com		X	
Smart Meeting (Sweden)	www.smartmeeting.se	X		
Sonera (Scandinavia)	www.sonera.com	X	X	
Sonic Telecom Ltd.	www.sonictelecom.com			X
SpartaCom Technologies, Inc (Linktivity)	www.linktivity.com		X	
SpeakSpace, Inc.	www.speakspace.com	X	X	
Spiderphone	www.spiderphone.com	X	X	
Sprint Collaborative Solutions	www.sprint.com/icc	X	X	X
Summit Conference Service	www.summitconference.com	X	X	
Swiderski Electronics, Inc.	www.swid.com			X
Swisscom AG (Europe)	www.swisscom.ch	X		X
Symetria Switzerland	www.symetria.com			X
Synergy Call (UK)	www.synergycall.co.uk	X	X	X
Talk & Vision (Netherlands)	www.videoconference.nl			X
TalkVISUAL	www.talkvisual.com			X
Team Anywhere - Strategic Net Applications, Inc.	www.teamanywhere.com		X	
Telesoft (Spain)	www.telesoft.es		X	
TeleSuite Corporation	www.telesuite.com			X
Telia SA (Sweden)	www.telia.com	X		X
Telkom South Africa	www.telkom.co.za	X		X
TelSpan, Inc	www.telspan.com	X	X	
Telstra ConferLink (Australia)	telstra.com.au/conferlink	X		X
TELUS (Canada)	tac.telus.com	X		X
Ternion Conferencing LLC	www.ternionconferencing.com	X	X	
TKO Video Communications	www.tkoworks.com	X		X
TM Live (Telekom Malaysia)	www.tmlive.net	X		X
Transtel (South Africa)	www.transtel.co.za	X		
TVFON Corporation	www.tvfon.com			X
VIACK Corporation	www.viack.com		X	
Viasolutions (Belgium)	www.viasolutions.be	X		X
Vidcon Solutions Group, Inc	www.vidconsolutions.com			X
Video Conference Services Ltd (UK)	www.vcs-ltd.com			X
Video Guidance.com	www.videoguidance.com	X		X
Video Meeting Company, The (UK)	www.videomeetingcompany.com	X		X
Videocall Limited (UK)	www.videocall.co.uk		X	X
ViewCentral	www.viewcentral.com		X	
Virtual Design Network	www.virtualdesign.net		X	
VisioWorks (France)	www.visioworks.fr			X
Visual Systems Group Inc. (VSGi)	www.vsgi.com			X
V-SPAN	www.vspan.com	X	X	X

VTC Services, Inc.	www.vtcservices.com			X
Vtron GmbH (Germany)	www.vtron.de			X
VX Distributing (distributors)	www.vxdistributing.com			X
Wavenet Conferencing Ltd (Ireland)	www.wavenet.ie			X
Web Conferencing Central	www.web-conferencing-central.com	X	X	
WebConference.com	www.webconference.com	X	X	
WebDialogs	www.webdialogs.com		X	
WebEx Communications	www.webex.com		X	
Wire One	www.wireone.com			X
WorldCom E-Meetings	www.e-meetings.wcom.com	X	X	X
Worldwide ISDN Ltd (UK)	www.worldwideisdn.com			X
Xplica, Inc.	www.xplica.com		X	
Yahoo! Messenger	messenger.yahoo.com		X	
York Telecom Corp	www.yorktel.com			X

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