The Forrester Wave™: Enterprise Video Platforms And Webcasting, Q1 2015

by Philipp Karcher, February 3, 2015

KEY TAKEAWAYS

On24 Leads In Webcasting, But Kaltura Leads Combined Solutions

Forrester uncovered a market in which Kaltura is separated from the pack as a video portal, and the strongest overall choice for combined video portals and webcasting. On24 is the best pure webcasting solution. Qumu, MediaPlatform, Sonic Foundry, InXpo, and Polycom round out the Leaders for combined solutions. Nasdaq is also a Leader in webcasting.

Video Platforms Are Converging To Meet Enterprisewide Needs

Vendors focus on live presentations with slides (webcasting), video on-demand publishing (portals), or both. Some webcasting and portals vendors target marketers; others address corporate communications and training. However, lines blur as vendors aspire to offer single solutions for comprehensive video publishing and presentation needs.

Multipurpose, Integration-Friendly Platforms Lead

Leaders have flexible deployment models and integrations with Internet content delivery networks (CDNs) and wide area network (WAN) optimization solutions for large-scale video distribution. They integrate with collaboration, portal, customer relationship management (CRM), and other applications to video-enable business processes. Leaders also support rich content creation and playback features to maximize engagement.

Access The Forrester Wave Model For Deeper Insight

Use the detailed Forrester Wave model to view every piece of data used to score participating vendors and create a custom vendor shortlist. Access the report online and download the Excel tool using the link in the right-hand column under "Tools & Templates." Alter Forrester's weightings to tailor the Forrester Wave model to your specifications.

The Forrester Wave™: Enterprise Video Platforms And Webcasting, Q1 2015

Choose From Solutions For Presenting Live Or Publishing Video On Demand To Internal Or External Audiences

by Philipp Karcher
with Stephen Powers, Steven Kesler, and Danielle Geoffroy

WHY READ THIS REPORT

In Forrester's 24-criteria evaluation of enterprise video platform and webcasting vendors, we identified the 16 most significant providers — BrightTalk, Cisco, InXpo, Kaltura, Kontiki, Kulu Valley, MediaPlatform, Nasdaq, On24, Panopto, Polycom, Qumu, Ramp, Sonic Foundry, TalkPoint, and VBrick — in the category and researched, analyzed, and scored them. This report details our findings about how well each vendor fulfills our criteria and where they stand in relation to each other to help organizations select the right video publishing or presentation solution for marketing, corporate communications, and training.

Table Of Contents

Notes & Resources

Forrester conducted product evaluations in September and October 2014, and interviewed 16 vendor and several user companies: BrightTalk, Cisco, InXpo, Kaltura, Kontiki, Kulu Valley, MediaPlatform, Nasdaq, On24, Panopto, Polycom, Qumu, Ramp, Sonic Foundry, TalkPoint, and VBrick.

Related Research Documents

Market Overview: Video Platforms For Digital Media Companies
December 10, 2014

The Forrester Wave™: Video Platforms For The Enterprise, Q1 2013
March 8, 2013

PLATFORMS ARE IMPORTANT AS ENTERPRISES EMBRACE VIDEO

Video is becoming a more common channel that enterprises use to communicate — both internally with other employees and externally with customers and partners. As enterprises look at applications for video across marketing, corporate communications, and training, selecting the right technology platform is an important decision. Forrester defines a video platform as:

> *Software (and optionally appliances) to capture, manage, and deliver one-to-many live and on-demand IP video.*

Video platforms empower application development and delivery (AD&D) pros with tools to set up enterprisewide video publishing services, embed video in business applications, and distribute video efficiently in different network environments. Selecting the right platform allows AD&D pros to maximize their opportunity to apply video communications to achieve organizational objectives and enhance customer and employee experiences.

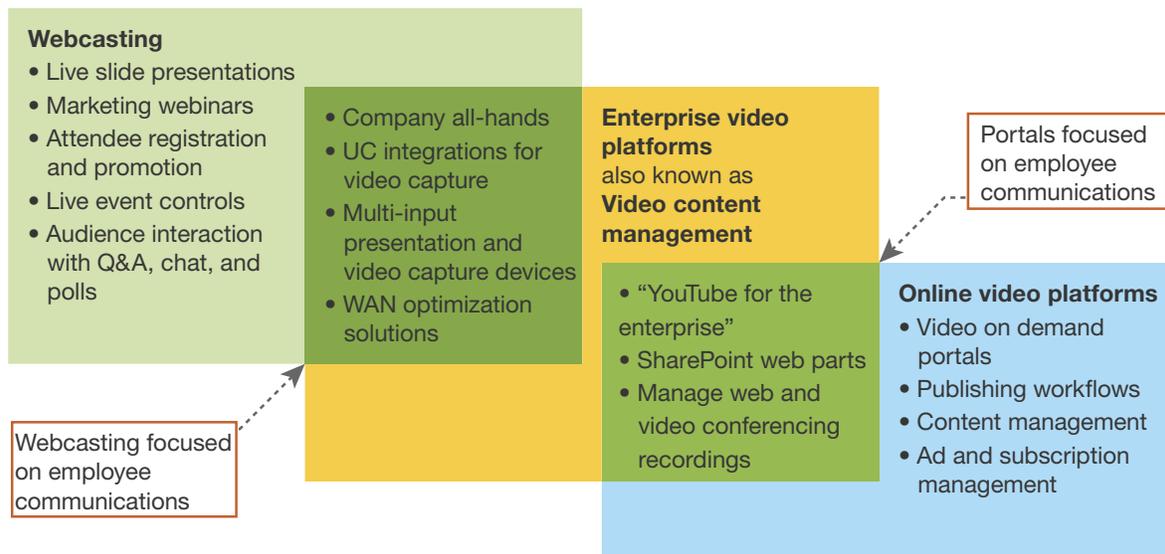### Video Platforms Converge To Meet Enterprisewide Needs

Video platforms split into different categories based on their focus on live presentations with slides (webcasting) or video on-demand publishing (portals). Some vendors focus on solutions for marketing; others focus on corporate communications and training. However, the lines are blurring as vendors seek to become single solutions for comprehensive internal plus external video publishing and presentation needs (see Figure 1):

- **Webcasting vendors are adding portals and enterprise software integrations.** Webcasting vendors like On24 and InXpo have added brandable portals enterprises can use as a home for previous, upcoming, and featured webcasts and other videos. A portal offering makes these vendors more relevant for video on demand and content that didn't originate as a webcast on their solution. By adding integrations with Jive, Yammer, and Salesforce Chatter, they are also branching further into employee communications.

- **Video portal vendors move into webcasting.** Kaltura and Ramp have video on demand solutions for marketing and employee communications, and recently released solutions for live webcasting. Although Kontiki specialized in live video for years, it was missing the interactive presentation and event management capabilities associated with webcasting. Now these vendors have solutions for buyers' whose objective is video for live events, video-enabling the intranet, or both.

- **Enterprise video platforms extend into marketing.** Enterprise video platforms like Qumu and MediaPlatform offer webcasting and video on demand for employee communications. By adding integrations with Eloqua and Marketo and improving their reporting capabilities, they are extending the value of their existing platforms for marketers. Enterprise video platform

vendors in general are focusing more on player and portal branding and design with support for HTML5 and customizable player frameworks — things important to marketers concerned with branding their digital customer experience.

Another category, online video platforms, includes vendors Brightcove and Ooyala. Vendors in this category have solutions for video on-demand for marketing, but have not shown interest in webcasting or video for employee communications in general.[1]

Figure 1 Webcasting And Video Platforms Converging

Webcasting
- Live slide presentations
- Marketing webinars
- Attendee registration and promotion
- Live event controls
- Audience interaction with Q&A, chat, and polls

- Company all-hands
- UC integrations for video capture
- Multi-input presentation and video capture devices
- WAN optimization solutions

Enterprise video platforms
also known as
Video content management

- "YouTube for the enterprise"
- SharePoint web parts
- Manage web and video conferencing recordings

Portals focused on employee communications

Online video platforms
- Video on demand portals
- Publishing workflows
- Content management
- Ad and subscription management

Webcasting focused on employee communications

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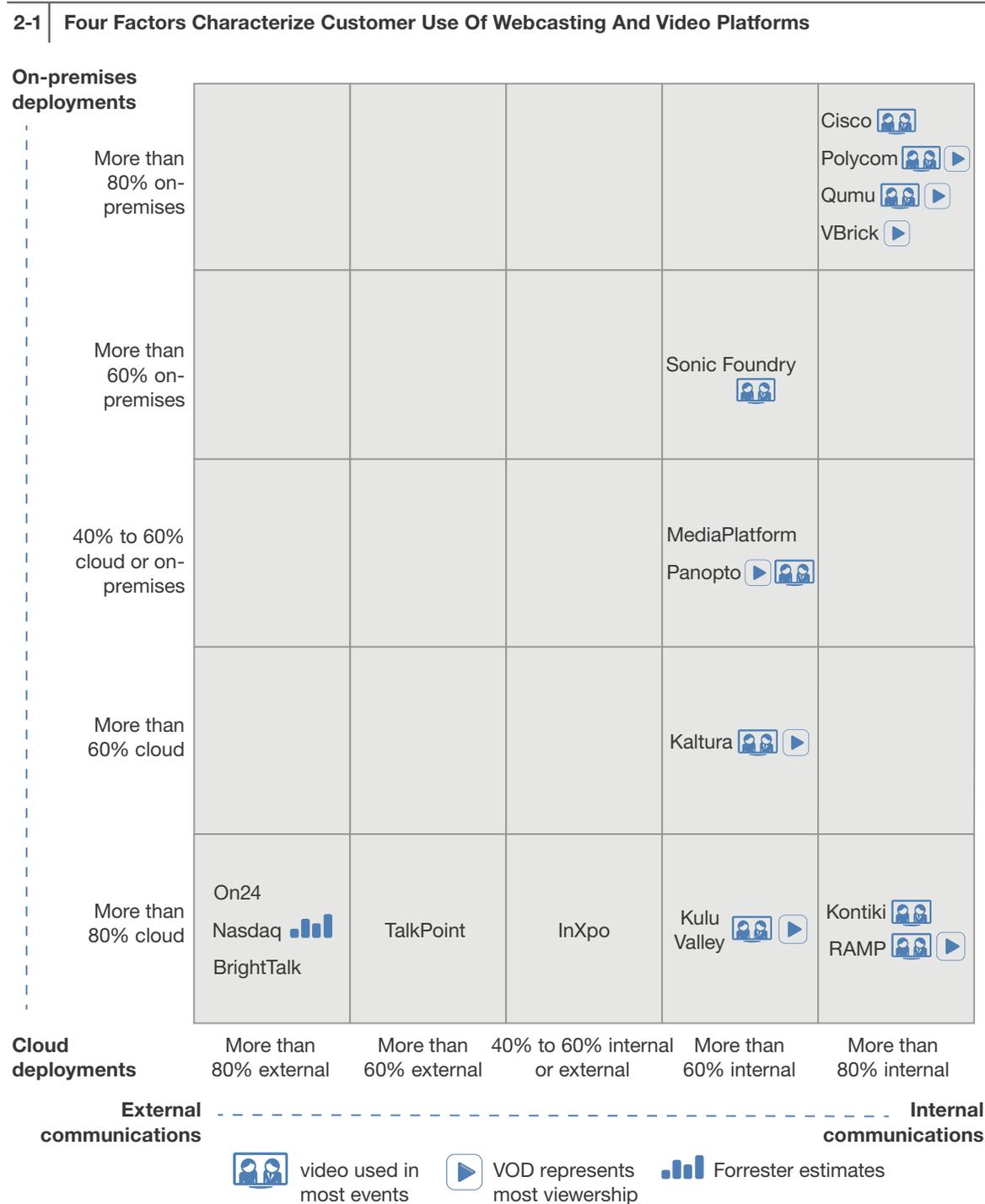
VENDORS FOCUS ON IMPROVING BUSINESS OUTCOMES AND DRIVING ADOPTION

As enterprises shift from experimentation to think strategically about how they should use video, vendors are delivering functionality, integrations, and services that make it easier to apply video to — and understand how it affects — business processes. They also want to drive more pervasive use of video within enterprises. Specifically, video platform vendors are prioritizing:

- **Tools to drive marketing and PR campaign success.** Several vendors have services to notify public communities of upcoming webcasts as well as syndicate recordings to news sites to maximize reach. Some have built-in lead scoring based on attendee engagement during a webcast. Most have added or are building integrations that pass data on video viewing to marketing automation and customer relationship management (CRM) systems to drive targeted customer follow-ups. Vendors are also expanding analytics services that benchmark the effectiveness of webinars within particular industries.

■ **Self-service to maximize adoption.** Until recently the standard model for live webcasting required a project manager from the vendor to operate the platform. Enterprises still use production services for high-profile events, but a training department should be able to conduct a training webcast like they can do using webconferencing using a WebEx or GoToMeeting today. Video platform vendors have introduced wizards to simplify setting up and running live events, including the process of connecting videoconferencing endpoints to their platforms in the cloud.

■ **Browser-based content creation to empower employees.** A European bank found its research reports had a 4x better open rate when accompanied by video of the analyst giving a synopsis of his or her findings. Tools to capture video and create video presentations — using webcams, screen capture, and slides — are increasingly important for all employees to communicate effectively with video. Some vendors only expose this functionality to administrators, but more are making video capture and editing tools easily accessible to all users in the browser.

■ **Cloud offerings to simplify and speed up deployments.** With rapid innovation in online and mobile video formats and in video delivery technologies, enterprises that wait years between major platform updates will frustrate customers and employees with outdated experiences. Forrester is getting more inquiries from clients looking specifically at their options in the cloud for video. Unfortunately some vendors still don't have multitenant cloud offerings. Others, however, are bolstering their cloud infrastructure footprints and security features, and developing hybrid deployment options (see Figure 2).[2]

■ **Scalability over the enterprise WAN and the Internet.** Network bandwidth continues to be the primary technical obstacle to video deployments. Most vendors support global content delivery networks (CDNs) like Akamai, support multicast with Flash over multicast networks, and work with wide area network (WAN) optimization appliances like Riverbed SteelHeads. Some vendors in the Forrester Wave have dedicated appliances to cache video at office locations while others have software-based approaches. Vendors are also improving their support for distribution using multiple methods simultaneously for different audiences.

Figure 2 Four Factors Characterize Customer Use Of Webcasting And Video Platforms

2-1 | Four Factors Characterize Customer Use Of Webcasting And Video Platforms

On-premises deployments	More than 80% external	More than 60% external	40% to 60% internal or external	More than 60% internal	More than 80% internal
More than 80% on-premises					Cisco 👥 Polycom 👥 ▶ Qumu 👥 ▶ VBrick ▶
More than 60% on-premises				Sonic Foundry 👥	
40% to 60% cloud or on-premises				MediaPlatform Panopto ▶ 👥	
More than 60% cloud				Kaltura 👥 ▶	
More than 80% cloud	On24 Nasdaq ▪▪▪ BrightTalk	TalkPoint	InXpo	Kulu Valley 👥 ▶	Kontiki 👥 RAMP 👥 ▶

Cloud deployments

External communications — — — — — — — — — — — — — — — Internal communications

👥 video used in most events   ▶ VOD represents most viewership   ▪▪▪ Forrester estimates

Figure 2 Four Factors Characterize Customer Use Of Webcasting And Video Platforms (Cont.)

2-2 | Four Factors Characterize Customer Use Of Webcasting And Video Platforms
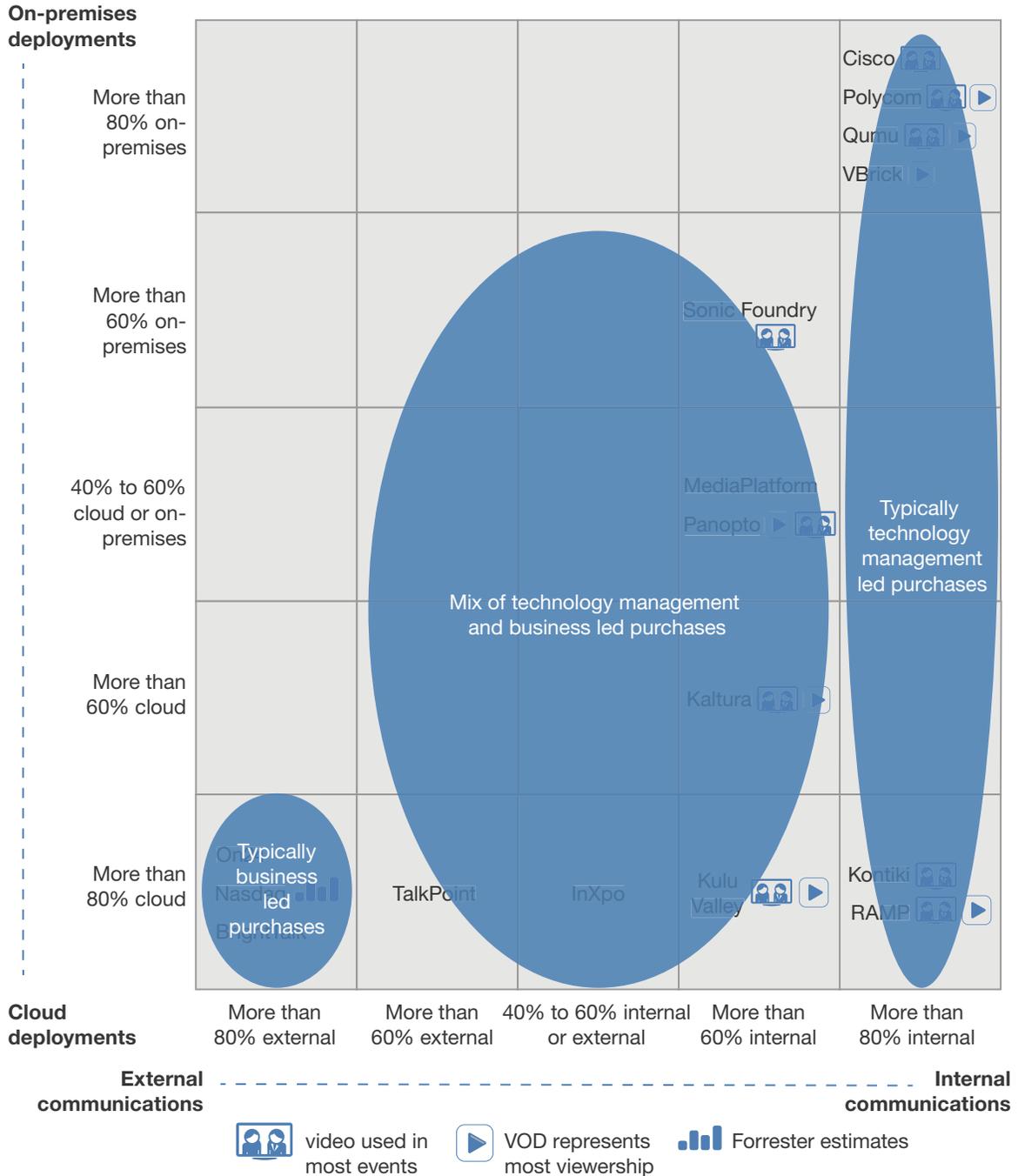
ENTERPRISE VIDEO PLATFORMS & WEBCASTING EVALUATION OVERVIEW

To assess the state of the enterprise video platforms and webcasting market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of top vendors.

Evaluation Criteria: Current Offering, Strategy, And Market Presence

After examining past research, user-need assessments, surveys, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria. We evaluated the vendors' platforms in general availability (GA) as of December 15 using 24 criteria in three groupings:

- **Fifteen criteria assess the current offering.** We looked at deployment models offered, including support for failover and disaster recovery. We evaluated the breadth of services vendors provide to help enterprises with webcasting. And of course we examined product capabilities: support for campaign management; player and interactive features; editing; branding and design; client and device support; options for uploading and encoding; options for video capture; workflow; search; reporting and analytics; administration and security; and internationalization and localization.

- **Seven criteria assess the vendors' strategy.** We counted integrations with enterprise applications since publishing to SharePoint and other social platforms is important to many buyers. We looked at how open vendors are to sharing their application programming interfaces (APIs). We evaluated their CDN strategies for supporting video delivery in different environments. We considered their abilities to support global customers and we looked at their track record in webcasting. We included, but did not score, self-service strategy and cost of ownership, which you can review in the downloadable spreadsheet.[3]

- **Two criteria assess market presence.** We examined the size of the customer base for the platform, as well as its current revenues. Many enterprises favor platforms used by other enterprises or cutting-edge companies, so size and makeup of the customer base is a key criteria.

Included Vendors Have Traction With Enterprise Marketing, Corp Comms, And Training

Forrester evaluated 16 vendors in the assessment: BrightTalk, Cisco, InXpo, Kaltura, Kontiki, Kulu Valley, MediaPlatform, Nasdaq, On24, Panopto, Polycom, Qumu, Ramp, Sonic Foundry, TalkPoint, and VBrick. We did not include Office 365 Video, which Microsoft launched in late November — too late for this evaluation.[4] We chose the vendors we included based on five characteristics (see Figure 3):

- **A focus on enterprise use cases.** Vendors in the evaluation have customers using their products for enterprise marketing, corporate communications, and training.

- **Support for live webcasting.** Vendors in the Forrester Wave support both live and on demand video publishing use cases.

- **Sparked client interest.** Forrester clients express interest in learning more about the evaluated vendors, frequently asking about them within the context of inquiry, advisory, and/or consulting.

- **Revenue of at least $5 million.** Some of the vendors in this evaluation are small, but they have years of experience selling to large enterprises. We kept the revenue cutoff low to recognize the large number of small players in the growing video platforms market.

- **Customer references.** All of the participating vendors provided contact information for at least two customers that agreed to speak to Forrester about their use of the solutions for webcasting and/or video on demand in the enterprise.

Figure 3 Evaluated Vendors: Product Information And Selection Criteria

| | | Evaluated as a solution for: | | |
| | | Webcasting | Portals | Webcasting & portals |
Vendor	**Product**			
BrightTalk	• BrightTalk	✓		
Cisco	• TelePresence Content Server • Show and Share • Media Experience Engine	✓	✓	✓
InXpo	• XPocast • VX Environments	✓	✓	✓
Kaltura	• Kaltura Webcasting • Kaltura MediaSpace • Kaltura Video Platform • Kaltura Video Connector for Jive • Kaltura Video Extension for IBM Connections • Kaltura Video Extension for SharePoint	✓	✓	✓
Kontiki	• Kontiki ECDN version 9.1 • Kontiki MediaCenter version 9.1 • Kontiki Webcaster version 1.2 • Kontiki Video Web Parts for SharePoint 140911 • Kontiki Broadcaster for Lync version 1.1 • Kontiki Stream for Chatter version 1.0	✓	✓	✓
Kulu Valley	• Kulu Platform • Qumu Cloud	✓	✓	✓
MediaPlatform	• PrimeTime • WebCaster	✓	✓	✓
Nasdaq OMX	• Multimedia Centre	✓		
On24	• Webcasting Platform 10 • Webcast Elite	✓		
Panopto	• Panopto	✓	✓	✓
Polycom	• RealPresence Media Manager • RealPresence Capture Server	✓	✓	✓
Qumu	• Video Control Center	✓	✓	✓
Ramp	• Ramp Video Management • Ramp Video Live	✓	✓	✓
Sonic Foundry	• Mediasite Enterprise Video Platform	✓	✓	✓
VBrick	• Rev • VEMS • Distributed Media Engine	✓	✓	✓

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Figure 3 Evaluated Vendors: Product Information And Selection Criteria (Cont.)

Inclusion criteria

A focus on enterprise use cases. Vendors in the evaluation have customers using their products for both live webcasting and video on-demand publishing for enterprise marketing, corporate communications, and training.

Support for live webcasting. Vendors in the Forrester Wave support live and on-demand video publishing use cases.

Sparked client interest. Forrester clients express interest in learning more about the evaluated vendors, frequently asking about them within the context of inquiry, advisory, and/or consulting.

Revenue of at least $5 million. Some of the vendors in this evaluation are small, but they have years of experience selling to large enterprises. We kept the revenue cutoff low to recognize the large number of small players in the growing video platforms market.

Customer references. All of the participating vendors provided contact information for at least two customers that agreed to speak to Forrester about their use of the solutions for webcasting and/or video on demand in the enterprise.

OUR CATEGORY BASED ANALYSIS OF VIDEO PLATFORMS

Our research shows that video platforms are not yet all-in-one solutions. Most products satisfy the needs of one or two use cases. Our evaluation examined the 16 video platform and webcasting providers using the typical requirements we hear from clients looking at each of three categories. We adjusted the weightings for each of the three sets of rankings:

- **For webcasting only, we gave extra weight to campaign management and services.** We find that buyers looking only for live webcasting tend to compare these products to webconferencing for webinars. Therefore we gave extra weight to webcasting services to help enterprises run live events; campaign management features to manage registrations, promotions, and attendee data; and player features to provide attendees a rich, interactive experience (see Figure 4).

- **Portal weighting favored content creation and search.** Clients that ask Forrester about video on-demand portals often describe what they are looking for as "YouTube for the enterprise." We prioritized integrations with enterprise applications like social platforms and SharePoint for intranets. We also prioritized content creation features, workflow, search, and administration and security — things that become more important when the solution is used by many departments or many employees producing and consuming content (see Figure 5).

- **Enterprise video platforms are a combination of both.** This evaluation includes all the criteria. When clients look for a combined solution for webcasting and video portals, however, we find they're looking to deploy an enterprisewide service for multiple use cases, with

many participants contributing content, and with less reliance on services for one-off events. Therefore we reduced the weight on webcasting services and campaign management, and similar to the portal evaluation we increased the weight on administration and security and on search (see Figure 6).

Figure 4 Forrester Wave™: Enterprise Video Platforms For Webcasting, Q1 '15
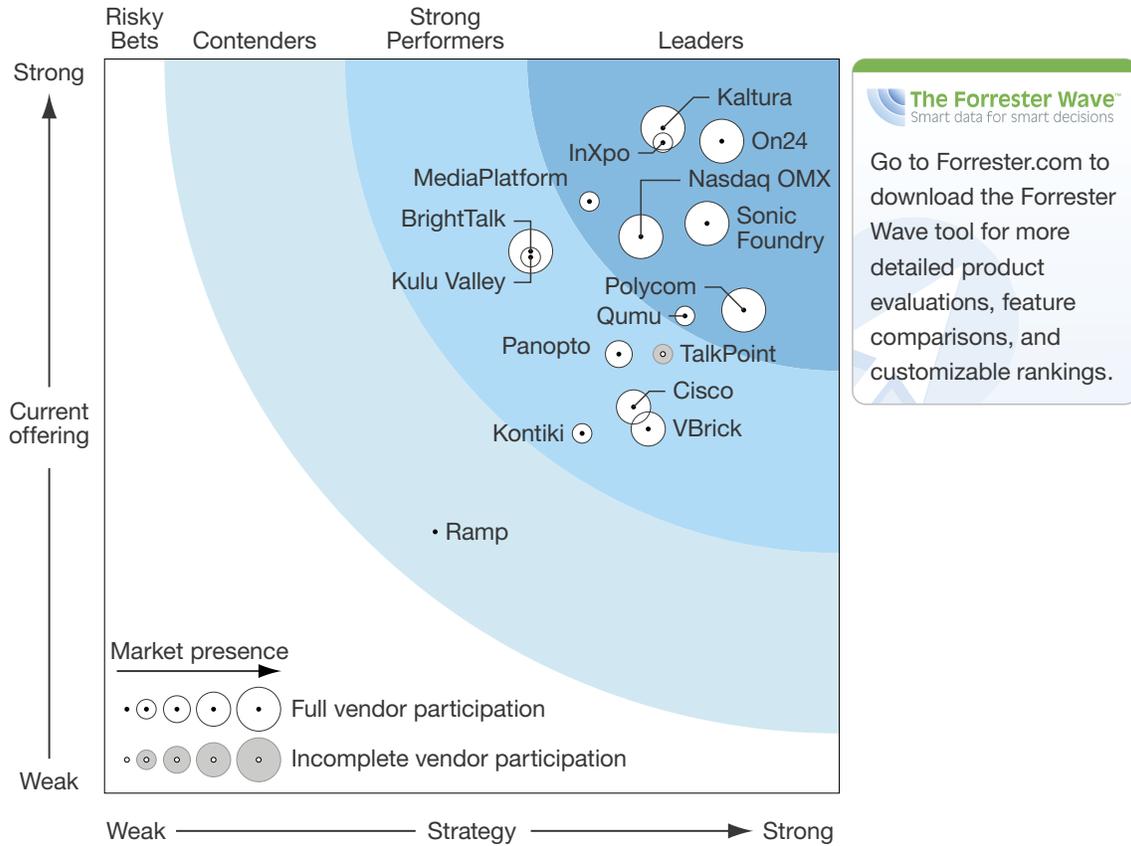
FOR APPLICATION DEVELOPMENT & DELIVERY PROFESSIONALS
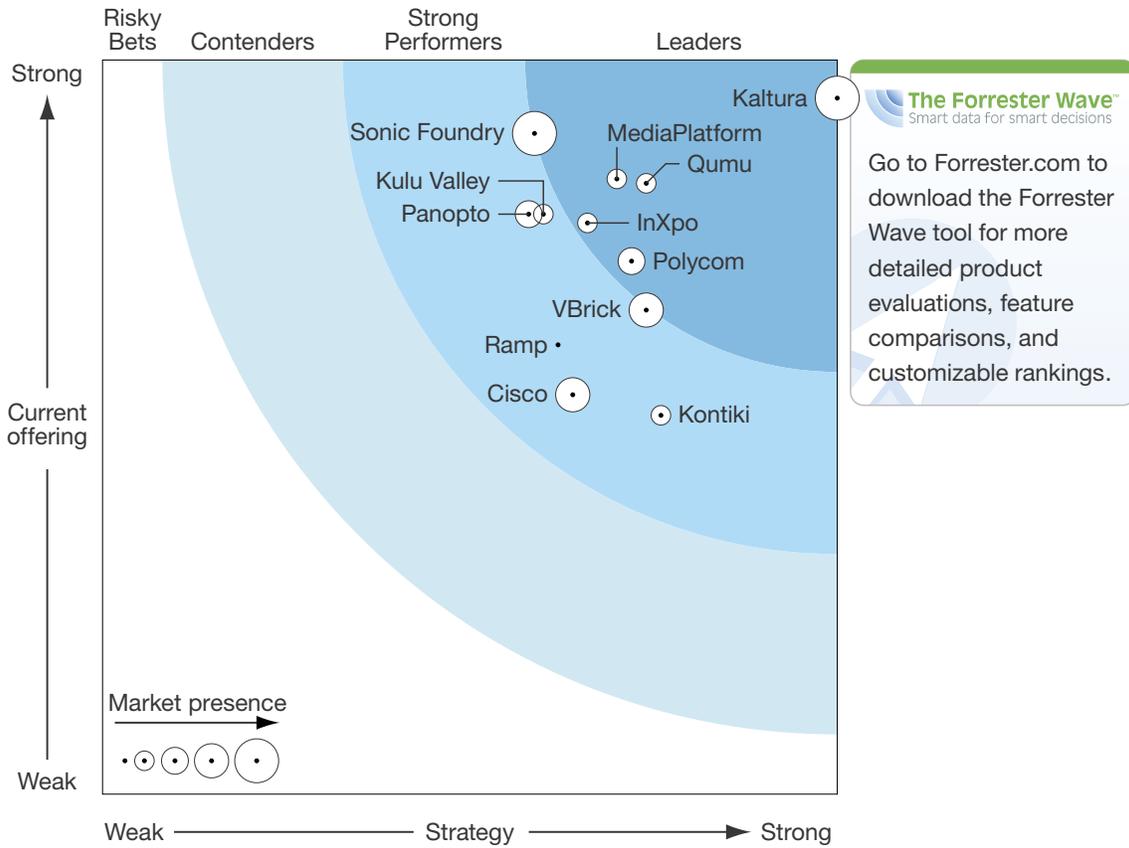The Forrester Wave™: Enterprise Video Platforms And Webcasting, Q1 2015

12

Figure 4 Forrester Wave™: Enterprise Video Platforms For Webcasting, Q1 '15 (Cont.)

	Forrester's Weighting	BrightTalk	Cisco	InXpo	Kaltura	Kontiki	Kulu Valley	MediaPlatform	Nasdaq OMX	On24	Panopto	Polycom	Qumu	Ramp	Sonic Foundry	VBrick
CURRENT OFFERING	50%	3.69	2.63	4.43	4.53	2.45	3.65	4.03	3.79	4.44	2.99	3.29	3.25	1.78	3.88	2.48
Deployment model support	3%	2.00	2.00	4.00	5.00	2.00	5.00	5.00	2.00	2.00	4.00	4.00	4.00	3.00	4.00	5.00
Failover and disaster recovery	3%	4.00	2.00	4.00	5.00	3.00	3.00	4.00	5.00	5.00	5.00	1.00	3.00	4.00	5.00	5.00
Webcasting services	15%	4.00	4.00	5.00	4.00	2.00	4.00	3.00	4.00	5.00	2.00	2.00	3.00	0.00	4.00	2.00
Campaign management	15%	5.00	1.00	5.00	4.00	2.00	3.00	4.00	5.00	5.00	0.00	3.00	0.00	0.00	2.00	0.00
Player and interactive features	12%	5.00	3.00	5.00	5.00	3.00	4.00	5.00	4.00	5.00	4.00	4.00	3.00	2.00	5.00	2.00
Editing	7%	3.00	3.00	4.00	5.00	2.00	3.00	4.00	3.00	4.00	4.00	4.00	4.00	2.00	4.00	3.00
Branding and design	7%	3.00	1.00	5.00	5.00	1.00	5.00	4.00	3.00	4.00	3.00	2.00	5.00	3.00	3.00	1.00
Client and device support	3%	2.00	0.00	3.00	5.00	2.00	5.00	5.00	2.00	3.00	3.00	3.00	5.00	3.00	5.00	3.00
Uploading and encoding	3%	1.00	2.00	4.00	5.00	3.00	4.00	4.00	3.00	4.00	4.00	4.00	4.00	4.00	5.00	4.00
Direct capture options	7%	3.00	5.00	3.00	4.00	2.00	3.00	4.00	2.00	3.00	4.00	4.00	5.00	2.00	5.00	3.00
Support for workflow	3%	5.00	3.00	4.00	5.00	3.00	5.00	4.00	4.00	5.00	4.00	4.00	5.00	4.00	5.00	5.00
Search engine	3%	1.00	4.00	3.00	4.00	2.00	3.00	4.00	3.00	4.00	5.00	4.00	4.00	5.00	5.00	1.00
Reporting and analytics	7%	4.00	2.00	5.00	4.00	4.00	4.00	4.00	4.00	4.00	3.00	4.00	3.00	2.00	4.00	4.00
Administration and security	5%	2.00	3.00	4.00	5.00	4.00	5.00	4.00	4.00	5.00	4.00	4.00	3.00	3.00	5.00	4.00
Internationalization and localization	7%	4.00	3.00	4.00	5.00	3.00	1.00	4.00	5.00	5.00	4.00	4.00	5.00	1.00	2.00	4.00
STRATEGY	50%	2.90	3.60	3.80	3.80	3.25	2.90	3.30	3.65	4.20	3.50	4.35	3.95	2.25	4.10	3.70
Integrations with enterprise applications	10%	0.00	1.00	3.00	5.00	3.00	2.00	4.00	0.00	2.00	0.00	2.00	4.00	3.00	0.00	2.00
API support	15%	5.00	5.00	3.00	5.00	4.00	5.00	3.00	2.00	3.00	5.00	4.00	2.00	4.00	5.00	4.00
CDN strategy	20%	2.00	3.00	4.00	5.00	5.00	4.00	5.00	3.00	4.00	3.00	4.00	5.00	4.00	3.00	5.00
Global support	25%	1.00	5.00	3.00	5.00	3.00	1.00	1.00	5.00	5.00	5.00	5.00	3.00	1.00	5.00	4.00
Cost of ownership	0%	5.00	3.00	5.00	4.00	1.00	4.00	2.00	5.00	5.00	5.00	5.00	1.00	4.00	4.00	2.00
Webcasting track record	30%	5.00	3.00	5.00	1.00	2.00	3.00	4.00	5.00	5.00	3.00	5.00	5.00	1.00	5.00	3.00
MARKET PRESENCE	0%	4.40	3.60	2.00	5.00	1.30	1.70	1.70	5.00	4.30	2.40	4.70	2.00	1.00	4.40	4.00
Revenue	30%	3.00	5.00	2.00	5.00	2.00	1.00	1.00	5.00	5.00	1.00	4.00	2.00	1.00	3.00	4.00
Customers	70%	5.00	3.00	2.00	5.00	1.00	2.00	2.00	5.00	4.00	3.00	5.00	2.00	1.00	5.00	4.00

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

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Figure 5 Forrester Wave™: Enterprise Video Platforms For Portals, Q1 '15
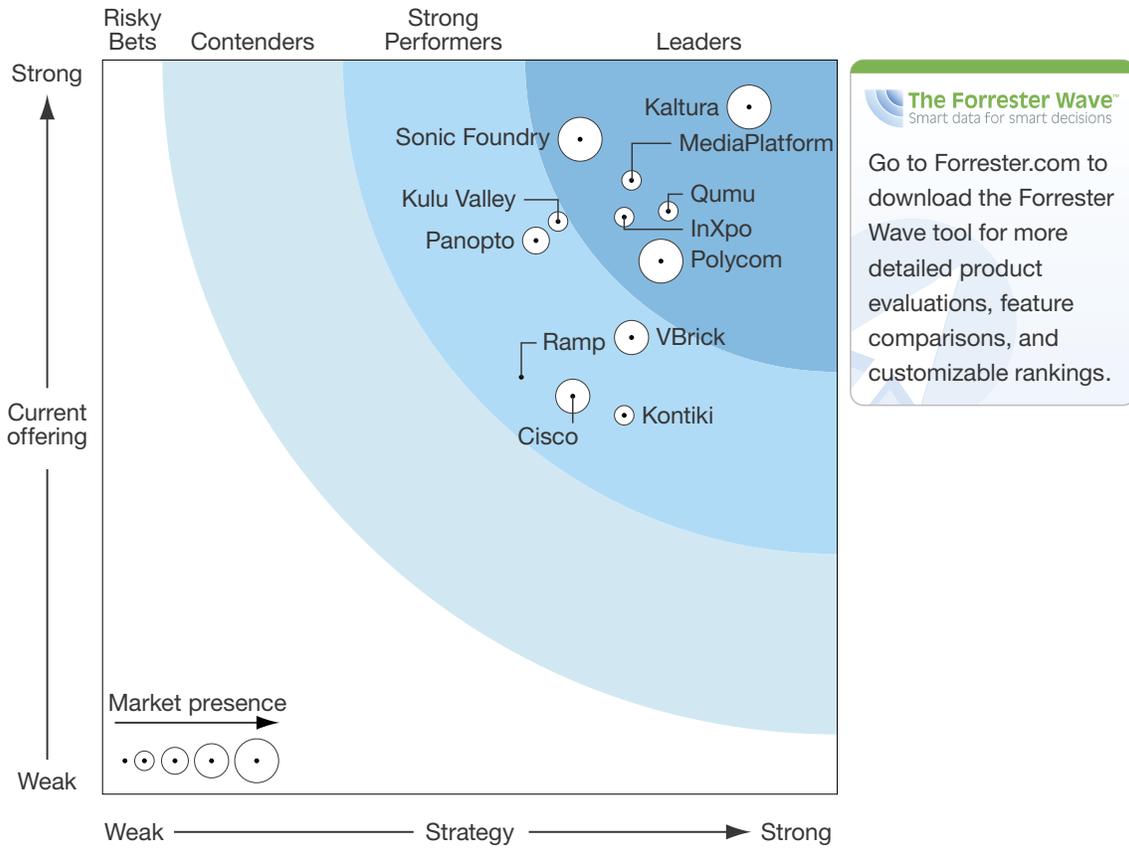
Figure 5 Forrester Wave™: Enterprise Video Platforms For Portals, Q1 '15 (Cont.)

	Forrester's Weighting	Cisco	InXpo	Kaltura	Kontiki	Kulu Valley	MediaPlatform	Panopto	Polycom	Qumu	Ramp	Sonic Foundry	VBrick
CURRENT OFFERING	50%	2.72	3.89	4.74	2.58	3.95	4.19	3.95	3.63	4.16	3.06	4.50	3.31
Deployment model support	7%	2.00	4.00	5.00	2.00	5.00	5.00	4.00	3.00	4.00	3.00	4.00	5.00
Failover and disaster recovery	3%	2.00	4.00	5.00	3.00	3.00	4.00	5.00	1.00	3.00	4.00	5.00	5.00
Webcasting services	0%	4.00	5.00	4.00	2.00	4.00	3.00	2.00	2.00	3.00	0.00	4.00	2.00
Campaign management	0%	1.00	5.00	4.00	2.00	3.00	4.00	0.00	3.00	0.00	0.00	2.00	0.00
Player and interactive features	5%	3.00	5.00	5.00	3.00	4.00	5.00	4.00	4.00	3.00	2.00	5.00	2.00
Editing	9%	3.00	4.00	5.00	2.00	3.00	4.00	4.00	4.00	4.00	2.00	4.00	3.00
Branding and design	7%	1.00	5.00	5.00	1.00	5.00	4.00	3.00	2.00	5.00	3.00	3.00	1.00
Client and device support	7%	0.00	3.00	5.00	2.00	5.00	5.00	3.00	3.00	5.00	3.00	5.00	3.00
Uploading and encoding	9%	2.00	4.00	5.00	3.00	4.00	4.00	4.00	4.00	4.00	4.00	5.00	4.00
Direct capture options	10%	5.00	3.00	4.00	2.00	3.00	4.00	4.00	4.00	5.00	2.00	5.00	3.00
Support for workflow	11%	3.00	4.00	5.00	3.00	5.00	4.00	4.00	4.00	5.00	4.00	5.00	5.00
Search engine	11%	4.00	3.00	4.00	2.00	3.00	4.00	5.00	4.00	4.00	5.00	5.00	1.00
Reporting and analytics	5%	2.00	5.00	4.00	4.00	4.00	4.00	3.00	4.00	3.00	2.00	4.00	4.00
Administration and security	11%	3.00	4.00	5.00	4.00	5.00	4.00	4.00	4.00	3.00	3.00	5.00	4.00
Internationalization and localization	5%	3.00	4.00	5.00	3.00	1.00	4.00	4.00	4.00	5.00	1.00	2.00	4.00
STRATEGY	50%	3.20	3.30	5.00	3.80	3.00	3.50	2.90	3.60	3.70	3.10	2.90	3.70
Integrations with enterprise applications	30%	1.00	3.00	5.00	3.00	2.00	4.00	0.00	2.00	4.00	3.00	0.00	2.00
API support	20%	5.00	3.00	5.00	4.00	5.00	3.00	5.00	4.00	2.00	4.00	5.00	4.00
CDN strategy	30%	3.00	4.00	5.00	5.00	4.00	5.00	3.00	4.00	5.00	4.00	3.00	5.00
Global support	20%	5.00	3.00	5.00	3.00	1.00	1.00	5.00	5.00	3.00	1.00	5.00	4.00
Cost of ownership	0%	3.00	5.00	4.00	1.00	4.00	2.00	5.00	5.00	1.00	4.00	4.00	2.00
Webcasting track record	0%	3.00	5.00	1.00	2.00	3.00	4.00	3.00	5.00	5.00	1.00	5.00	3.00
MARKET PRESENCE	0%	3.60	2.00	5.00	1.30	1.70	1.70	2.40	2.60	2.00	1.00	4.40	4.00
Revenue	30%	5.00	2.00	5.00	2.00	1.00	1.00	1.00	4.00	2.00	1.00	3.00	4.00
Customers	70%	3.00	2.00	5.00	1.00	2.00	2.00	3.00	2.00	2.00	1.00	5.00	4.00

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

Figure 6 Forrester Wave™: Enterprise Video Platforms For Webcasting And Portals, Q1 '15

Figure 6 Forrester Wave™: Enterprise Video Platforms For Webcasting And Portals, Q1 '15 (Cont.)

	Forrester's Weighting	Cisco	InXpo	Kaltura	Kontiki	Kulu Valley	MediaPlatform	Panopto	Polycom	Qumu	Ramp	Sonic Foundry	VBrick
CURRENT OFFERING	50%	2.71	3.93	4.68	2.58	3.90	4.18	3.77	3.63	3.97	2.84	4.46	3.11
Deployment model support	5%	2.00	4.00	5.00	2.00	5.00	5.00	4.00	4.00	4.00	3.00	4.00	5.00
Failover and disaster recovery	3%	2.00	4.00	5.00	3.00	3.00	4.00	5.00	1.00	3.00	4.00	5.00	5.00
Webcasting services	3%	4.00	5.00	4.00	2.00	4.00	3.00	2.00	2.00	3.00	0.00	4.00	2.00
Campaign management	3%	1.00	5.00	4.00	2.00	3.00	4.00	0.00	3.00	0.00	0.00	2.00	0.00
Player and interactive features	7%	3.00	5.00	5.00	3.00	4.00	5.00	4.00	4.00	3.00	2.00	5.00	2.00
Editing	7%	3.00	4.00	5.00	2.00	3.00	4.00	4.00	4.00	4.00	2.00	4.00	3.00
Branding and design	5%	1.00	5.00	5.00	1.00	5.00	4.00	3.00	2.00	5.00	3.00	3.00	1.00
Client and device support	9%	0.00	3.00	5.00	2.00	5.00	5.00	3.00	3.00	5.00	3.00	5.00	3.00
Uploading and encoding	7%	2.00	4.00	5.00	3.00	4.00	4.00	4.00	4.00	4.00	4.00	5.00	4.00
Direct capture options	10%	5.00	3.00	4.00	2.00	3.00	4.00	4.00	4.00	5.00	2.00	5.00	3.00
Support for workflow	9%	3.00	4.00	5.00	3.00	5.00	4.00	4.00	4.00	5.00	4.00	5.00	5.00
Search engine	11%	4.00	3.00	4.00	2.00	3.00	4.00	5.00	4.00	4.00	5.00	5.00	1.00
Reporting and analytics	5%	2.00	5.00	4.00	4.00	4.00	4.00	3.00	4.00	3.00	2.00	4.00	4.00
Administration and security	11%	3.00	4.00	5.00	4.00	5.00	4.00	4.00	4.00	3.00	3.00	5.00	4.00
Internationalization and localization	5%	3.00	4.00	5.00	3.00	1.00	4.00	4.00	4.00	5.00	1.00	2.00	4.00
STRATEGY	50%	3.20	3.55	4.40	3.55	3.10	3.60	2.95	3.80	3.85	2.85	3.25	3.60
Integrations with enterprise applications	25%	1.00	3.00	5.00	3.00	2.00	4.00	0.00	2.00	4.00	3.00	0.00	2.00
API support	20%	5.00	3.00	5.00	4.00	5.00	3.00	5.00	4.00	2.00	4.00	5.00	4.00
CDN strategy	25%	3.00	4.00	5.00	5.00	4.00	5.00	3.00	4.00	5.00	4.00	3.00	5.00
Global support	15%	5.00	3.00	5.00	3.00	1.00	1.00	5.00	5.00	3.00	1.00	5.00	4.00
Cost of ownership	0%	3.00	5.00	4.00	1.00	4.00	2.00	5.00	5.00	1.00	4.00	4.00	2.00
Webcasting track record	15%	3.00	5.00	1.00	2.00	3.00	4.00	3.00	5.00	5.00	1.00	5.00	3.00
MARKET PRESENCE	0%	3.60	2.00	5.00	1.30	1.70	1.70	2.40	4.70	2.00	1.00	4.40	4.00
Revenue	30%	5.00	2.00	5.00	2.00	1.00	1.00	1.00	4.00	2.00	1.00	3.00	4.00
Customers	70%	3.00	2.00	5.00	1.00	2.00	2.00	3.00	5.00	2.00	1.00	5.00	4.00

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

Webcasting Products Need Interactive Player Experiences And Tools To Manage Events

This evaluation includes all the vendors since they all have solutions for webcasting. The evaluation uncovered a market in which:

- **On24, Kaltura, InXpo, Sonic Foundry, Polycom, Nasdaq, MediaPlatform, and Qumu lead.** With the exception of Kaltura, which arrives on the scene with a feature-rich offering, the Leaders have strong track records in this space. They all have interactive and customizable webcasting player experiences. They have robust control platforms to manage webcasts like staged events and tools to edit recordings. With the exception of Polycom and Sonic Foundry, these vendors also have strong campaign management features. On24 and InXpo particularly have comprehensive webcasting services and reporting and analytics.

- **TalkPoint, BrightTalk, Kulu Valley, and Panopto are Strong Performers for webcasting.** Like the Leaders, these vendors also have excellent webcasting player experiences. TalkPoint's differentiator among cloud-based webcasting providers is enabling self-service customers to bring in videoconferencing endpoints. BrightTalk is in a category of its own as a community for B2B professionals and has excellent campaign management features for marketers. Kulu Valley has a strong services offering and a highly brandable and configurable player. Panopto has a broad array of options for video and presentation capture.

- **Cisco, VBrick, and Kontiki are strong performers with simpler webcast offerings.** Cisco Show and Share is worth consideration for live video in Cisco unified communications (UC) environments, but is not very scalable. VBrick can enable large-scale live video distribution through its CDN appliances, but does not have webcasting services, campaign management, or many player features. Kontiki also specializes in enabling live video distribution and recently acquired a webcasting solution. However, it is light on interactive webcasting player features and options for player branding and customization.

- **Ramp is a contender with a barebones webcasting solution.** Ramp enables webcasting within the SharePoint interface without requiring attendees or presenters to open another window or go to a separate portal. It's a viable solution for companies looking for basic enablement in SharePoint, but for buyers looking for best-of-breed capabilities it's missing a lot of the controls, campaign management features, video capture options, and service offerings provided by Leaders.

Portals Have More Options For Content Management And Integration

The portals evaluation excludes BrightTalk, Nasdaq, On24, and TalkPoint since customers choose them for live webcasting, not video on demand. Portal vendors have customers using them purely for video on demand or equally for live and video on demand, including content that does not originate as a live webcast. The evaluation uncovered a market in which:

- **Kaltura clearly differentiates itself as a leader in video portals.** In inquiries, Forrester clients often mention Kaltura as their internal video portal or solution for employee-generated video. Whereas other vendors in this evaluation have focused historically on webcasting, live video distribution, videoconferencing, lecture capture, or search, Kaltura has always focused on portals. Besides being the most feature-rich portal, Kaltura has the most integration with enterprise social, intranet, and collaboration solutions. It is highly flexible in how it can be deployed or customized through APIs.

- **Qumu, MediaPlatform, Sonic Foundry, Polycom and InXpo round out the leaders.** These vendors have excellent features for video content management, uploading and encoding, and workflow. With the exception of InXpo, they support many options for video capture. All of them have good video editing tools. With the exception of Sonic Foundry, they have comprehensive support for CDNs. MediaPlatform and Qumu particularly have strong enterprise social, intranet, and collaboration software integrations.

- **VBrick, Kulu Valley, Panopto, Kontiki, Ramp, and Cisco are Strong Performers.** Due to its heritage, VBrick has comprehensive options for uploading and encoding video files and distributing them through CDNs. Kulu Valley does well with workflow, video portal branding and design, and security. Panopto has comprehensive tools for video creation and editing. Kontiki has excellent CDN support and many enterprise software integrations, Ramp is the best option for SharePoint video, and Cisco has a lot of options for video recording. Panopto, Ramp, and Cisco also have excellent support for in-video search.

Feature-Rich Webcasting And Portals Distinguish Enterprise Video Platforms

Enterprise video platforms have both webcasting and portal applications at least for employee video, with leaders being able to support aspects of both marketing and corporate communications video. The evaluation uncovered a market in which:

- **Kaltura, Qumu, MediaPlatform, Sonic Foundry, InXpo, and Polycom lead the pack.** These vendors have the most complete offerings for organizations that want a multipurpose solution for webcasting and video portals. Each has a wide array of options for capturing video live during a webcast, recording videos for consumption on-demand, and for uploading video files. They have strong client and device support, robust workflow options, and comprehensive administrative and security controls. They also have the most flexible deployment options.

- **Kulu Valley, Panopto, and VBrick are Strong Performers.** Kulu Valley and Panopto have excellent browser-based presentation capture and video recording options, which VBrick does not. Kulu Valley and VBrick have strong portal solutions, which Panopto does not. Individually, Kulu Valley has a strong services offering, Panopto has leading search capabilities, and VBrick best supports large-scale live video distribution on bandwidth-constrained networks. All of them have strong cloud offerings and deployment flexibility in general.

- **Kontiki, Cisco, and Ramp are good for employee communications in specific conditions.** These vendors also are Strong Performers, but have fewer webcasting features in general. Kontiki has made strides in becoming more multipurpose with investments in its portal and its recent acquisition of a webcasting solution, but is primarily for enterprises interested in its software CDN for internal distribution. Cisco has a good portal solution for Cisco telepresence environments, but is the only vendor without a cloud offering. Ramp is the best option for SharePoint environments, but has basic webcasting and content creation features.

This evaluation of the enterprise video platforms and webcasting 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.

VENDOR PROFILES

Below are profiles of each of the included vendors, their platforms, and platform strategies. Vendors are presented in alphabetical order:

- **BrightTalk is in a category of its own with a webcasting community for B2B pros.** Much like YouTube, BrightTalk is more valuable to marketers for its audience than for its video functionality. More than two million B2B pros subscribe to BrightTalk channels with content produced by vendors on topics ranging from desktop virtualization to financial accounting. BrightTalk has plenty of features and services for webcast promotion and lead generation. One tech marketer told us BrightTalk's community is the source for more than 30% of her webinar attendees.

  Since BrightTalk is a public community, it's not an option for employee communications. As a single site for multiple content producers, BrightTalk is also more rigid and less feature-rich than competitors when it comes to branding and design and configuration options in general. Instead BrightTalk's strategy focuses on what it's good at. It plans to draw more attendees and drive more community engagement by introducing networking features — and help marketers optimize their content strategies and campaigns with insights from the community. BrightTalk doesn't have the most technology capabilities in this evaluation, but is worthy of consideration for marketers that want an audience boost with their webcasting platform.

- **Cisco Show and Share is a single-purpose video portal for telepresence recordings.** Cisco's Capture-Transform-Share bundle complements Cisco UC and telepresence deployments with video recording capability, a portal, and speech-to-text transcription for search. The solution is ideal for customers of Cisco telepresence (and optionally Cisco WAAS for network optimization) to easily record and play back videoconference recordings. Besides adding SharePoint web parts for the Show and Share portal and improving API support for its recording server TCS, however, Cisco has not invested much in this platform over the past two years.

The solution conspicuously misses WebEx integration, a road map item for 2015. Show and Share's lack of a cloud option and its high price have hindered adoption by smaller organizations; the lack of support for adaptive bit rate (ABR) and inability to scale beyond 4,000 concurrent viewers has hindered adoption by large enterprises. Customers do use the solution to live stream videoconferences, but not for large-scale interactive webcasting to thousands of users. The Capture-Transform-Share bundle is good for recording and playing back Cisco telepresence, but is limited as an enterprisewide solution for multiple live and on-demand video use cases.

- **InXpo provides webcasting for marketing, corporate communications, and training.** Unlike other providers in this evaluation focused on employee or customer webcasting, InXpo has an equal distribution of clients using it for both. It has integrations with employee social platforms, social marketing sites, and marketing automation applications. It supports both Internet and enterprise CDNs, and can provide a caching server for behind the firewall delivery. Forrester was also impressed with InXpo's tools for attendee engagement scoring for marketers.

  InXpo is not as customizable and brandable as some marketing-focused webcasting solutions. It doesn't have the same degree of enterprise software integrations as corporate-communications-focused vendors. And it doesn't have the same multimedia capture and search features of some training-focused providers. . However, InXpo is a good all-around choice for enterprisewide webcasting and video on demand needs.

- **Kaltura has the most complete set of applications.** Kaltura has distanced itself even further from the pack as a standalone video portal since our last Forrester Wave on video platforms in 2013. Now it has a compelling solution for both live and on demand video with the addition of webcasting and presentation capture. As the only vendor targeting all discrete markets for video platforms — marketing, employee communications, education, and media and entertainment, Kaltura has the most complete solution. By focusing on the high-end needs of media companies Kaltura can provide enterprises with custom workflow, player design, and dashboarding tools typically seen in online video platforms.

  Our only knock on Kaltura in this evaluation is that it is unproven in live webcasting. Before recently releasing its own webcasting module, however, Kaltura already supported integrations with third-party providers to add webcasting functionality to the Kaltura player. With its modular approach, strong support for APIs, and large number of technology integrations, Kaltura is closest to being the one video platform that can do it all.

- **Kontiki differentiates with a P2P CDN for employee video without additional hardware.** Kontiki's cloud-based solution for live video distribution on the WAN uses a software CDN — a background agent installed on employees' desktops to serve as supernodes. Some companies dislike this approach due to security and network and desktop management concerns. Kontiki's

customers tend to be companies with complex network topologies, locations with limited bandwidth, and uninterested in deploying caching servers. With the focus on its CDN as the backbone for video delivery, Kontiki has an impressive set of integrations with Microsoft Lync, SharePoint, Salesforce Chatter, and third-party webcasting providers, including several in this Forrester Wave. Since our last evaluation Kontiki invested more in its own webcasting and portal applications. The redesigned portal has improved mobile support and applicability for public-facing content, through integration with Verizon EdgeCast's CDN.

However, Kontiki is still light on video creation, capture, and editing features. Kontiki has acquired a webcasting product, which is integrated with Kontiki's CDN, but not fully integrated with the portal. It's also lighter on campaign management, player, and branding and design options. Kontiki is a potential fit for companies that need employee webcasting and video portals in complex network environments, but isn't a solution for marketers.

- **Kulu Valley empowers employees to create internal and external video presentations.** Kulu Valley is a small video platform vendor that built a customer base of primarily UK financial services firms through word of mouth. However, those customers use Kulu Valley pervasively for live and on demand employee and customer webcasting. We were impressed that Kulu Valley has multiple examples of financial services customers where employees are using it to create video presentations that they send to their clients. During this evaluation, Qumu acquired Kulu Valley for its content creation features, attractive portal interface, and success selling a cloud-based solution to security-conscious customers.

  Kulu Valley lacks out-of-the box enterprise application integrations, has basic search capabilities, and has a light track record in live webcasting. However, Qumu complements Kulu Valley in these areas. Whereas Qumu has integrations with collaboration applications and video and network infrastructure, Kulu Valley brings integrations with Eloqua, Salesforce, and other CRMs and marketing automation software. Going forward Kulu Valley will integrate with Qumu's edge appliances to video-enable networks for large scale live streaming behind the firewall. Kulu Valley — now rebranded Qumu Cloud — is a strong option for customers that want a cloud-based solution for internal and external video publishing.

- **MediaPlatform manages live video distribution in complex network environments.** Customers use MediaPlatform to set up rules for distributing video in different bitrates and formats over different types of delivery infrastructure (e.g., multicast, Internet, and enterprise CDNs) to multiple locations — simultaneously and with options for failover. MediaPlatform has video portal and webcasting products, but customers use it more for webcasting than for video on demand, given its specialty in live delivery. MediaPlatform also has a strong integration strategy with support for enterprise collaboration applications (Cisco TCS, Jive, SharePoint, Yammer) and CRM and marketing automation systems.

MediaPlatform needs to improve the integration between its two products for webcasting and portals to provide a more consistent experience between them. Whereas the portal is modern, the webcasting player lacks the modular configuration and responsive design we see in other products. One customer also complained that they have to contact support more often than they'd like to change settings they should be able to adjust on their own. MediaPlatform is a potential fit primarily for live webcasting and for video on demand for employees.

- **Nasdaq has workflow and services for IR and PR webcasting.** Nasdaq acquired Thomson Reuters' multimedia solutions unit in 2013, solidifying its market share lead in investor relations (IR) and PR webcasting. Nasdaq has brand cachet and specific know-how of interest to IR pros with tools to notify the financial community and press of upcoming events as well as syndicate webcasts to Thomson Reuters StreetEvents and other financial portals. Nasdaq also has a service to analyze whether webcasts are attracting key industry influencers. Customers like working with Nasdaq's services organization and its ability to support events globally. This also includes support for things like live translation for multilingual webcasts.

  A weakness, however, is that more tasks (in comparison to other products in this evaluation) like portal configuration and video signal acquisition require intervention by Nasdaq staff. Nasdaq has self-service functionality, but due to the high profile nature of IR and PR events, its engagements tend to be services-led. Nasdaq is a potential fit primarily for full-service investor relations and PR webcasts, and secondarily for other large company events.

- **On24 has the best webcasting technology for marketers.** On24 is largest pure play webcasting provider, based on reported revenues. It focuses on the needs of marketers for demand generation: more than 80% of events on its platform are customer facing. This focus shines through in the webcasting experience for attendees with flexibility to brand and skin the player and to customize it with widgets for additional functionality and integrations. On24's focus on marketers is also evident in its support for data — its tools for scoring attendee engagement; its integrations with Marketo, Eloqua, and Salesforce to pass attendee data; and a new service to benchmark webinar effectiveness.

  On24 has focused in recent years on enhancing the self-service version of its platform. But some tasks — like videoconferencing signal acquisition, for example — still require help from On24 staff. Until now On24 has been a departmental buy, not an enterprisewide service. However, On24's widgets to integrate the player with Chatter, Yammer, Jive, and Socialcast activity streams, and a new portal product should help it extend more into internal training and corporate communications. On24 is still a potential fit for companies that need a platform for marketing webinars, but less so for those who desire a single platform for live and on demand internal and external video publishing.

■ **Panopto innovates in rich presentation capture and the playback experience for training.**
Panopto has a software client for video and presentation capture that can be installed on one or
multiple devices — laptops, desktops, tablets — to capture multiple inputs (USB cameras placed
at different locations, for example) and synchronize the feeds in the cloud. This software client
approach lets enterprises provision more employees and enable more rooms for webcasting
than they could with dedicated hardware — and at higher video quality and better performance
than using webcasting in a browser alone. Panopto also has excellent search, automatically
transcribing audio so videos can be navigated by spoken word.

Building on its history working with universities, Panopto has large enterprise customers using
the platform for training. Like a learning management system (LMS), however, Panopto has
more of a folder structure than a portal. Panopto does integrate with SharePoint today. Unlike
other employee-focused video platforms, Panopto also doesn't have a strong focus on network
optimizations for behind the firewall delivery. Panopto is a potential fit for those who want
webcasting and video on demand when network bandwidth constraints aren't the primary
concern and when the videos will be embedded in other portals or sites.

■ **Polycom is a solid choice for those already using its videoconferencing product.**
Polycom provides customers two options to complement their investment in Polycom for
videoconferencing: its recording and streaming server, and optionally Media Manager, which
adds more portal, content management, and webcasting capabilities. Polycom mostly sells
the recording and streaming server alone and recommends Media Manager for customers
producing 25 or more hours of video a month. Since our last evaluation Polycom refreshed its
capture and server hardware, improved Microsoft Lync and SharePoint integrations, added
audio transcription (through partnership with Ramp), and simplified licensing.

However, the platform is still missing key capabilities holding back broader adoption. Content
management and administration are done in a separately installed application — not the
browser. Editing capabilities require another application and are only available to admins.
Polycom also does not have a multitenant cloud offering. Polycom is best fit for existing or
prospective Polycom videoconferencing customers.

■ **Qumu leads with edge devices for large-scale employee video distribution.** Qumu has fewer
customers than some of the other long-established vendors in this evaluation. However, those
customers tend to be Fortune 500s leveraging Qumu pervasively across their enterprise. Many
Qumu customers we've spoken with selected Qumu specifically for its network appliances
to enable live video distribution internally. Qumu has feature-rich portal and webcasting
applications, and a comprehensive set of integrations with enterprise collaboration and
videoconferencing products. Qumu also has robust mobile browser and app support, including
support for mobile device management (MDM).

February 3, 2015

With its focus on network appliances and breadth of integrations, Qumu has the largest average deal sizes we've seen among vendors in this evaluation. However, this business model hasn't been the most conducive to software-as-a-service (SaaS). Until now, Qumu has been overkill for companies with basic needs. Customers have also complained to Forrester about the difficulty in managing Qumu's edge devices, its lack of open APIs, and the need for professional services. During this evaluation Qumu acquired Kulu Valley to serve as its cloud solution. This gives Qumu an easier entry point for customers and an opportunity to play in marketing webcasting.

■ **Ramp has innovative search and the best integration with SharePoint.** Ramp has applied its expertise in search, natural language processing, and speech-to-text transcription to its video platform. The result is an interactive video player that exposes a transcript viewers can click on to jump to different parts of a video.[5] Ramp's strategy for enterprises is to integrate with different content management systems, SharePoint being the first. Ramp for SharePoint has a lot more functionality than Office 365 video including the ability to embed Ramp's interactive video player outside SharePoint, and a newly released live webcasting feature.

Among the vendors evaluated, only Ramp has an integration where a customer can live entirely in SharePoint without having to access other functionality through an outside portal or management console. However, this has two downsides. First, Ramp has less functionality overall than over video platforms (which only provide a subset of their functionality for SharePoint). For example, there are limited options for content creation and only basic controls for webcasting. Second, by living in SharePoint, Ramp is unable to serve as a video platform for enterprisewide needs. It is not applicable to marketing. Ramp is a potential fit for customers who are set on a solution that will live in SharePoint.

■ **Sonic Foundry has extended from webcasting and presentation capture to portals.** Sonic Foundry has devices for multi-input video and presentation capture, and a great webcasting player with in-video search and the ability to show multiple camera feeds at once. Sonic Foundry has expanded its focus on enterprises (beyond its traditional focus on universities) in several ways. It invested in its portal and content management capabilities, including desktop content creation tools and the ability to ingest webconferencing recordings. Sonic Foundry has prioritized its cloud offering, which now offers videoconferencing signal acquisition, not yet available in the on premises version. It has also shifted to restful APIs and has committed to building APIs first since our last evaluation.

While Sonic Foundry is focusing more on enterprise needs, there are still some gaps. Sonic Foundry doesn't have a CDN product (like a caching server) or features to help manage distribution behind the firewall. Sonic Foundry also lacks integrations with enterprise software like SharePoint. Sonic Foundry is a potential fit for enterprisewide needs without significant integration or customization requirements.

- **TalkPoint has self-service webcasting that simplifies videoconferencing connections.** Customers choose TalkPoint for its self-service wizard for live webcasting, which includes the ability to connect videoconferencing endpoints. This is a key differentiator against other cloud-based webcasting providers. Unlike some vendors that maintain separate products for self-service and full service (available only to vendors and their partners), TalkPoint has a single platform. This means customers are less likely to run into issues where they need to call the vendor for help. The strength of TalkPoint's platform is evidenced by several partners choosing to white label TalkPoint for their own webcasting offerings.[6]

  TalkPoint is missing features important to internal communications. It lacks network optimization options and a portal with content management and search. It integrates with videoconferencing, but is light on content creation tools. TalkPoint initially declined to participate in this evaluation since it was in the process of being acquired by PGi, the global conferencing software and services company. For now, TalkPoint — now rebranded iMeet Live based on PGi's webconferencing product — is focused on enhancing its audio and videoconferencing integrations.

- **VBrick's revamped platform and edge devices solve large-scale live employee video.** With its pedigree in video encoding, customers continue to pick VBrick specifically for its network appliances to enable large-scale multicast video distribution. VBrick also has a strong UC integration strategy with excellent support for Cisco telepresence and Microsoft Lync. Since our last evaluation, VBrick has released a new version of its platform that serves as a consistent offering for deployments on premises and in the cloud. The new portal has a modern look and feel. VBrick's strategy is to deliver a solution that could start to serve both employee and marketing use cases.

  However, the platform is light on webcasting and content creation options. For example, webcasting does not support moderated Q&A or multiple presenters. These features are table stakes in marketing webcasting, but are important to corporate communications and training too. There also aren't any browser based video capture, screencast, or editing tools at the moment. VBrick can meet needs for large-scale live video distribution to employees but not for companies with a strategy for employee generated content or marketing webcasting.

SUPPLEMENTAL MATERIAL

Online Resource

The online versions of Figures 4, 5, and 6 are Excel-based vendor comparison tools that provide 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 survey/questionnaire.** 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 [X] 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.

Integrity Policy

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

ENDNOTES

[1] Rather than focus on enterprise video publishing needs, they are focusing more on the needs of media companies to monetize video with advertising and subscriptions. Therefore we did not include them in this evaluation. See the upcoming Forrester report focusing on video platforms for sales and marketing and see the December 10, 2014, "Market Overview: Video Platforms For Digital Media Companies" report.

[2] For example, VBrick is enabling customers to put content and applications in the cloud, but use its edge devices on premises for network optimization. Panopto is providing unified management over content stored on premises and in the cloud.

[3] For self-service strategy we looked at what proportion of vendors' install bases are using self-service vs. full-service webcasting. We did not score it since some vendors have new solutions in this space

[4] At this point Office 365 video is missing some key features — notably the ability to embed the video player outside of SharePoint. It also doesn't have options for content creation and video editing or support for live streaming. Forrester considers it a viable option for customers using SharePoint Online in Office 365 that want a basic video portal. There's no question, however, that Microsoft will be an important player to watch in this space as it iterates on v1 of its solution.

[5] Whereas other products in this evaluation allow you to search for words in the video, Ramp is the only one that displays the full transcript.

[6] We didn't include another vendor's white-labeled version of TalkPoint's platform in this Forrester Wave evaluation.

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