

The Video Tsunami Is Coming

Will Your Company Be Ready to Catch the Wave?

... OR ...

Be Buried by the Sea of Change?



100 HillRock LLC

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This Industry White Paper details a hitchhiker's strategic guide inside and through this perfect storm along with a pocket diary depicting a pragmatic path to allow industry wide commercialization and M&A to proceed until the wave arrives.

The phrase *perfect storm* refers to the simultaneous occurrence of three events which, taken individually, would be far less powerful than the result of their chance combination. Such occurrences are rare by their very nature, so that even a slight change in any one event contributing to the perfect storm would lessen its overall impact. In this case we have the spectacular combination of content, distribution network, and pervasive creation and access devices coming together in form and fashion to allow the true emergence of video to the commercial enterprise. You've witnessed similar mass appeal consumer applications like instant messaging (and its little brother text messaging) become viral, real time business applications. Sure, these little instant communication tools sparked commercial technology transfer and whala - the always connected "are you there" real time collaboration platforms were borne with full enterprise acceptability as MUST HAVE business applications. Video, shackled by years of technology, distribution, picture clarity and cost barriers is about to reach the perfect storm generating mass consumer appeal. Will your company be ready to catch this digital video wave or be buried in the aftermath of this impending Tsunami?

Many current video thought leaders today will not be the ultimate "video" winners of tomorrow. The new video "Google" is taking shape and its appearance is at the edge of the horizon. The new digital age will generate problems and opportunities for content creation, distribution, and access devices never witnessed prior to this *perfect storm*.

Read how the Internet and consumerization, the act of bringing new products to the consumer marketplace prior to industry and enterprise adoption, will foreshadow and accelerate inevitable business change.

Target Audience: Investment Bankers, Hedge Fund Managers, Financial Institutions, C Level Corporate Executives, Business Development, Strategic Company Direction, Technologists, Content Creators, Content Aggregators, Content Providers, Network Distribution, Networking Companies, QoS and QoE Equipment Providers, IPTV, ITV, Media Cache Farms, Network Groomers, Packet and Performance Optimization, Network Management, Access Device Manufacturers, LCD Manufacturers, Camcorders, Video Conferencing Equipment Providers, Telepresence Solution Providers, Video Search Engines, Video Gaming, Video Collaboration, Real Time Collaboration, Instant Messaging.

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About The Authors

Ken Kalinoski

Founder of 100 Hill Rock Technology, Ken has been providing Technology Due Diligence, Strategic Development, Technology Transfer and Interim Management to small and medium size Companies, Capital Investment Bankers and Hedge Fund Managers seeking to expand their products and services. The company often works with private and public companies as well as universities looking for help in the commercialization of research and innovations. Ken's video experience dates back to the first Video on Demand trial with Hong Kong Telecom in the early 1990's. Video has been a passion and focus ever since.

Ken has held executive positions in R&D, Executive Management, Business and Development at a number of Fortune 500 and Startup companies.

Ken mostly served as VP of Engineering at Polycom where he delivered the company's first High-Definition Video Conferencing systems.

He was Startup Company Founder and Vice President of Hardware and Software Engineering for Netpliance. A company IPO'd in 12 months and delivered 1st Mover Internet Appliance product and service offering in 9 months. The company was acquired by 3Com.

Ken's Video Conferencing background includes CTO at VTEL/Forgent Networks where he led the \$100M patent portfolio strategy and M&A and drove the strategy and direction to create the first heterogeneous Video Network Management Platform. The business was later sold to Tandberg.

Ken had numerous assignments in his 18 year career at IBM including HQ assignments and delivery of IBM's first High Availability Cluster Multi-Processor (HACMP) Fault Tolerant System and IBM's Media Streamer Digital Video Broadcasting, Video on Demand and Streaming Audio and Video over the Internet systems.

Ken holds a BS degree in Computer Science and a MS degree in Computer Engineering

Kirk Norsworthy

A veteran of nearly 30 years in technology, Kirk mostly recently served as VP of Engineering at Polycom where he worked with Ken in delivering the company's first High-Definition Video Conferencing systems and was responsible for the Program Management, Product Test, Project Office and Customer Support.

Prior to Polycom, Kirk worked as an executive at startup ClearCube Technology, the leader in PC blade servers. He managed the Architecture and R&D teams and all the off-shore development,

Kirk worked with Ken at VTEL/Forgent Networks in delivering the leading Video Network Management platform. The Alliance Suite was awarded the Lotus Advisor Magazine's - Editor's Silver Choice Award for Business Application and the prestigious award from Frost & Sullivan, The Market Engineering Award for Technology Innovation, recognizing the successful development and introduction of a new technology that makes a significant contribution to the engineering industry.

At Vignette, Kirk was responsible for all the development of Vignette's flagship StoryServer Version 5 and the follow-on V/5 Platform – the leading content management software platform supporting customers such as Bank One/Chase, Barclays, CBS and other high volume websites. He directed the Internationalization of the product, new User Interface and product integration and testing on both NT and Solaris server platforms

Kirk spent 21 years at IBM, where he held numerous R&D, Planning and Project Office assignments in RS6000, PC and Power PC hardware and software. He delivered AIX as the Program Manager and spent several years providing technical assessments and product reviews for IBM Corporate HQ.

Kirk holds a MS in Computer Science and a BS in Journalism.

Appendix A: Companies Named in Document

Alcatel-Lucent. www.alcatel-lucent.com
Amazon. www.amazon.com
American Broadcast Corp. www.abc.com
AMD. www.amd.com
Akamai. www.akamai.com
America Online. www.aol.com
Apple. www.apple.com
AT&T. www.att.com
Audio Visual Integration. www.avi.com
AVID. www.avid.com
Babelgum. www.babelgum.com
Bit Gravity. www.bitgravity.com
Bit Torrent. www.bittorrent.com
Blue Coat. www.bluecoat.com
Brix Networks. www.brixnet.com
Broadcom. www.broadcom.com
Cachelogic. www.cachelogic.com
Catapult Communications. www.catapult.com
CBS. www.cbs.com
Charter Communications. www.charter.com
Cisco Systems. www.cisco.com
Coca Cola Company. www.coca-cola.com
Codian. www.codian.com
Comcast. www.comcast.com
Compete Inc. www.compete.com
Corning. www.corning.com
Cox Communications. www.cox.com
Creative Technology. www.creative.com
Dan Rayburn Online. www.danrayburn.com
DirecTV. www.directv.com
Disney Company. www.disney.com
EchoStar Communications. www.echostar.com
Facebook. www.facebook.com
Gartner Research. www.gartner.com
Geico. www.geico.com
Google. www.google.com
Hewlett Packard. www.hp.com
Hong Kong Telecom. www.pccw.com
Hughes Network. www.hughes.com
IBM. www.ibm.com
IneoQuest. www.ineoquest.com
Inktomi. www.inktomi.com
Intel. www.intel.com
Internap. www.internap.com

Interworking Labs. www.iwl.com
JDSU. www.jdsu.com
Joost. www.joost.com
Juniper Networks. www.juniper.net
Kazaa. www.kazaa.com
KVH. www.kvh.com
LifeSize Communications. www.lifesize.com
Limelight Networks. www.limelightnetworks.com
Limewire. www.limewire.com
Media Publisher. www.mediapublisher.com
MGM. www.mgm.com
Microsoft. www.microsoft.com
Microvision. www.microvision.com
MobiTV. www.mobitv.com
Mozilla. www.mozilla.com
MySpace. www.myspace.com
M2Z Networks. www.m2znetworks.com
NBC Universal. www.nbcuni.com
News Corp/Fox. www.newscorp.com
Nike. www.nike.com
Paramount Pictures. www.paramount.com
Packet Design. www.packetdesign.com
Packet Storm Communications. www.packetstorm.com
Phillips Electronics. www.phillips.com
Pixelmetrics. www.pixelmetrics.com
Polycom Communications. www.polycom.com
Psytechnics. www.psytechnics.com
Qwest Communications. www.qwest.com
Ripcode. www.ripcode.com
Sanjole. www.sanjole.com
Scientific Atlanta. www.scientificatlanta.com
SGI. www.sgi.com
Siemens. www.siemens.com
Skype. www.skype.com
Swing Media. www.slingmedia.com
Sony Pictures. www.sonypictures.com
Sprint Communications. www.sprint.com
SPL Integrated Solutions. www.spl.com
Symmetricom. www.symmetricom.com
Tandberg. www.tandberg.com
Tektronix. www.tektronix.com
Telchemy. www.telchemy.com
Texas Instruments. www.ti.com
Time Warner Communications. www.timewarner.com
Tollgrade Communications. www.tollgrade.com
Twango. www.twango.com
VeriSign Communications. www.verizon.com
Viacom. www.viacom.com

Vialta. www.vialta.com
VSGI. www.vsgi.com
Volicon. www.volicon.com
Warner Brothers. www.warnerbrothers.com
XstreamHD. www.xstreamHD.com
Yahoo. www.yahoo.com
YouTube. www.YouTube.com
Zebra Imaging. www.zebraimaging.com
3Com/Huawei. www.3com.com