



The WebRTC Ecosystem

A Comprehensive Segmented Analysis and a Directory of WebRTC Vendor Product and Service Offerings

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Executive Summary

The speed at which our ability to communicate has advanced is staggering. Since we began to transmit audio across telephone lines 140 years ago, we have seen tremendous changes in how we work and manage relationships. During this time, massively scaled hardware implementations and a succession of software developments have contributed to the rise and fall of industries and companies. Future generations may not recall the many stages by which our modern communications infrastructure came to be, but they will no doubt acknowledge that our era was one of upheaval and change in how we interact across distances.

In this arc of change, the internet and the web browsers that point users to each other have become a primary hub of interaction. Still, desk phones, mobile phones, audio and videoconferencing tools, and an array of backend devices enable essential, if disjointed, communication lines between our work, retail, and social counterparts. When Google introduced WebRTC (real-time communication) software tools in 2011, many communication technology companies began to explore the possibility of linking all of these communication tools through web browsers. Today, the WebRTC toolkit is like a toddler starting to run¹, and as it matures, it is already beginning to influence and shape how we communicate and interact.

The WebRTC Ecosystem

WebRTC is part of a new wave of communications capabilities that unleashes the collective powers of the Internet and the creativity of millions of app developers by removing the barriers to entry, including the need for massive hardware and physical delivery systems, previously enjoyed only by large companies and nationalistic communications monopolies. Anyone with some coding background can now create complex and useful communications, collaboration, and data-rich applications, and these can be developed in a matter of hours or days. To enable this capability, a dynamic ecosystem of companies - both established and very new - is emerging that offers WebRTC-enabled products and services ranging from open source code that developers can freely reuse, to SDKs and APIs, and all the way up to complete, ready-to-deploy standalone systems for voice, video, and web collaboration based on WebRTC. This document, based on expert analysis and ultra-current information, provides a navigational tool for investors, end users, competitors, and developers who want to see the entire ecosystem of WebRTC enablers all in one place.

The document features a framework from which to analyze and categorize the WebRTC ecosystem, along with segmented analysis consisting of 210 companies offering products and services in this ecosystem. For each covered vendor, we provide six key informational elements:

1. Contact information,
2. Either known or estimated revenues to determine financial health and stability,
3. An overview of the company's general business,
4. A description of the vendor's WebRTC products or services,
5. Two graphics, the first showing where the vendor fits in the overall WebRTC ecosystem and the second providing a visual view of the vendor's products, services, capabilities, or manufactured devices,
6. A brief analysis and opinion of the vendor, some with SWOT analyses.

The vendor profiles begin on page 38.

¹ This statement about WebRTC like a toddler is attributed to Google's Serge Lachapelle.

The WebRTC Ecosystem Segment Listings beginning on page 652 contain both a graphical and alphanumeric listing of all of the companies and the products, services, and capabilities they offer categorized according to 30 WebRTC Ecosystem segments defined in the model. The Ecosystem segment listing can be used to quickly ascertain which vendors may be appropriate for any given project or opportunity.

Overall, there are 872 individual company representations in the Ecosystem segments. Thus, on average, each company participates in 4 separate ecosystem segments. In addition, we show eight segment participations by non-corporate entities like GitHub and webrtc.org that are included for completeness.

As authors and WebRTC users ourselves, we share your interest in the WebRTC Ecosystem and hope that this report will serve as a useful navigational aid as you make decisions about how to best engage this dynamic ecosystem of companies, the highly fragmented market it is enabling, and the new and useful communications capabilities millions of developers will be creating.

What This Report Does Not Cover

The WebRTC Ecosystem report does not contain a primer describing WebRTC: how it works and functions. There are numerous sources on the Web that fill this need, including some created by the report authors².

This report is not intended to be a market analysis and does not predict the scale of the market or the opportunity in any of the specific Ecosystem segments. Market sizing analysis is presently left to others.

This report also avoids much of the hype surrounding WebRTC, instead reporting on the companies who offer real products and services that are WebRTC-enabled right now or soon will be.

Authors' Acknowledgement to Participating Vendors

The authors express their sincere appreciation to the vendors who invested time and energy into briefings which serve as the foundation for this report. Without their efforts, this report would have been impossible to prepare. We applaud their vision and their willingness to explore the uncharted world of the webification of communications using WebRTC as the enabling technology. Universally, these vendors have expressed that this WebRTC Ecosystem report will be a valuable tool for them as it has helped them better articulate their product sets and position their offerings for this emerging ecosphere of WebRTC products, services, and capabilities.

493 Figures, 686 Pages, 210 Company Profiles

² For example, see the [first in a series of articles](#) by one of the authors on NoJitter.com.

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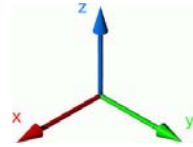
XYZ, Inc.

Address: 4444 WebRTC Blvd., Ste. 1234
San Jose, CA 95101

Corporate Structure: Private
Year Founded : 2002
2013 Revenues : \$450 million
Number of Employees: 1,050
Website: www.xyzinc.com

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LOGO HERE



WebRTC Ecosystem Segments

Solution Categories Available from []						
Complete Packaged Products	Development Solutions, Platforms, Tools, & Code					
	Complete Development Frameworks	Commercial Tools & Platforms		Open Source/Internal	Development Toolkits	
SP/Carrier		SDKs & Tools	Mobile SDKs & Tools	Code		
Video Conf Solutions	SP IMS Integrated	Messaging Infrastructure		Signaling/Data Channel		
Audio Conf Solutions	SP Non-IMS	SP/Carrier Gateways	Enterprise Gateways		Media & Services Toolkits	
UC & Comms Solutions	Enterprise On-Premises	SBCs	Media Servers	Media Servers		
Contact Center Solutions	Enterprise Cloud/Hosted	STI SW & SDKs	STI Services	STI Code		
End User Experiences						
Enabled Browser	Video End Points	Audio End Points	Wearable Devices	Digital Signage	Contract Resources	System Test

Company

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WebRTC Offering Overview

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Specific WebRTC Solution Offerings

Solution Categories - ████████		Target Market				Packaging								
		Carrier/SP	Enterprises	Developer	Consumers	Complete Packaged Products		Complete Development Framework		System Component		Tools and Code		
		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Service	On-Premises	Service	On-Premises	Service	On-Premises	SDK	Libraries	Open Source
Conferencing Solution	Audio			<input checked="" type="checkbox"/>										
	Video			<input checked="" type="checkbox"/>										
	Text			<input checked="" type="checkbox"/>										
	Content			<input checked="" type="checkbox"/>										
UC&C Solution	Audio													
	Video													
	IM/Presence													
	Content													
Contact Center														
Messaging Infrastructure				<input checked="" type="checkbox"/>										
IMS Integrated														
Gateways				<input checked="" type="checkbox"/>										
Session Border Controllers														
Audio Media Servers				<input checked="" type="checkbox"/>										
Video Media Servers				<input checked="" type="checkbox"/>										
STUN/TURN/ICE Servers				<input checked="" type="checkbox"/>										
IE/Safari Compatible				<input checked="" type="checkbox"/>										
Mobile OS Native Apps				<input checked="" type="checkbox"/>								<input checked="" type="checkbox"/>		
Basic Code														
Signaling Code														
STI Code														

Future Plans

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Public Use Cases

1. [Superfast Web Phone](#) – Superfast used our solution to increase business 40%
2. [US LMNOP Agency](#) – The government partnered with our consulting team to accomplish ...

Analysis and Opinion

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Dr. Brent Kelly is Principal Analyst at KelCor, Inc. where he focuses on the intersection of technologies comprising unified communications, social business, video, cloud services and mobility. He provides strategy and counsel to key client types: Chief Information Officers, Chief Technology Officers, investment analysts, VCs, technology policy executives, sell side firms and technology buyers.

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Dr. Kelly is a regular presenter at Enterprise Connect (formerly VoiceCon), the communications industry trade show where his well-respected tutorials have covered topics such as hosted and managed unified communications services, WebRTC, and Microsoft Lync/OCS technical deep dives. He is a co-organizer of the phenomenally successful all day technical tracks on WebRTC at Enterprise Connect. Dr. Kelly also contributes thought leadership articles regularly to NoJitter.com.

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Matt Krebs is a Research Analyst at KelCor, Inc. focused on human/technology interaction. His primary interest is in technological innovation, both hardware and software, and the emergent technosocial systems and possibilities that attend innovation. Matt's recent research, supported in part by Intel Labs, focuses on "the maker phenomenon" and FabLabs in Japan. This work addresses changing notions of ownership, value, and expertise in the context of information and communication technologies. Matt is a Ph.D. candidate in the department of anthropology at the University of Kentucky. Matt specializes in ethnographic and social network analytical research methods. Matt was previously the director of the Japan/America Society of Kentucky (JASK) where he worked with Toyota, Hitachi, and other auto-

industry OEMS and suppliers. At JASK, Matt redesigned business processes and customer relations to incorporate new web-presence and communication software. Matt has also worked for a regional development agency in Kentucky (BGADD) where he developed its international trade consulting business and arranged a region-wide study of business clusters. Matt has an M.A. in international commerce and diplomacy (University of Kentucky) and a B.A. in international studies (Brigham Young University).

About KelCor, Inc.

KelCor (www.kelcor.com) is a specialized consulting and analyst firm with a passion for providing client satisfaction through product and service excellence. We have laser focus on the business communications market, emphasizing those products and services that are proven to accelerate an organization's business processes.

We provide value to our end-user and vendor clients by offering an unbiased, 360° view of the unified communications and collaboration marketplace. We prepare research reports, vendor profiles, market forecasts, white papers, case studies, and presentations designed to inform, educate, and assist vendors with strategy, tactics, market approaches, and end user attitudes to help them identify and capitalize on opportunity. We help our end-user clients understand options, strategies, competitive vendor offerings, and best practices engaging our collaborative process engineering expertise, all designed to improve organization efficiency while increasing top line revenues or bottom line profits.

KelCor data and reports provide more detail and analysis about collaborative markets, offerings, and strategies than anyone. The depth of our reports and our ability to discern key market trends significantly differentiates us from any other consulting and analyst firm you've ever worked with. See our website for a listing of our reports at <http://www.kelcor.com/Pages/VendorReportsandAnalysis.aspx>.

About PKE Consulting, LLC

PKE Consulting provides strategic consulting and analysis at the intersection of computing, networking, and communications. The primary focus is on how the integration of information and interaction can create value transformation for organizations. This is often referred to as Unified Communications or Communications Enabled Business Processes. PKE Consulting services include organization planning for how to best utilize technologies for transformation. PKE Consulting also works to assure that the underlying network infrastructure is capable of supporting the new services. PKE Consulting provides services both to end user organizations and to vendors.

End User Services

For End User Organizations, PKE Consulting works with the organization at all stages of the project. From conception of how the information/interaction integration can create value through to defining which technologies and vendors are best suited, to assistance in the deployment, PKE Consulting can assure that the planned implementation meets both organizational and technical goals.

Vendor Services

For vendor companies, PKE Consulting provides services ranging from strategic business planning to technical implementations and technology analysis. In addition to traditional products, PKE Consulting can assist with M&A analysis and activity including due diligence and integration. Select PKE Consulting as an outside presenter for your next seminar series and the results will be outstanding.