

Magic Quadrant for Web Conferencing, 2007

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Consolidation continues in the Web conferencing market as vendors prepare for shifting market realities. End users will drive these shifts as they adopt new deployment models and look for deeper functionality.

WHAT YOU NEED TO KNOW

Web conferencing continues its transition from a specialized technology to a generally available collaboration tool. Many organizations still look at Web conferencing products to support specific purposes, such as e-learning and online marketing events. However, they increasingly position Web conferencing functionality as another form of collaboration alongside instant messaging (IM) and e-mail, open to all employees, rather than something needing special justification and provisioning. Buying patterns, licensing preferences and vendor negotiation tactics will change as Web conferencing achieves this “birthright” status of tools provided to all employees.

The market for Web conferencing products will undergo important changes during the next several years as vendors react to this shift and develop differentiation strategies. Some vendors (especially the larger ones) will look to support this trend toward infrastructure-level support for collaboration, while others will focus on specific features and deeper functionality to compete.

Just before this Magic Quadrant was completed, Cisco announced its intention to acquire market-leader WebEx. This acquisition, along with Microsoft's plan to offer an on-premise version of Live Meeting, will change the market significantly in the next year to increasingly favor collaboration platforms over best-of-breed offerings. By 2010, 60% of companies using Web conferencing will acquire this capability as part of a larger suite of applications, rather than from a specialist vendor (0.8 probability).

As adoption of Web conferencing increases, competitive pressure on pricing and licensing models also continues to increase. Common pricing practices include per minute, named user, concurrent user or port, and enterprise (unlimited access) approaches (see “Web Conferencing Pricing”). Although market revenue growth is around 20% per year, actual use – as measured by user minutes – far exceeds that growth rate, approaching 75% to 100% or more growth per year.

STRATEGIC PLANNING ASSUMPTION(S)

By 2010, Web conferencing will be available to 75% of corporate users as a standard facility, alongside e-mail, presence, calendaring, IM and other collaborative facilities (0.8 probability).

By 2009, 40% of all Web conferences will be operated using on-premise deployments (0.7 probability).

By 2010, 60% of companies using Web conferencing will acquire this capability as part of a larger suite of applications (0.8 probability).

Market Overview

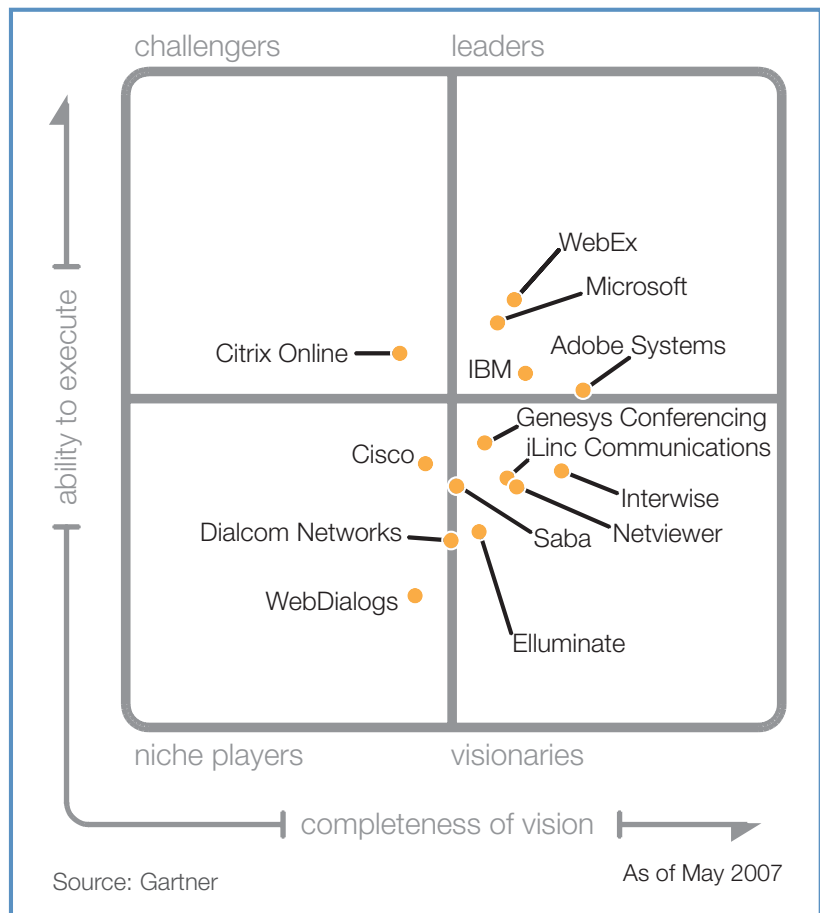
Web conferencing collaboration products support interaction over a network among participants in real time, in a peer-to-peer meeting or one-to-many presentation format. Organizations use them to enable people to participate in meetings when they cannot or would prefer not to meet in the same physical location. Although the greatest benefits generally come from increased collaboration (including meetings that would not have occurred if the online option were not available), the high cost of business travel, and travel restrictions due to security or health concerns, are major drivers for increased Web conferencing. Some organizations cite "green" concerns as a reason to replace carbon-producing travel with remote Web conferences. Gartner estimates that Web conferencing was a \$935 million market in 2006, growing at 19.5% compound annual growth rate through 2010.

Effective organizations use Web conferencing as more than just a substitute for face-to-face meetings. Increased collaboration at all levels is crucial to the high-performance workplace concept. Web conferencing can help people work with colleagues and business partners, share information, make better decisions, work on more projects simultaneously and increase the impact of their work. In some cases, they can offer efficiencies beyond physical meetings (through polls and testing or backroom chats). Reducing travel can provide hard return on investment savings, but improved ways of working can provide far greater benefits.

The minimal set of functionality that a Web conferencing product should offer includes:

- **Presentation delivery:** All participants can see an online presentation (usually delivered by Microsoft PowerPoint), which is under the control of one participant designated as the presenter.
- **Desktop or application sharing:** All participants can see, but not directly interact with or modify, the presenter's desktop or a specific application on the presenter's system. Some Web

Figure 1. Magic Quadrant for Web Conferencing, 2007



conferencing products deliver presentations by sharing a presentation application, rather than using embedded presentation facilities.

- **Text chat:** Participants can exchange real-time text messages with other participants or the presenter using an IM-like interface.
- **Shared whiteboard:** A meeting participant can add annotations viewed by all by typing or drawing on a specific whiteboard application, or on top of a presentation or shared application window.
- **Basic security:** Encrypted data transfer and password-protected meetings.

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Increasingly, Web conferencing products are being augmented by more-advanced, optional features, such as:

- **Integrated public switched telephone network audio:** Users can dial into an audioconferencing bridge that is linked into the Web conference. Participants can see who is speaking and presenters can control individual phone connections (such as mute or give presenter rights).
- **Integrated voice over IP (VoIP) audio:** To remove or reduce the need for telephone-based audio, some products can use a PC's speaker and microphone (or a headset) to enable participants to listen to a presentation or (more rarely) to talk and listen.
- **Videoconferencing:** Some products can show live video feeds of participants or the presenter, which come from a desktop Web camera or a dedicated video installation.
- **File sharing:** Participants can exchange files during the conference.
- **Application/document sharing:** Participants can write directly into the presenter's application or document.
- **Advanced security:** Extra features that are required for sensitive meetings. These features include participant-level passwords to prevent sharing, forcing new passwords for every meeting; the ability to block anonymous users, limiting participants to specific IP addresses; and automatic purging of online documents after the meeting.
- **Remote control:** Useful for technical support. It gives one participant control of applications or the desktop on another system.
- **Archiving:** Audio and interactive portions of the conference can be recorded for later viewing. Participants can "sit in" on the conference if they were not able to attend in real time. Archiving mandated by regulatory audit trail requirements is on the rise.
- **Feedback:** Participants can indicate whether they want the speaker to slow down, speed up, answer a question and more.
- **Polling:** A quick survey of participants to answer a specific question in real time can be conducted.
- **E-learning facilities:** Specific functionality to support online training and learning scenarios can be incorporated, such as participant testing, teacher monitoring of student desktops and learning management system integration.

Users have three deployment options for these applications

- **Software-as-a-service (SaaS) model** – Web conferencing software runs on the vendor's (or a partner's) systems on a multitenancy basis, and the user accesses the capabilities over the Internet (see Note 1).
- **On-premise model** – Installs software on systems owned and operated by the enterprise.
- **Blended model** – Combines the SaaS model and the on-premise model.

Everyday meetings are typically run using on-premise facilities, and unusually large meetings use software running on external servers. The SaaS model has been particularly successful in the Web conferencing market, more so than in most other technology areas. It provides low barriers to entry for technology that is unfamiliar to many users and IT departments.

About 70% to 80% of Web conferences are run on SaaS deployments. We expect this percentage to drop in favor of more on-premise deployments, driven primarily by security and cost concerns, although the SaaS model will remain dominant for some time. By 2009, 40% of all Web conferences will be operated using on-premise deployments (0.7 probability). Microsoft will release an on-premise version of Live Meeting in 2H07, driving a spike in on-premise deployments (this version is not reviewed in this Magic Quadrant because it is not yet available).

Market Definition/Description

Web conferencing traditionally has been considered a specific point solution by most organizations, acquired to fulfill a particular need. However, many organizations are looking to acquire this capability as a standard part of their integrated collaboration environments, rather than as a special tool made available to select users. By 2010, Web conferencing will be available to 75% of corporate users as a standard facility, alongside e-mail, presence, calendaring, IM and other collaborative facilities (0.8 probability).

Most organizations use standard telephone bridges for the audio portions of their Web conferences, whether included as part of the Web conferencing service or sourced separately. We see growing interest in desktop VoIP capabilities, where audio is handled directly by the Web conferencing product. VoIP, in general, is becoming more widely accepted for enterprise use and has particular advantages in the Web conferencing market, including on-screen control of speakers and removing the need to distribute separate bridge phone numbers and PIN codes. The disadvantages include the need to distribute headsets, as well as quality and bandwidth concerns.

Video is also gaining in popularity. The ability to see other participants and hear them adds significant advantages to the collaborative experience. Wide availability of inexpensive Universal Serial Bus (USB)-based webcams and greater bandwidth make video increasingly viable in Web conferences.

As the Web conferencing market matures, consensus among sellers and buyers is forming on expected functionality. Most major Web conferencing vendors support the features described here in some form. They seek innovation and differentiation in areas such as ease of use (reservation less, no client or thin Ajax clients), pricing (unlimited, per minute or per event), platform support (Java, .NET, Flash or proprietary), advanced features (such as VoIP and video) and integration with business applications.

As in many areas of collaboration technology, the influence of lower-end consumer software has been growing. Several of the vendors reviewed offer low-price or free versions with limited functionality, often using the consumer-oriented Skype VoIP service as a distribution platform. With Google's acquisition of Maratech, it is likely to enter this part of the market. As with many free services, Google hopes that users will carry the products they use at home into the workplace and upgrade to more fully functional versions. However, the target audience for this Magic Quadrant is enterprise users, who tend to favor fully functional offerings from vendors equipped to sell to the corporate market.

Inclusion and Exclusion Criteria

We used the following criteria to determine which products to include in this Magic Quadrant:

- The product provides at least the minimal capabilities described above.
- The product supports at least five participants. Products that support one-to-one or small groups are generally aimed at the consumer or other specialized markets not covered in a Magic Quadrant.
- The vendor must market the Web conferencing product on a stand-alone basis, not just bundled with or dependent on a larger application. Products that are available in a suite of real-time collaboration products (including presence and IM) are eligible.
- The vendor must have at least \$7.5 million in annual revenue from Web conferencing product sales. This criterion is 50% higher than the limit in the previous Magic Quadrant, reflecting the increasing maturity of this market.
- Sales and marketing efforts of the product are not limited primarily to a particular vertical industry or horizontal process (such as training).
- The vendor must develop and market the primary Web conferencing product, not resell a “white label” product produced by another company in an OEM relationship.

The following vendors' products are evaluated in this year's Web conferencing Magic Quadrant:

- Adobe Connect Professional V6 (formerly called Macromedia Breeze)
- Cisco Unified MeetingPlace V5.4
- Citrix GoToMeeting V3.0 and GoToWebinarV1.0
- Dialcom Unified Collaboration V5.4
- Elluminate Live! V7
- Genesys Meeting Center V4
- IBM Lotus Sametime V7.5
- iLinc Web Conferencing Suite V8
- Interwise Connect V7.2
- Microsoft Office Live Meeting 2005
- Netviewer one2meet V4
- Saba Centra Live V7.5
- WebDialogs Meeting Central V7.2
- WebEx Meeting Center, Sales Center, Support Center, Event Center, Training Center and MeetMeNow

Added

Three vendors have been added to this year's Magic Quadrant:

- **iLinc** and **Elluminate** previously focused on online classroom functionality, but have expanded into the general Web conferencing market.
- **Dialcom** is a European company (based in Madrid) that has gained market share during the past year.

Dropped

The following vendors are not included in this Magic Quadrant:

- **Oracle** has shifted its strategy to sell its Web conferencing component almost exclusively as part of its Oracle Collaboration Suite, together with e-mail, IM and team workspaces.
- **Polycom** has de-emphasized its Web Office product. It prefers to promote its integration with partner products, such as Microsoft Live Meeting.
- **Arel Communications** concentrates marketing efforts on its video offerings more than its Web conferencing product, which has not gained sufficient market share to be included.
- **Raindance** was acquired in April 2006 by InterCall, which offers several different Web conferencing products, including Raindance and Mshow, in addition to reseller agreements for Microsoft Live Meeting and WebEx. Raindance has received limited prominence under InterCall, which instead chooses to emphasize its audioconferencing business.
- Because **Netspoke** was acquired in late 2005 by Premiere Global Services, it was not included in the previous Magic Quadrant. Premiere Global Services also resells Microsoft Live Meeting and WebEx in addition to its own Netspoke offering. However, Netspoke does not meet the minimum criteria for Web conferencing revenue to be included in the 2007 Web conferencing Magic Quadrant.

Evaluation Criteria

Ability to Execute

Several factors contribute to the vendors' execution ratings. The product capabilities were evaluated separately for basic and advanced functionality. Because this market includes many small vendors with uncertain futures, financial viability was an important factor. We evaluated pricing in terms of comparative price levels and vendors' flexibility in supporting the kinds of pricing models that customers are looking for (such as concurrent user, named user, per-minute and flat rate). User experience was judged by conversations with our customers who use the product, or from reference calls with users supplied by the vendors (see Table 1).

Completeness of Vision

We evaluated the completeness of vision by looking at how the products align with how users want to use and buy them. To evaluate vendors' marketing and product strategies, we looked at how they position their products and whether the products adequately address the chosen positioning. Flexibility to support SaaS and on-premise deployment was rated higher than a strategy of concentrating on one model only. We also evaluated vendors' product innovation and ability to address trends we expect to see in the Web conferencing market (see Table 2).

Leaders

Vendors in the Leaders quadrant have achieved significant market share while demonstrating their ability to respond to customers' needs. Leaders have robust, scalable products with a wide range of features, a large installed base, acceptable financial performance and good distribution. Leaders do well today and are prepared for the future.

Challengers

There is only one vendor in the Challengers quadrant this year. Vendors in this quadrant are characterized by operational excellence or a good standing in the market, but lack some aspects of their product features or long-term road maps in relation to vendors in the Leaders or Visionaries quadrants.

Visionaries

Visionaries typically have an important, unique or well-developed technical capability and provide key elements of innovation that illustrate the future of the market. However, they have not yet developed sales and support capabilities to address or influence the complete market.

Niche Players

Niche players may have good technology, but are limited by their size, product line breadth, vertical or horizontal focus, geographic niche or financial circumstances. Some have chosen a niche strategy (for example, regional vendors with a local focus or targeted functionality intended to run on top of or with other technologies).

Vendor Strengths and Cautions

Adobe Systems Strengths

- Built on the Flash platform, Adobe offers strong performance and a wide range of features, including personal meeting rooms, a highly configurable user interface, and excellent video and VoIP support in SaaS and on-premise deployment modes.
- The underlying use of Flash eases deployment and makes presentation and whiteboard displays fully resizable, so users don't have to scroll or switch to full-screen windows.
- Integration with Adobe Acrobat provides a natural launching point for document-based Web conferences.

Cautions

- Personal meeting rooms lack library functions, such as check-in/check-out and version control.
- Customer support and sales performance effectiveness declined during the period when Adobe was acquiring Macromedia.

Cisco Strengths

- Cisco emphasizes a unified communications strategy that integrates Web conferencing/videoconferencing and meeting management with its voice, network and call management offerings.
- MeetingPlace is a robust, enterprise-oriented product with many possibilities for extensions and customization.

Table 1. Ability to Execute Evaluation Criteria

Evaluation Criteria	Weighting
Product/Service	high
Overall Viability (Business Unit, Financial, Strategy, Organization)	high
Sales Execution/Pricing	standard
Market Responsiveness and Track Record	low
Marketing Execution	standard
Customer Experience	high
Operations	low
Source: Gartner	

Cautions

- On 15 March 2007, Cisco announced that it would acquire WebEx. Future product road maps were not available before publication of this Magic Quadrant.
- MeetingPlace is relatively difficult to use, compared with several competitors. Usability should improve with version 6 (expected in mid-2007).
- The primary focus of MeetingPlace is audioconferencing; Web conferencing is an important, but secondary, priority.

Table 2. Completeness of Vision Evaluation Criteria

Evaluation Criteria	Weighting
Market Understanding	high
Marketing Strategy	high
Sales Strategy	standard
Offering (Product) Strategy	high
Business Model	standard
Vertical/Industry Strategy	low
Innovation	high
Geographic Strategy	low
Source: Gartner	

Citrix Online Strengths

- Citrix Online's products favor usability over advanced functionality in a lightweight product aimed primarily at small and midsize businesses (SMBs).
- Its products download quickly and are reportedly easy to use and manage.
- Citrix uses its extensive distribution and partner network to bring its products to market.

Cautions

- Enterprise users may miss some advanced functionality, such as server-based presentations, video for all participants or testing.
- No on-premise deployment option.
- Citrix Online's SMB-oriented business model could be less appropriate for large, enterprise-level deals.

Dialcom Networks Strengths

- Offers high-quality, embedded video and VoIP.
- Dialcom is the only vendor in this Magic Quadrant to target mobile devices as a Web conferencing client platform.

Cautions

- Dialcom is one of the smaller vendors in this Magic Quadrant, with a short history of selling in the global enterprise market.
- Its focus on video and voice capabilities, and selling to the mobile operator market, could distract it from the corporate Web conferencing market, compared with other vendors that focus exclusively on this market.

Illuminate Strengths

- Offers a free version for up to three participants under the vRoom brand.
- Supports a variety of clients (such as Windows, Macintosh, Linux and Solaris).
- Extensive facilities for e-learning, including testing facilities and integration with several course management systems.

Cautions

- Primarily aimed at e-learning use cases. Collaborative Web conferencing is a secondary focus for the organization.
- Does not supply or support audioconferencing bridges, but rather relies on VoIP only for meeting audio requirements.
- One of the smaller vendors in this Magic Quadrant.

Genesys Conferencing Strengths

- Focuses on large, enterprise-scale deployments. High penetration among Global 500 companies.
- Per-minute pricing model ties its revenue to customer success. If customers don't use the service, then Genesys doesn't get paid.

- Steady stream of product innovations (such as multimedia minute, video, VoIP and Ajax client).

Cautions

- Although generally profitable, Genesys has had mediocre financial results, with a low share price and smaller revenue growth than most competitors.
- No on-premise deployment option.
- Committed to the per-minute pricing model, while many customers look for flat-rate, named-user licensing.

iLinc Communications Strengths

- Full-featured suite with specific functionality for sales, webinars, training and support.
- Integrated with several CRM, collaboration and learning management products.

Cautions

- Windows is the only client platform supported. Macintosh support is planned for mid-2007.
- One of the smaller vendors in this Magic Quadrant.

IBM Strengths

- Popular with enterprises using Domino that are looking for an on-premise, integrated, real-time collaboration suite.
- Tight integration with IBM's Lotus Notes/Domino applications and Sametime IM.
- Sametime V7.5 (released in late 2006) addresses several common issues (such as cross-firewall access, the user interface and robust session connections).

Cautions

- No SaaS deployment option aside from hosting/outsourcing partners.
- Little penetration outside the Lotus user base. A new release in 3Q07 (V7.5.1) has targeted enhancements for Outlook users.

Interwise Strengths

- Offers on-premise and SaaS deployment models, with a blended option to flexibly combine the two.
- Has strong voice capabilities (such as desktop VoIP, an integrated audio bridge and PBX integration) and a flexible, distributed architecture.
- Highly configurable and customizable when needed to support advanced requirements for security, network infrastructure and business application integration.

Cautions

- When offered on an enterprise basis covering everyone in the company, Interwise can seem expensive when compared with departmental or limited functionality offerings.
- Windows is the only client platform supported. Wider client support is planned for 3Q07.

- Product and sales approach is less suited for SMBs.

Microsoft Strengths

- Microsoft positions Live Meeting as part of the Office system and as a SaaS offering. It works together with Microsoft Office Live Communication Server's on-premise presence and IM server, and Microsoft Office Communicator – the IM client.
- In mid-2007, Microsoft will release Office Communications Server, which combines Live Communication Server functionality with an on-premise version of Live Meeting.

Cautions

- VoIP support is limited to broadcasting only one presenter at a time in Live Meeting 2005. Video support is also very limited, but improvements are promised in the 2007 version.
- Overlapping functionality of Live Meeting and Windows Net Meeting confuses customers. This will get worse with Windows Vista's Meeting Space and the bundled, on-premise meeting capabilities in Office Communications Server 2007.

Netviewer Strengths

- Germany-based Netviewer has seen strong growth during the past several years, primarily in Europe.
- Integrated into several third-party applications (such as MindManager, matrix42 and Projectplace).
- Strong in training and technical-support use cases.

Cautions

- Aimed primarily at departmental use, with some customers moving to enterprise adoption.
- Windows is the only client platform supported.

Saba Strengths

- Offers deep integration with Saba's learning management products.
- Centra is a robust solution with wide functionality and specific capabilities tailored for e-learning and other use cases.

Cautions

- Saba is primarily an e-learning and human capital management vendor. Collaborative Web conferencing is a secondary focus.
- Centra is appreciably more expensive than most Web conferencing competitors in this market.

WebDialogs Strengths

- Specializes in providing basic Web conferencing services for resale by channel partners, such as audioconference providers and IP/PBX vendors on a white-label or OEM basis, including ConferencePlus, AT&T and BT Conferencing.
- Offers functionality that can be integrated with other offerings at relatively low prices.

Note 1

Software-as-a-Service Definition

Gartner defines SaaS as “software that's owned, delivered and managed remotely by one or more providers.” The provider delivers an application based on a single set of common code and data definitions, which are consumed in a one-to-many model by all contracted customers at anytime and on a pay-for-use basis, or as a subscription based on use metrics.

Vendors Added or Dropped

We review and adjust our inclusion criteria for Magic Quadrants and MarketScopes as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant or MarketScope may change over time. A vendor appearing in a Magic Quadrant or MarketScope one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. This may be a reflection of a change in the market and, therefore, changed evaluation criteria, or a change of focus by a vendor.

- Offers a free entry-level service under the Unyte brand for two participants as an add-on to Skype. Users can upgrade to more functionality and number of users.

Cautions

- One of the smallest vendors in this Magic Quadrant in terms of company size and revenue.
- Although WebDialogs' prices are generally low, demanding users could miss more-advanced functionality (such as whiteboard, video or full duplex VoIP). Version 8, available in 3Q07, will include more features, including video.

WebEx Strengths

- Remains the market leader with strong financial and stock performance.
- Maintains its own high-traffic network (MediaTone) to improve performance and reliability.
- Deep functionality with specific editions for different use cases (such as meetings, webinars, support, training and sales).

Cautions

- On 15 March 2007, Cisco announced it would acquire WebEx. Future product road maps were not available before publication of this Magic Quadrant.
- Audioconferencing bridge services are not competitive with third-party offerings.
- Pricing policies can be uneven. Customers in long-term contracts often do not benefit from subsequent price drops.
- Users must ensure that the functionality they need is in the edition they choose. Some commonly used features are only available in specific editions.

Evaluation Criteria Definitions

Ability to Execute

Product/Service: Core goods and services offered by the vendor that compete in/serve the defined market. This includes current product/service capabilities, quality, feature sets, skills, etc., whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.

Overall Viability (Business Unit, Financial, Strategy, Organization): Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood of the individual business unit to continue investing in the product, to continue offering the product and to advance the state of the art within the organization's portfolio of products.

Sales Execution/Pricing: The vendor's capabilities in all pre-sales activities and the structure that supports them. This includes deal management, pricing and negotiation, pre-sales support and the overall effectiveness of the sales channel.

Market Responsiveness and Track Record: Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the vendor's history of responsiveness.

Marketing Execution: The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message in order to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This "mind share" can be driven by a combination of publicity, promotional, thought leadership, word-of-mouth and sales activities.

Customer Experience: Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways customers receive technical support or account support. This can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups, service-level agreements, etc.

Operations: The ability of the organization to meet its goals and commitments. Factors include the quality of the organizational structure including skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis.

Completeness of Vision

Market Understanding: Ability of the vendor to understand buyers' wants and needs and to translate those into products and services. Vendors that show the highest degree of vision listen and understand buyers' wants and needs, and can shape or enhance those with their added vision.

Marketing Strategy: A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the Web site, advertising, customer programs and positioning statements.

Sales Strategy: The strategy for selling product that uses the appropriate network of direct and indirect sales, marketing, service and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base.

Offering (Product) Strategy: The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature set as they map to current and future requirements.

Business Model: The soundness and logic of the vendor's underlying business proposition.

Vertical/Industry Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments, including verticals.

Innovation: Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes.

Geographic Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries as appropriate for that geography and market.