

## Vendor Profile

# Sharp Electronics Corporation Enhances Smart Meeting Room Collaboration

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### IDC OPINION

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Sharp Electronics Corporation (SEC) is a highly recognized and respected global manufacturer of consumer products for home appliances and home entertainment, as well as for document systems, collaboration displays, and commercial displays for business organizations. This IDC Vendor Profile specifically looks at Sharp offerings in the business collaboration space (i.e., displays and data analytics application suite), in conjunction with its Smart Office initiative. Even prior to the COVID-19 pandemic in early 2020, the global unified communications and collaboration (UC&C) market was experiencing increasing interest and adoption in cloud-based solutions for voice, video, messaging, and meetings. And since COVID-19 hit, the number of collaboration end users, including many who continue to work from home (WFH), has risen exponentially. According to IDC, in 2Q20, the collaboration market (including video software and cloud services) saw its revenue grow 46.9% year over year and 22.4% sequentially to \$5.5 billion, with seats (i.e., number of end users) increasing 35.5% year over year. Meetings and video collaboration are also expected to remain hot areas of interest and adoption for organizations of all sizes going forward. IDC believes that Sharp is well positioned as a supplemental partner to meet the growing enterprise demand for its display offerings in business collaboration environments based on the following:

- Sharp understands that the workforce and workstyles are changing and becoming more diverse. It has the tools and offerings to supplement these new workstyles, such as the certified for Microsoft Windows Collaboration Display (WCD) touchscreen display for conference room use, or Dynabook laptops for personal use (with many models having touchscreen capability), as well as the Sharp Synappx application suite for data and analytics – designed to provide real-time intelligence for meeting/collaboration spaces.
- The Sharp Smart Office initiative outlines the company's vision of what comprises a smart office environment today, including Sharp solutions for employee messaging, safety and wayfinding, building management, structured and ad hoc meetings, and document workflows. To enable its Smart Office vision, Sharp continues to tweak its go-to-market model to ensure proper market coverage and ecosystem partnerships, as well as its alignment with changing purchasing models.
- But conversely, IDC feels that Sharp's brand awareness and overall mindshare in the extremely competitive global UC and collaboration markets are not as high as in other consumer and commercial product areas in which the company competes. In that regard, we feel Sharp has some work to do as far as continuing to develop its business alliances and channel partnerships specific to the UC&C market.

## IN THIS VENDOR PROFILE

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This IDC Vendor Profile examines Sharp Imaging and Information Company of America, a division of Sharp Electronics Corporation (SEC). One focus for Sharp, among others including multifunction printers and laptop PCs, is on provisioning displays for collaboration meeting environments, as well as the analytics of such – the main emphasis of this vendor profile. Data and information for this vendor profile has been gleaned from IDC participation in briefings with Sharp company executives and product managers. Additional insight includes perceptions of Sharp from industry sources.

## SITUATION OVERVIEW

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### Company Overview

Sharp Imaging and Information Company of America is a division of Sharp Electronics Corporation. SEC is a wholly owned U.S. subsidiary of Osaka-based Sharp Corporation. Sharp Imaging and Information Company of America markets Sharp's business products that can simplify smarter working and boost productivity. Product offerings include professional and commercial displays to facilitate collaboration in smart office domains, data-based insights for business workspaces, and networked multifunction office solutions. In 2018, Sharp Corporation purchased the Dynabook personal computer business from Toshiba, and on November 1, 2020, closed a deal it had previously announced to purchase NEC Display Solutions.

### Company Strategy

In the collaboration space, a big strategic focus for Sharp is on its "simply smarter work" initiative defined by the following:

- Accelerated communications and collaboration
- Digitized documents and workflows
- Improved efficiencies and reduced cost
- Increased information security
- Safer work experiences

The way in which organizations work has evolved. Both the workforce and workstyles are changing and becoming more diverse. For employee teams to be at their very best, each member must feel included, have easy access to information, and be able to participate in the collaborative process. Sharp has customers that have built teams to enable that. But what happens when you don't provide tools to support these new workstyles? Users download consumer-grade tools, creating friction as users must manage multiple log ins and move between different experiences. This in turn creates risk for the organization as shadow IT develops.

There are several trends that Sharp sees regarding teamwork:

- **Diversity:** Teams are becoming more diverse. In today's work environment, teams are often comprised of people in different buildings, time zones, or even different companies. For the first time, there are five generations in the workplace – all with different backgrounds and expectations about collaboration tools. For example, some are comfortable chatting on a phone, others prefer email, chat/IM, or face to face. Sharp is finding the same with displays. Some people like a front-of-room display and some like their personal devices. Whether

touchscreen (AQUOS BOARD or WCD) at the front of the room or on a laptop (many Dynabook models are touchscreens), Sharp can accommodate both.

- **Team based and collaborative:** There is also a movement toward transparency and inclusivity in how decisions are made. Organization structures are becoming flatter, which results in people being on cross-organizational teams more often. And those teams are dynamic. It's rare that people don't change on a multimonth project. And when they leave, the first step is for all to go through their email to find the information needed to get the new person up to speed. Being on more teams has also led to a dramatic increase in the amount of collaboration. The new way of work is team based and collaborative. Workers report that up to 80% of their time at work is spent collaborating (i.e., in meetings, calls, chats).
- **Global:** Teams are increasingly geographically distributed. Employees are no longer in the same office, let alone time zone. Per the pandemic, significantly more employees are now and will be permanently working remotely in 2021. For many employees, this has made face-to-face conversations and overall collaboration efforts more challenging. It's harder to maintain open dialogue, and it's more complicated to manage the volume of information when teammates are distributed and have difficulty attending every meeting. All these challenges hinder teamwork and productivity.

### Smart Office Domain for Collaboration

Sharp's vision of what comprises a smart office domain for collaboration includes the following:

- Smarter Signage (for employee messages)
- Smarter Reception (for safety and wayfinding)
- Smarter Meeting Rooms (for collaboration and comfort)
- Smarter Document Workflows (for app/NFC and voice-controlled print)
- Smarter Energy (potential for sensor alignment with building management solutions)
- Smarter Collaboration (for structured and ad hoc meetings)

Figure 1 illustrates the Sharp Smart Office Domain for collaboration.

### FIGURE 1

#### Sharp Smart Office Domains – Collaboration



Source: Sharp, 2020

## *Sharp Go-to-Market Strategy*

To enable this vision, SEC continues to tweak its go-to-market model to ensure proper coverage, the proper ecosystem, and alignment with changing purchasing models. Its vast office technology dealer network is hungry for new "smart office" solutions, while audio/visual (AV) and IT distributors and AV integrators are looking to converge solutions around IoT (i.e., sensor-laden displays as IoT endpoints) and displays. The company's own growing Sharp Business Systems direct branch network also sells the full portfolio of its solutions, provides an immediate path for customer feedback, and allows solution incubation for other channels.

SEC has also elevated its focus on ecosystem partners and alliances – its most noteworthy relationship being with Microsoft. Aside from larger Sharp Corporation ties to Microsoft, SEC was the first to certify a Windows Collaboration Display from Sharp with Microsoft and is a Gold Certified service provider across multiple specialties through its branch network. AV alliances such as with Crestron, Intel, Barco, Salamander, and Peerless are positioned to provide simpler management in complex environments. And, Sharp manages its own Star Alliance and Sharp Partner Program ecosystems to help smaller ISVs move with it into the newer solutions sets around Smart Office.

Last, Sharp is quick to point out its interest in enabling its channels to provide solutions from traditional purchases and leases to more bundled technology-as-a-service offerings. Sharp is seeing increased interest in bundled solutions that include per-month/per-employee price options and is working with leasing companies and software providers to accommodate these different pricing models.

Sharp summarizes the characteristics of Smart Office as follows:

- Data and artificial intelligence (AI) driven
- Interactive
- Connected
- Collaborative
- Intuitive (includes voice, gestures, facial recognition)
- Predictive (search, information, needs)
- Automated (requires minimum human interface)
- Engaging

When a global management consultancy opened a new office, the firm wanted to continue its practice of efficient collaboration and effective meetings. To meet its goals, the consultancy chose a Windows Collaboration Display featuring Synappx WorkSpaces from Sharp. As a result, the company created a better meeting room environment in which global teams can work together efficiently with Teams and other apps in Microsoft Office 365. The solution includes the IoT Sensor Hub, which automatically measures ambient temperature and helps optimize meeting space utilization.

Meetings get started quickly thanks to easy connectivity and USB-C support for BYOD laptops and other devices. The WCD integrates with Teams and Office 365 to create a room-sized hub for collaboration and productivity. The device works with existing IT infrastructure to facilitate the implementation and the intuitive display helps employees through the adoption process.

## Sharp Collaboration Product Offerings

Table 1 summarizes the Sharp Meeting Room Displays currently being offered.

**TABLE 1**

### Sharp Meeting Room Displays

	Commercial Display	Interactive Display	Windows Collaboration Display
Sharp offerings	Commercial displays	AQUOS BOARD	Windows Collaboration Display (WCD)
Engaging content	Yes	Yes	Yes
Open ecosystem A/V	Yes	Yes	Yes
Interactive touch	No	Yes	Yes
Native wireless	No	Most models	Yes
USB-C simple connectivity	No	No	Yes
BYOD smart switching	No	No	Yes
Includes IoT sensors	No	No	Yes
Certified for Microsoft UCC	No	No	Yes

Source: Sharp, 2020

In particular, the Windows Collaboration Display from Sharp was the first WCD certified for use with Microsoft UC&C applications and features a high-resolution, multitouch, and ink-enabled display, along with integrated stereo speakers. Skype for Business certified far-field microphones and high-resolution camera help facilitate video collaboration. Microsoft Teams certification is expected by the end of 2020. Built-in sensors connect to Azure IoT and provide smart space management solutions with Azure Digital Twins. Sharp WCD connects to Skype Room Systems, as well as Teams Rooms, and supports third-party UC&C applications (e.g., Zoom) to simplify meetings from external PCs or personal devices in a BYOD environment.

### *Measuring the Effectiveness of Collaboration with Data and Analytics*

The Synappx application suite – which includes Synappx Go, Synappx Meeting, and Synappx WorkSpaces – complements the Sharp hardware platform. The applications support both Microsoft 365 and Google G Suite environments. At a high level:

- **Synappx Go** is designed for a mobile-first world and the sudden demand for contactless management of shared devices, as employees move about the workplace during the day by enabling mobile app-based authentication and control of shared office equipment. As such, it works with Sharp OSA-enabled multifunction printers (MFPs), Sharp AQUOS BOARD, and professional displays, as well as the Windows Collaboration Display from Sharp.

- **Synappx Meeting** is designed to help automate the task at the beginning and ending meetings and supports the line of Sharp AQUOS BOARD interactive displays and professional displays, as well as the Sharp WCD, while complementing common videoconferencing platforms.
- **Synappx WorkSpaces** extends the value proposition of the Sharp WCD by providing reports and actionable analytics to help confirm that employees are maximizing the investments for collaboration to drive productivity. It does this by combining the usage and sensor data from the Sharp WCD with Microsoft 365 calendar data for greater insights.

Synappx WorkSpaces provides organizations with analytics designed to provide real-time intelligence for meeting/collaboration spaces. It enables those who need it (e.g., IT) to effectively measure the impact of their organization's collaboration workspace and technology investments, making customer workspaces smarter and more productive. It's delivered as a cloud-based services (SaaS) subscription per device.

The Synappx application suite provides value for customers by helping them measure the effectiveness of their collaboration spend. And with limited resources, it's critical for customers to make the right investments. Common employee collaboration concerns include comments such as "meeting rooms are never available" and "workspaces are uncomfortable." Are these comments about behaviors, the workplace, or the technology? Synappx applications help customers clarify issues through data and analytics.

IDC's Future of Work Survey (November 2019) revealed that businesses have measures of success, but most are not effectively measuring the true effects of a technology deployment or initiative relative to overall business success. The Synappx application suite can answer the question: "Where can the organization get the data to confirm that they made the right investments, in particular around collaboration technologies?"

## FUTURE OUTLOOK

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Sharp's road map focuses on continuing to find those areas to simplify smart office environments while still fully supporting an open platform approach. Sharp will increasingly leverage its Synappx platform to better tie its multiple offerings together for simpler management – leveraging cloud and data analytics solutions to make offices smarter and finding places to complement and simplify the "megaplatforms" (Microsoft, Amazon, and Google) that it believes will likely "own" much of the end-user experience. Areas of value-add include further development of contactless operations, including expanding upon the support it currently offers within Synappx Go (MFP and display) and Amazon Alexa (Synappx Meeting and MFPs).

With a new mDesk experience (i.e., new capabilities of Synappx Meeting) that brings some of the Synappx value proposition to remote workers, Sharp expects to introduce more bundled solution options across its growing line of printers, Dynabook laptops, and Synappx software as a novel solution for companies trying to simplify the hybrid work environment. Sharp also has plans to increasingly leverage its strategic relationship with Foxconn (the majority shareholder of Sharp Corporation) to gain further alignment with Foxconn portfolio companies, such as Linksys and Belkin, adding more options and creativity to bundled solutions.

## ESSENTIAL GUIDANCE

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### Advice for Sharp

As mentioned previously, IDC feels that Sharp's brand awareness and overall mindshare in the extremely competitive global UC and collaboration markets are not as high as in other consumer and commercial product areas in which the company competes. In that regard, we feel Sharp must continue to develop its business alliances and channel partnerships specific to the global UC&C market.

Sharp's "simply smarter work" initiative is defined by things such as digitized documents and workflows and accelerated communications and collaboration. Meanwhile, security has been a hot topic for many vendors and customers, particularly involving some highly publicized breaches in the communications and video collaboration space in 2020. Security is typically listed by many organizations as a top challenge (if not *the* top challenge) for them in annual IDC end-user adoption surveys. As such, we think it wise for Sharp to proactively provide more clarity around its portfolio capabilities related to increased information security and safer work experiences – citing any recent customer security issues, concerns, features, and so forth it has addressed or announced recently, or how it supports security in general.

As far as overall guidance for Sharp, IDC sees the following trends shaping the global UC and collaboration markets:

- Digital enablers will drive future UC&C growth, especially cloud, voice, video, collaboration, mobility, analytics, artificial intelligence/machine learning (ML), IoT, SD-WAN, and 5G.
- COVID-19 has accelerated the transformation to digital technologies for many companies. Needs have intensified due to new workplace of the future requirements since the onset of the COVID-19 pandemic.
- Driven by crises and post-crises requirements, UC&C has become a priority area for technology investment by organizations, especially for voice, video, and collaboration technologies.
- An increasing number of work-from-home employees will be permanent in 2021 and beyond. COVID-19 has changed the way organizations think about working from home for good.
- The demand for hosted/cloud-based solutions is expanding rapidly, and there's a growing level of comfort with cloud offerings at the enterprise level. Hybrid implementations (a mix of on premises and cloud) are popular deployment options for many enterprise customers.
- Collaboration solutions with artificial intelligence, machine learning, natural language processing (NLP) capabilities, and so forth support "intelligent" solutions to enhance the workplace of the future (e.g., digital assistants, chatbots, real-time transcriptions, voice-enabled searches).
- Integrations of messaging/voice/video with business processes and apps – via APIs, communications platforms as a service (CPaaS), and ecosystems of partners – are increasingly a core requirement for organizations with more customized needs.

## LEARN MORE

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### Related Research

- *IDC's Worldwide Unified Communications and Collaboration Taxonomy, 2020-2021* (IDC #US47014520, forthcoming)
- *IDC Market Glance: Unified Communications and Collaboration, 1Q20* (IDC #US46094820, March 2020)
- *IDC Predictions 2020: Worldwide Enterprise Communications Infrastructure* (IDC #US45944320, January 2020)
- *Market Analysis Perspective: Worldwide Unified Communications and Collaboration, 2019* (IDC #US45538019, September 2019)
- *IDC MarketScape: Worldwide Unified Communications and Collaboration 2019 Vendor Assessment* (IDC #US45331319, July 2019)



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