

WINTERGREEN RESEARCH, INC.

**Telepresence Market Shares, Strategies, and Forecasts,  
Worldwide, 2010 to 2016**

**Video Sharing Increases Productivity at Every Level**



*Picture by Susie Eustis*

**MOUNTAINS OF OPPORTUNITY**

**WinterGreen Research, Inc.  
Lexington, Massachusetts**

[www.wintergreenresearch.com](http://www.wintergreenresearch.com)

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**CHECK OUT THESE KEY TOPICS**

**Collaboration**

**TelePresence**

**Video**

**Interoperability**

**LifeSize**

**MCU**

**Polycom**

**Cisco**

**Hewlett Packard**

**HP**

**RADVISION**

**Tandberg**

**Telepresence**

**Video Conferencing**

**Transmit High Quality Video Over The Internet**

**Application Able Leverage The Broadband Internet Network**

**HD Technology**

**High Definition Communication**

**High Definition TV Technology**

**Broadband Communications**

**Next Generation Video Conferencing**

**Image Presentation**

**Low k Dielectric Films**

**Lithography-Enabling Solutions**

**Gap Fill Films**

**Deposition of Silicon Oxides**

**Nano-manufacturing Technology**

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*OPPORTUNITY ABOUNDS*

WinterGreen Research, Inc.  
Lexington, Massachusetts  
www.wintergreenresearch.com

**Telepresence Market Shares, Strategies, Forecasts, Worldwide,  
2010-2016**

**LEXINGTON, Massachusetts (November 26, 2010) – WinterGreen Research announces that it has a new study on: Telepresence Market Shares and Forecasts, Worldwide, 2010-2016. Telepresence is useful as a system to support unified communications systems. Telepresence is used to create collaboration a cross geographical boundaries. The study has 602 pages and 182 tables and figures. Telepresence is considered to be any video communication system that leverages HD, high definition.**

**Virtually every video collaboration system does leverage HD these days. Telepresence supports consistent contact with a group of distributors or customers. Telepresence provides a way to keep in touch with clients and the line of business.**

**It is HD TV that provides the essence of telepresence. Broadcast quality images are available from a lot of different technologies. It is the life size screen that is so compelling.**

**Telepresence provides a consistency in the remote relationships. Significant sales calls need to be done face to face. Telepresence provides a way to supplement the face to face calls, to provide a continuity to marketing and management efforts that is not replicable in any other way. Telepresence is like a drum beat, it is regular.**

**Major drivers include increased productivity as well as cost savings. Video conferencing market drivers are indicative of significant, changing ways of implementing presence communications capability. Technology has improved working relationships, it reduces costs of doing business, and it improves responsiveness.**

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**Telepresence is next generation high definition TV videoconferencing. Telepresence leverages high definition video and high definition audio to support collaboration across distance. People located remotely can communicate effectively because of the compelling experience provided by HD TV.**

**According to Susan Eustis principal author of the study, “The bigger screens, the audio clarity, the visual clarity of telepresence are compelling. The technology components are positioned to work together to provide a more lifelike communication experience. Collaboration is facilitated by enabling sharing of documents and power point presentations as if people were in the same room.”**

**Telepresence is an emerging market segment driven by the need for geographically dispersed groups to communicate as if they are all in the same room. The telepresence solutions provide an immersive collaboration experience where remote participants are lifelike in size and voice and visual clarity. Telepresence solutions are standards-based and are available in a wide array of configurations that include full eight or 16-foot high definition cinematic views, high definition sound, and eye connect technology that places the camera at eye level for more natural face-to-face interaction.**

**The telepresence solutions are available in multiple configurations accommodating from four to 28 people. Complete telepresence solutions have list prices ranging from US\$199,999 to US\$695,000. Systems are available for as low as \$100. HD is what defines telepresence. TelePresence digital communications creates life size representations of people and documents located remotely in a conference room. Robots are being used as security systems that create remote communication experiences. TelePresence systems are enabling a network to change the way people live, work, learn and play. Telepresence brings virtual meetings to a sense of the participants being in the same room. HD TV is the technical breakthrough that makes this happens. Three HD TV screens in a conference room bring a sense of realism that is similar to being there. The reason most people travel for business is to enable ad hoc decision making. Telepresence carries that type of ad hoc decision making forward into the world of virtual meetings.**

**High quality images and sound, simplicity and tightly integrated service elements enable high quality ad hoc decision making. These features enable users to work productively without experiencing communication fatigue. They can work for longer hours due to the natural feel of the solution. As a result, a large number of existing trials have turned into production environments for telepresence. Users have increased the deployment of telepresence solution across their departmental regions, providing a global reach in many cases.**

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**Polycom has an open collaboration network strategy. This provides an open and interoperable collaboration solution that gives customers greater flexibility and investment protection for their UC environment. The worldwide revenue opportunity for telepresence and related services is anticipated to reach US \$ 6.7 billion by 2016. Markets are anticipated to grow in response to an increase in the availability of broadband communications, the inherent value of video in supporting collaboration among people located remotely from each other, and the inherent value of sustained, frequent communication when people are located remotely from each other.**

**Market growth is a result of demand for communication that benefits from controlling connectivity in a manner that will scale and is feasible for use by business units and partners. Systems are useful for implementing the supply chain economics that make the enterprise competitive. New properties of systems are evolving rapidly.**

Keywords: Collaboration, TelePresence, Video, Interoperability, LifeSize, MCU, Polycom, Cisco, Hewlett Packard, HP, Radvision, Tandberg, Telepresence, Video Conferencing, Transmit High Quality Video Over The Internet, Application Able Leverage The Broadband Internet Network, HD Technology, High Definition Communication, High Definition TV Technology, Broadband Communications, Next Generation Video Conferencing, Image Presentation, Low k Dielectric Films, Lithography-Enabling Solutions, Gap Fill Films, Deposition of Silicon Oxides, Nano-manufacturing Technology, <http://www.wintergreenresearch.com/reports/Telepresence.htm>

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## Telepresence Companies Profiled

### Telepresence Market Leaders

Polycom  
Cisco  
Hewlett Packard (HP)  
BrightCom  
D-Link  
Logitech  
Sony  
Teliris  
Vidyo

### Telepresence Market Participants

Microsoft Operating Segments	Mitel
Musion® Systems	NEC
Panasonic	Skype / eBay
Telnetix	Radvision
Telepresence Tech	VTEL
ZTE	Aethra
Avistar	Coroware
Dimdim	Digital Video Enterprises (DVE)
Emblaze-VCON	Forterra
Fujitsu	Google
Ex'ovision	IBM
Huawei	
LG-Ericsson	LG Nortel

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## Telepresence Market Strategies, Shares, And Forecasts, Worldwide, 2010 to 2016

### Report Methodology

This is the 459th report in a series of primary market research reports that provide forecasts in solar energy, robots, communications, telecommunications, the Internet, computer, software, telephone equipment, health equipment, and batteries to store energy. Automated process and significant growth potential are a priorities in topic selection. The project leaders take direct responsibility for writing and preparing each report. They have significant experience preparing industry studies. Forecasts are based on primary research and proprietary data bases.

The primary research is conducted by talking to customers, distributors and companies. The survey data is not enough to make accurate assessment of market size, so WinterGreen Research looks at the value of shipments and the average price to achieve market assessments. Our track record in achieving accuracy is unsurpassed in the industry. We are known for being able to develop accurate market shares and projections. This is our specialty.

The analyst process is concentrated on getting good market numbers. This process involves looking at the markets from several different perspectives, including vendor shipments. The interview process is an essential aspect as well. We do have a lot of granular analysis of the different shipments by vendor in the study and addenda prepared after the study was published if that is appropriate.

Forecasts reflect analysis of the market trends in the segment and related segments. Unit and dollar shipments are analyzed through consideration of dollar volume of each market participant in the segment. Installed base analysis and unit analysis is based on interviews and an information search. Market share analysis includes conversations with key customers of products, industry segment leaders, marketing directors, distributors, leading market participants, opinion leaders, and companies seeking to develop measurable market share.

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Over 200 in depth interviews are conducted for each report with a broad range of key participants and industry leaders in the market segment. We establish accurate market forecasts based on economic and market conditions as a base. Use input/output ratios, flow charts, and other economic methods to quantify data. Use in-house analysts who meet stringent quality standards. Interviewing key industry participants, experts and end-users is a central part of the study. Our research includes access to large proprietary databases. Literature search includes analysis of trade publications, government reports, and corporate literature.

Findings and conclusions of this report are based on information gathered from industry sources, including manufacturers, distributors, partners, opinion leaders, and users. Interview data was combined with information gathered through an extensive review of internet and printed sources such as trade publications, trade associations, company literature, and online databases. The projections contained in this report are checked from top down and bottom up analysis to be sure there is congruence from that perspective.

The base year for analysis and projection is 2009. With 2009 and several years prior to that as a baseline, market projections were developed for 2010 through 2016. These projections are based on a combination of a consensus among the opinion leader contacts interviewed combined with understanding of the key market drivers and their impact from a historical and analytical perspective. The analytical methodologies used to generate the market estimates are based on penetration analyses, similar market analyses, and delta calculations to supplement independent and dependent variable analysis. All analyses are displaying selected descriptions of products and services.

This research includes referencde to an ROI model that is part of a series that provides IT systems financial planners access to information that supports analysis of all the numbers that impact management of a product launch or large and complex data center. The methodology used in the models relates to having a sophisticated analytical technique for understanding the impact of workload on processor consumption and cost.

WinterGreen Research has looked at the metrics and independent research to develop assumptions that reflect the actual anticipated usage and cost of systems. Comparative analyses reflect the input of these values into models.

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The variables and assumptions provided in the market research study and the ROI models are based on extensive experience in providing research to large enterprise organizations and data centers. The ROI models have lists of servers from different manufacturers, Systems z models from IBM, and labor costs by category around the world. This information has been developed from WinterGreen research proprietary data bases constructed as a result of preparing market research studies that address the software, energy, healthcare, telecommunications, and hardware businesses.

**YOU MUST HAVE THIS STUDY**

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# Telepresence Market Shares Strategies, and Forecasts, Worldwide, 2010-2016

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## Telepresence Technology

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**SUSAN EUSTIS, PRESIDENT**, CO-FOUNDER OF WINTERGREEN RESEARCH, HAS DONE RESEARCH IN COMMUNICATIONS AND COMPUTER MARKETS AND APPLICATIONS. SHE HOLDS SEVERAL PATENTS IN MICROCOMPUTING AND PARALLEL PROCESSING. SHE HAS THE ORIGINAL PATENTS IN ELECTRONIC VOTING MACHINES. SHE HAS NEW PATENT APPLICATIONS IN FORMAT VARYING, MULTIPROCESSING, AND ELECTRONIC VOTING. SHE IS THE AUTHOR OF RECENT STUDIES OF THE SERVICES ORIENTED ARCHITECTURE, CONTENT MANAGEMENT, MID SIZE BUSINESS MIDDLEWARE, WORLDWIDE ENERGY MARKETS, SOLAR UTILITY MARKETS, SOLAR TECHNOLOGY MARKETS, THIN FILM BATTERY MARKETS, WEBCAM MARKETS, REGIONAL BELL OPERATING COMPANIES' MARKETING STRATEGIES, INTERNET EQUIPMENT, BIOMETRICS, A STUDY OF INTERNET EQUIPMENT, WORLDWIDE TELECOMMUNICATIONS EQUIPMENT, TOP TEN TELECOMMUNICATIONS, DIGITAL LOOP CARRIER, WEB HOSTING, WEB SERVICES, NANOTECHNOLOGY, AND APPLICATION INTEGRATION MARKETS. MS. EUSTIS IS A GRADUATE OF BARNARD COLLEGE.

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