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**Enterprise Streaming Media Market Opportunities,  
Strategies, and Forecasts, 2004 to 2011**

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**Enterprise Streaming Media**

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*Picture by Susie Eustis*

**MOUNTAINS OF OPPORTUNITY**

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

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**CHECK OUT THESE KEY TOPICS**

*ENTERPRISE STREAMING MEDIA MARKET SHARES*  
*ENTERPRISE STREAMING MEDIA MARKET FORECASTS*  
**Enterprise Streaming Media Driving Forces**  
**Streaming Media Enterprise Market Outlook**

Broadband Communications  
Operating System Focus On Media Delivery  
*MEDIA HOSTING*

*CHANNEL STREAMING MEDIA MODEL*  
*STREAMING MEDIA IN TELECOM NETWORKS*  
*WHAT IS STREAMING MEDIA?*

*PROTECTING THE COPYRIGHTS OF MOVIES AND MUSIC*  
*DISTRIBUTION*

*ELECTRONIC COMMERCE AND SUBSCRIPTION SERVICES*  
*INTERNET ACCESS DEVICES ENHANCE THE VALUE OF THE CHANNEL*  
*MEDIA STREAMING ENTERPRISE MARKET CATEGORIES*

**OPPORTUNITY ABOUNDS**

**WinterGreen Research, Inc.**  
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## **Enterprise Streaming Media Market Opportunities, Market Forecasts, and Market Strategies, 2004-2011**

**Digital media services and software are central to streaming media enterprise marketing and sales efforts. Streaming media is central to all aspects of Internet channel presentation.**

**Enterprises use streaming media systems to find, play, purchase and manage free and premium digital content, including music, video and games as background used for advertising.**

**The main players are Real Networks, Microsoft, and Cisco System, with Real leading the market at 63%. Real's leading products are in digital music, games, and video, and with the present domination of music and video in the streaming media market, this puts them in the leading position.**

**Microsoft is able to have a strong position in the market because they distribute their streaming media server, player, tools and digital rights management products by bundling them with the Windows operating systems at no additional cost. One in four enterprises are using some aspect of Microsoft streaming media.**

**Cisco's ECDN solution, the Cisco Application and Content Networking (ACN) System, allows organizations of all sizes to extend e-business applications to the branch. Because Cisco is not involved in the music and video side of streaming media, they are behind Real and Microsoft. However, their involvement with the business aspects still gives them a leading position in the market.**

**Music and video dominate the market. And while the business side of streaming media begins to catch up to music and video, these segments will still grow due to their popularity.**

**The market forecast for the global enterprise streaming media. Starting at \$65.7 million, the market will reach nearly \$300 million by 2011. This growth will be fueled by the continuing strength of the music and video aspect of streaming media, as well as the growth of the business aspect with enterprise conferencing, enterprise training, and enterprise channel internet.**

## Companies Profiled

### Market Leaders

Real Networks  
Microsoft

### Market Participants

Akamai  
Apple Computer  
Cycore AB  
Egenera  
Fujitsu  
Hewlett-Packard (HP)  
IBM  
Loudeye  
Meladeo  
Minerva Networks  
MusicNow  
NEC  
Sharman Networks  
Sonic Solutions  
StreamCast Networks, Inc.  
Viewpoint

Alcatel  
Cisco Systems  
Digital World Services AG  
F5 Networks  
Grokster  
Hitachi Ltd  
Liquid Digital  
Macromedia  
Metamachine, Inc.  
MusicNet  
Musiwave  
Qualcom  
Siemens AG  
Soundbase  
Sun Microsystems

# Enterprise Streaming Media Strategies and Forecasts, 2004-2011

## REPORT METHODOLOGY

THIS IS THE 247<sup>TH</sup> REPORT IN A SERIES OF MARKET RESEARCH REPORTS THAT PROVIDE FORECASTS IN COMMUNICATIONS, TELECOMMUNICATIONS, THE INTERNET, COMPUTER, SOFTWARE, TELEPHONE EQUIPMENT, HEALTH EQUIPMENT, AND ENERGY. 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. 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 PARTICIPATION 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. 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. OUR RESEARCH INCLUDES ACCESS TO LARGE PROPRIETARY DATABASES. LITERATURE SEARCH INCLUDES ANALYSIS OF TRADE PUBLICATIONS, GOVERNMENT REPORTS, AND CORPORATE LITERATURE.

**YOU MUST HAVE THIS STUDY**

# Enterprise Steaming Media Market Opportunities, Strategies, and Forecasts, 2004 to 2011

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## ABOUT THE COMPANY

**WINTERGREEN RESEARCH**, HAS A UNIQUE RESEARCH STRATEGY THAT RELATES TO IDENTIFYING MARKET TRENDS THROUGH READING AND INTERVIEWING OPINION LEADERS. BY READING THE ELECTRONIC EQUIVALENT OF 40 FEET OF PAPER, WINTERGREEN RESEARCH SENIOR ANALYSTS CAN LEARN A LOT MORE ABOUT MARKETS, A LOT FASTER THAN CAN BE LEARNED THROUGH EXPENSIVE SURVEYS AND FOCUS GROUPS. THINKING ABOUT MARKET TRENDS IS A HIGH PRIORITY AT WINTERGREEN RESEARCH. AS WITH ALL RESEARCH, THE VALUE PROPOSITION FOR COMPETITIVE ANALYSIS COMES FROM INTELLECTUAL INPUT.

IT IS A LUXURY REALLY, AVAILABLE TO ONLY A VERY FEW PEOPLE, TO BE ABLE TO GATHER INFORMATION, LOTS OF INFORMATION FROM READING MASSIVE AMOUNTS OF CONTENT, AND THEN TRYING TO MAKE SENSE OF THAT CONTENT. THE ABILITY TO THINK ABOUT MARKET TRENDS IS ENHANCED BY DOING IT OVER AND OVER FOR MANY DIFFERENT MARKETS. THAT IS WHAT WINTERGREEN RESEARCH IS ALL ABOUT: READING AND THINKING IS AN ESSENTIAL ASPECT OF COMPETITIVE ANALYSIS. TALKING TO OPINION LEADERS IS THE THIRD ESSENTIAL ASPECT OF PRODUCING GOOD, RELIABLE DATA.

**WINTERGREEN RESEARCH**, FOUNDED IN 1985, PROVIDES STRATEGIC MARKET ASSESSMENTS IN TELECOMMUNICATIONS, COMMUNICATIONS EQUIPMENT, HEALTH CARE, INTERNET AND ADVANCED COMPUTER TECHNOLOGY. INDUSTRY REPORTS FOCUS ON OPPORTUNITIES THAT EXPAND EXISTING MARKETS OR DEVELOP MAJOR NEW MARKETS. THE REPORTS ASSESS NEW PRODUCT AND SERVICE POSITIONING STRATEGIES, NEW AND EVOLVING TECHNOLOGIES, AND TECHNOLOGICAL IMPACT ON PRODUCTS, SERVICES, AND MARKETS. MARKET SHARES ARE PROVIDED. LEADING MARKET PARTICIPANTS ARE PROFILED, AND THEIR MARKETING STRATEGIES, ACQUISITIONS, AND STRATEGIC ALLIANCES ARE DISCUSSED. THE PRINCIPALS OF WINTERGREEN RESEARCH HAVE BEEN INVOLVED IN ANALYSIS AND FORECASTING OF INTERNATIONAL BUSINESS OPPORTUNITIES IN TELECOMMUNICATIONS AND ADVANCED COMPUTER TECHNOLOGY MARKETS FOR OVER 30 YEARS.

**ABOUT THE PRINCIPAL AUTHORS**

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