

Canalys announces new Telepresence Analysis service

– Quarterly shipment tracking, enterprise and channel surveys deliver valuable market analysis

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For immediate release**

Canalys today formally announced the launch of its Telepresence Analysis Worldwide service. This exciting new service builds upon the company's highly regarded Unified Communications Analysis programme by providing market intelligence and analysis on the fast growing video collaboration market. It monitors the evolution from desktop and modular standard-definition ISDN and IP systems to telepresence, modular and desktop high-definition systems aimed at replicating in-person meetings. It also provides insight into channel trends and enterprise behaviour.

“The emergence of telepresence and other high-definition technologies is finally helping to deliver on the promises made around video collaboration,” said Matthew Ball, Canalys senior analyst and head of the service. “The current state of the global economic environment, high oil prices and increasing concerns over carbon emissions are all contributing to a growing need within enterprises to raise employee productivity and lower operational costs through reduced business travel. Telepresence can help fulfil this need by providing an enhanced user experience over traditional standard-definition solutions.”

The telepresence market is at an early stage of development. Fewer than 1,500 telepresence rooms were commercially installed worldwide at the end of 2007, but this is expected to expand rapidly over the next five years to reach almost 100,000 by 2012. The introduction of lower cost adaptive and personal telepresence solutions will complement immersive offerings and help make the technology economically feasible for more businesses. The overall deployment of group video collaboration units, including telepresence and modular room-based systems, as well as executive desktop devices, is expected to increase from just under 1.1 million in 2007 to more than 2.5 million by 2012.

The value of telepresence solution sales alone is forecast to be worth \$3.5 billion by 2012. Associated managed services will present significant additional revenue opportunities for the channel, as companies seek to reduce the complexity and cost of managing their own deployments. Companies like Nortel, AT&T, BT, Verizon, Tata Communications, Glowpoint, Masergy and HP are already developing services.

Ball continued, “Leading standards-based video collaboration vendors like Polycom and Tandberg are developing their portfolios to capitalise on this opportunity. Cisco and HP have entered the market,

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Page 1 of 2

generating considerable media attention with immersive and adaptive offerings. These vendors are joining leading telepresence specialists, such as Teliris and DVE, in targeting a wider range of enterprise customers as well as governments and specific verticals.”

Key deliverables of the new service include a series of issue-led reports, quarterly market-sizing databases that detail the uptake of telepresence and high-definition solutions, five-year market forecasts, results and analysis of enterprise and channel opinion surveys, and unlimited analyst enquiry to enable clients to dive deeper into their specific areas of interest. Clients of the service may also suggest survey topics to test new product, marketing and channel initiatives. These deliverables are supplemented by a quarterly trends presentation and rapid analysis of major industry developments.

“Video collaboration is an important element of unified communications. Its use has been steadily gaining traction in businesses outside of the established key vertical sectors like healthcare and education. This will accelerate over the next 10 years with the influx of a next-generation, Web 2.0 literate workforce that has become accustomed to video collaboration from an early age. Integrating this technology with other forms of communication and collaboration, and into business processes, as well as ensuring a high standard of user experience, are all essential to achieve the widest possible adoption,” Ball added.

About Canalys

Canalys specialises in delivering high quality market data, analysis and advice to the world’s leading technology vendors. It is recognised as a key provider of continuous advisory services and confidential custom projects for marketing managers and strategists within blue-chip IT, telecoms, navigation and consumer electronics companies. It has unrivalled expertise in routes to market for all kinds of high technology products and services in the consumer, SMB and large enterprise segments, and provides worldwide market data and trends analysis.

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Canalys Americas
Suite 280
Town & Country Village
855 El Camino Real
Palo Alto, CA 94301, US

T: +1 650 450 7191

Canalys APAC
Republic Plaza 2
#18 – 27
9 Raffles Place
048619, Singapore

T: +65 6823 6828

Canalys EMEA
Diddenham Court
Lambwood Hill
Grazeley, Reading
RG7 1JS, UK

T: +44 118 984 0520

W: www.canalys.com