

## THE RISING OF ENGLISH VIDEOCONFERENCING LESSONS IN SOUTH KOREAN SCHOOLS

### Asia Pacific Market Insights

*Frost & Sullivan's commentary on the Asia Pacific ICT industry, addressing opportunities, best practices, and major events*



## South Korean Videoconferencing Market

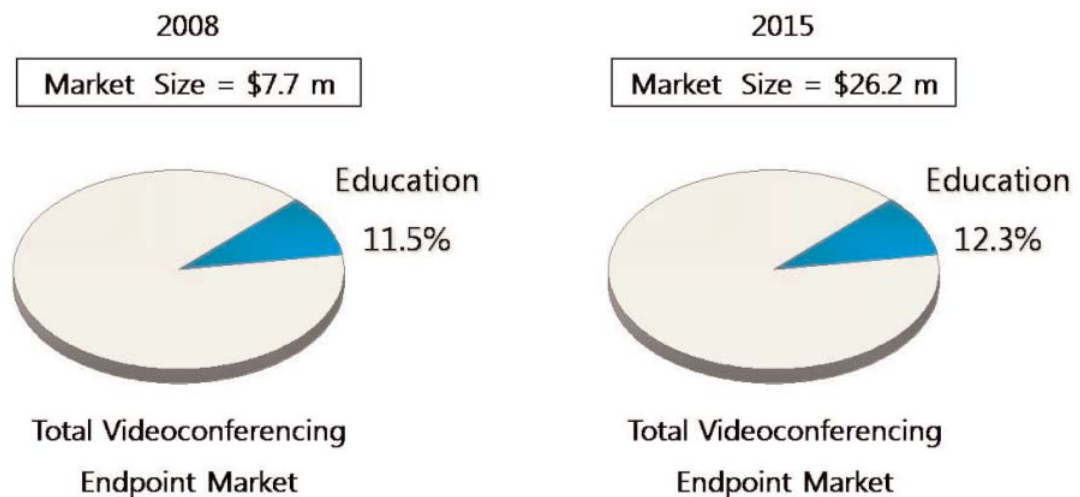
The South Korean videoconferencing endpoint market was valued at \$7.7 million in 2008, with a growth rate of 18.7 percent. By 2015, the market is expected to reach a size of \$26.2 million, experiencing a strong CAGR of 19.1 percent

The key verticals of the South Korean videoconferencing market have been the government and corporate market, accounting for more than 83 percent of the total market. South Korean government has been an early adopter of videoconferencing solutions as it drives the latest IT technology refresh. Also the focus on reducing the cost of business travel is a major benefit that ensures the participation of the corporate market. Such a trend has been evidently witnessed by the major videoconferencing multinational vendors such as Polycom and Tandberg.

## Opportunities in Education Vertical

Even though the contribution of the education sector to the overall South Korean videoconferencing market is relatively smaller in size compared to the key verticals, it has seen a strong rise last year, as it is seeing new opportunities in the local public schools. The education vertical is also expected to steadily increase its contribution to the overall market.

In South Korea, English is generally regarded as one of the most important subjects and are usually compulsory. The emphasis of English has continuously been increasing and the latest trend shows that public schools are deploying videoconferencing solutions for the sole purpose of learning English in Classrooms. With this deployment, English lessons are held in the videoconferencing classrooms, providing real time communication with a native English teacher on one end to give dialogue based lessons to the students on the other end.



It is also worth noting that South Korea was the first country in the world to have high-speed internet access in every elementary and secondary school, which shows the high IT dedication the public schools are willing to make in supporting their students.

Evidently, in 2008, the Ministry of Education, Science and Technology in South Korea, announced their plan to drive the use of videoconferencing in public schools. The plan is to expand the number of English Experience Classrooms in elementary and secondary schools, enabling two way live communication between a native English speaking teacher and the students in the classrooms. According to the Ministry, there are currently 189 elementary schools and 1806 secondary schools with such

system. The plan is to add another 1730 elementary and 2336 secondary schools. The Ministry promises to cover every elementary school by 2011 and ultimately cover all the secondary schools nationwide. Such focused scheme and support of the Ministry is expected to drive strong growth of the South Korean videoconferencing market in the education sector.

## Current Deployment Status

The key videoconferencing market players in South Korea, namely, Polycom and Tandberg, have already witnessed the increasing interest for videoconferencing solutions from the South Korean public schools.

In November 2008, Samyang Data System announced the deployment of Polycom's videoconferencing solution at Ansan Gangseo High School and the on-going deployments in Bundang area, including both elementary and secondary schools. The plan is to leverage the reference experiences gained from deploying videoconferencing solutions to various local universities, in order to capture the trend of emerging English classroom market.

In October 2008, Polycom's solutions have also been deployed at Daejeon Educational Information Institute and six public elementary schools. The deployment consisted of HD solutions HDX 8000, real time media conferencing platform RMX 2000 and virtual studio solution 'People On Contents. As Daejeon Metropolitan Office of Education has announced to expand the coverage, more primary and secondary schools within the region are expected to adapt to the fast growing trend.

Tandberg is also expecting the demand of videoconferencing English classrooms to dramatically increase in 2009 and accordingly, has been putting more focus on the education sector. During 2008, Tandberg has also made successful deployments to number of primary schools in Daejeon city. As Daejeon city is showing high level of interest in the development of videoconferencing classrooms, Tandberg expects to see much more gains within the region.

## Looking forward

During 2008, the videoconferencing market has witnessed the growth of new prospects in the South Korean education market. As the Ministry of Education, Science and Technology has put new schemes to increase the usage of videoconferencing in public schools, the South Korean market will see various new follow up references nationwide. Especially within the Daejeon region, where the Metropolitan Office of Education has plans to actively increase the coverage of videoconferencing lesson classrooms, the competition between the multinational videoconferencing vendors is likely to be fierce. In the upcoming years, as Daejeon city successfully meets its target, the on-going trend would become much stronger in various cities nationwide where the number of participants of public schools would continue to grow. Also, as new deployments are generally of HD solutions, the growth of such trend would support for faster pace towards full HD transition in the market. Education vertical is yet to be considered as an opportunistic market for telepresence solution. However as demand for telepresence grows in overall market, the education vertical is also expected to make deployments.

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