



MEDICAL DEVICES



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CHEMICALS



FOOD & BEVERAGE



ELECTRONICS

Analysis of Asia Pacific Hosted Email Market

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F R O S T & S U L L I V A N



Market
Engineering

Analysis of the Hosted Email Market

Asia Pacific

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Executive Summary




















Executive Summary

- The evolution of cloud computing segment has taken place in Asia Pacific, driven by both supplier offerings and customer requirements. Hosted email, as part of the infrastructure as a service (IaaS) offerings, benefits from this revolutions in terms of stability, scalability and security.
- The continual growing and improvement of broadband services, both wireline and wireless, have become the one of the crucial drivers for the uptake of hosting email services across the region in 2010.
- Hybrid models of both on-premise software and Web app remain as the most prevalent manner in mid-to-large business among mature markets. This trend is predicted to continue in the near future, in line with the arising interest on private cloud among these enterprises.
- The key vendors in this market segment, namely Microsoft, IBM, Google, and VMware (Zimbra), have been strongly promoting to their customers and their partners across the region for adopting online email services in 2010. while the key local Internet Service Providers (ISP) focused on the customer retention by providing additional services with minimal charges.

Executive Summary – Market Engineering Measurements

Market Overview

Hosted Email Market: Asia Pacific, 2010

 Market Stage	 Market Revenues	 Market Units/Volume	 Average Price Per Year	 Market Size at End of Forecast Period
<p>Growth</p>	<p>\$xxx.x M </p> <p>(2010)</p>	<p>x.x M </p> <p>(2010)</p>	<p>\$xx-xx </p>	<p>\$xxx.x M </p> <p>(2017)</p>
 Base Year Market Growth Rate	 7-year Forecast Market Growth Rate	 Customer Price Sensitivity	 Degree of Technical Change	 Market Concentration
<p>xx.x% </p>	<p>xx.x% </p> <p>(CAGR)</p>	<p>X </p> <p>(scale:1 [low] to 10 [High])</p>	<p>X </p> <p>(scale:1 [low] to 10 [High])</p>	<p>xx.x% </p> <p>(% of market share held by top 3 companies)</p>

Decreasing  Stable  Increasing 

Note: All figures are rounded. The base year is 2010.

Definitions and Scope – Hosted Email

Definitions

Hosted Email is an Internet hosting service whereby the Email servers system is hosted by a service provider, and the email is delivered through the cloud and can be running either on a Web browser or an email client.

Three Types of Hosting Services

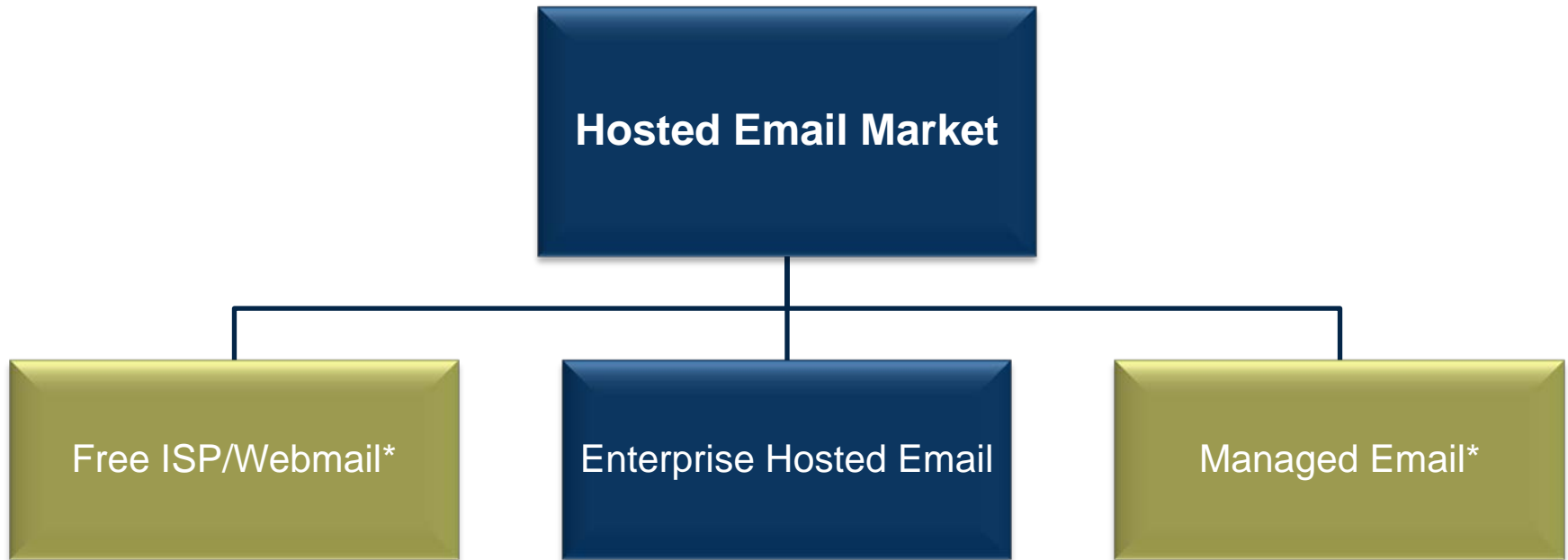
- Free ISP/Webmail, such as Google Gmail, Microsoft Live Hotmail, and Yahoo! Mail, provides Web-based free email accounts mainly for individuals and small businesses.
- Enterprise hosted email offers a wide range of business communication features related to email functions, such as shared calendar, directory, and mobile push emails.
- Managed email service is mainly provided by the outsourcing IT service providers, which typically helps customers manage their own IT infrastructures on premise or remotely, rather than hosting the email servers in their own data centers.

Two Hosting Models

- Multi-tenanted hosting or shared hosting, that is same infrastructure is being used to serve multiple customers.
- Dedicated hosting, that is the infrastructure is dedicated to one customer.

Market Segmentation

Hosted Email Market: Market Segmentation (Asia Pacific), 2010



*Not covered in this study

The only segment covered in this study, which refers to the paid hosted email used in business environment