

THE RADICATI GROUP, INC.
A TECHNOLOGY MARKET RESEARCH FIRM

EMEA Hosted Email Market, 2008-2012

<http://www.radicati.com>

Cost – US \$3,000 by company P.O. or \$2,500 by credit card

A comprehensive study of the European Hosted Email Market, including the following segments:

- Hosted Business Email Providers
- Managed Business Email Providers
- ISP/Webmail Providers

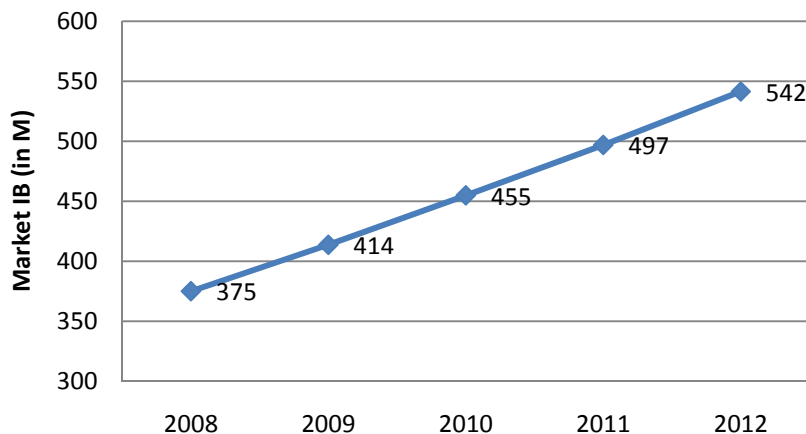
Provides –Installed Base and Revenue Market Share, Four-Year Forecast, and Key Market Trends.

Separate Country Breakouts for:

- UK
- Germany
- France
- Italy
- Spain
- Rest of Europe

In-depth analysis of leading market players in Europe: *Arsys, Apptix, BT Group, Bluetie, Cobweb, Cortado, Jet Multimedia, Mamut/active24, Orange Business Services, Utica, Zimbra, Zoho, and more.*

This report is intended for Organizations, Providers, and Investors who need to make informed decisions about the European Hosted Email market.



EMEA Hosted Email Market IB Forecast, 2008 - 2012

Headquarters: 595 Lytton Avenue
Palo Alto, CA 94301
phone: (650) 322-8059
fax: (650) 322-8061

Europe: 29E Fitzjohns Avenue
London NW3 5JY, UK
phone: +44 (0) 20 7794-4298
fax: +44 (0) 20 7431-9375

TABLE OF CONTENTS

SCOPE	9
EXECUTIVE SUMMARY	13
CHAPTER ONE – MARKET ANALYSIS	17
1.1 MARKET DEFINITION	18
1.2 MARKET SEGMENTATION	19
1.3 MARKET ANALYSIS	21
1.4 ISP/WEBMAIL KEY TRENDS AND ANALYSIS	23
1.4.1 MARKET SHARE	24
1.4.2 FORECAST	25
1.5 HOSTED BUSINESS EMAIL KEY TRENDS AND ANALYSIS	27
1.5.1 MARKET SHARE	29
1.5.2 FORECAST	30
1.5.3 FOCUS : MICROSOFT AND HOSTED BUSINESS EMAIL	32
1.6 MANAGED BUSINESS EMAIL KEY TRENDS AND ANALYSIS	38
CHAPTER TWO – BREAKOUT BY COUNTRY	41
2.1 UK	42
2.2 FRANCE	44
2.3 SPAIN	46
2.4 GERMANY	48
2.5 ITALY	50
2.6 REST OF EUROPE (ROE)	52
CHAPTER THREE – SERVICE PROVIDERS	55
3.1 APPTIX	56
3.2 ARSYS	59
3.3 BLUETIE	61
3.4 BT GROUP	64
3.5 COBWEB	66
3.6 CORTADO	69
3.7 JET MULTIMEDIA	72
3.8 MAMUT / ACTIVE24	75
3.9 ORANGE BUSINESS SERVICES	78
3.10 UTICA	81
3.11 ZIMBRA	84
3.12 ZOHO.COM	87

List of Figures

FIGURE 1: EMEA HOSTED EMAIL MARKET IB FORECAST, 2008 - 2012 15
FIGURE 2: EMEA HOSTED EMAIL MARKET IB, 2008-2012 (M) 22
FIGURE 3: EMEA ISP/WEBMAIL IB MARKET SHARE, 2008 25
FIGURE 5: EMEA HOSTED BUSINESS EMAIL IB MARKET SHARE, 2008..... 30
FIGURE 6: EMEA HOSTED BUSINESS EMAIL MARKET IB, 2008-2012 (M) 31
FIGURE 7: EMEA HOSTED BUSINESS EMAIL MARKET REVENUE FORECAST, 2008-2012 (M €). 31
FIGURE 8: EMEA MANAGED BUSINESS EMAIL MARKET IB FORECAST, 2008-2012 (M) 39
FIGURE 9: UK HOSTED EMAIL MARKET IB FORECAST, 2008-2012 (M)..... 42
FIGURE 10: FRENCH HOSTED EMAIL MARKET IB FORECAST, 2008-2012 (IN M) 44
FIGURE 11: SPANISH HOSTED EMAIL MARKET IB FORECAST, 2008-2012 (IN M) 46
FIGURE 12: GERMAN HOSTED EMAIL MARKET IB FORECAST, 2008-2012 (IN M)..... 48
FIGURE 13: ITALIAN HOSTED EMAIL MARKET IB FORECAST, 2008-2012 (IN M)..... 50
FIGURE 14: ROE HOSTED EMAIL MARKET IB FORECAST, 2008-2012 (IN M)..... 52

List of Tables

TABLE 1: EMEA HOSTED EMAIL MARKET IB, 2008-2012 (M)	21
TABLE 2: EMEA ISP/WEBMAIL IB MARKET SHARE, 2008.....	24
TABLE 3: EMEA ISP/WEBMAIL MARKET IB FORECAST, 2008-2012 (M).....	25
TABLE 4: EMEA HOSTED BUSINESS EMAIL IB MARKET SHARE, 2008	29
TABLE 5: EMEA HOSTED BUSINESS EMAIL MARKET IB AND REVENUE FORECAST, 2008-2012 (M) 31	
TABLE 6: EMEA MICROSOFT HOSTED EXCHANGE MAPI IB MARKET SHARE, 2008.....	36
TABLE 7: EMEA HOSTED EXCHANGE IB FORECAST, 2008-2012	36
TABLE 8: EMEA MANAGED BUSINESS EMAIL MARKET IB FORECAST, 2008-2012 (M).....	38
TABLE 9: UK HOSTED EMAIL MARKET IB FORECAST, 2008-2012 (IN M)	42
TABLE 10: UK ISP/WEBMAIL IB MARKET SHARE (2008).....	43
TABLE 11: UK HOSTED BUSINESS EMAIL IB MARKET SHARE (2008)	43
TABLE 12: FRENCH HOSTED EMAIL MARKET IB FORECAST, 2008-2012 (M).....	44
TABLE 13: FRENCH ISP/WEBMAIL IB MARKET SHARE (2008)	45
TABLE 14: FRENCH HOSTED BUSINESS EMAIL IB MARKET SHARE (2008).....	45
TABLE 15: SPANISH HOSTED EMAIL MARKET IB FORECAST, 2008-2012 (IN M)	46
TABLE 16: SPANISH ISP/WEBMAIL IB MARKET SHARE (2008)	47
TABLE 17: SPANISH HOSTED BUSINESS EMAIL IB MARKET SHARE (2008)	47
TABLE 18: GERMAN HOSTED EMAIL MARKET IB FORECAST, 2008-2012 (M).....	48
TABLE 19: GERMAN ISP/WEBMAIL IB MARKET SHARE (2008).....	49
TABLE 20: GERMAN HOSTED BUSINESS EMAIL IB MARKET SHARE (2008).....	49
TABLE 21: ITALIAN HOSTED EMAIL MARKET IB FORECAST, 2008-2012 (IN M).....	50
TABLE 22: ITALIAN ISP/WEBMAIL IB MARKET SHARE (2008)	51
TABLE 23: ITALIAN HOSTED BUSINESS EMAIL IB MARKET SHARE (2008).....	51
TABLE 24: ROE HOSTED EMAIL MARKET IB FORECAST, 2008-2012 (IN M)	52
TABLE 25: ROE ISP/WEBMAIL IB MARKET SHARE (2008).....	53
TABLE 26: ROE HOSTED BUSINESS EMAIL IB MARKET SHARE (2008).....	53