



THE RADICATI GROUP, INC.

A TECHNOLOGY MARKET RESEARCH FIRM

1900 EMBARCADERO ROAD, SUITE 206. • PALO ALTO, CA 94303

TEL. 650 322-8059 • FAX 650 322-8061

Asia Pacific Hosted Email Market, 2010-2014

Editor: Sara Radicati, PhD; Principal Analyst: Quoc Hoang

SCOPE

This study provides an analysis of the Hosted Email market in Asia Pacific (APAC) in 2010 and its forecasted growth through 2014. It includes current market trends, market size, installed base market share by provider, and four-year forecasts. Detailed breakouts are provided for the top six Asia Pacific markets – China, India, Japan, Australia, South Korea, Singapore - as well as Rest of Asia (RoA).

The Hosted Email market is categorized by three segments: ISP/Webmail, Hosted Business Email, and Managed Email. The first two segments are discussed in detail in this report, the latter, which comprises mostly systems integration and consulting projects is not.

Microsoft is identified as a key player in the Hosted Email market. A section is dedicated to Microsoft and a four-year forecast is provided for Microsoft Hosted Exchange mailboxes.

All revenue numbers are expressed in \$USD unless stated differently.

METHODOLOGY

The information and analysis in this report is based on primary research conducted by the Radicati Group, Inc. It consists of information collected from hosting providers, global corporations and users via interviews and surveys.

Secondary research sources have also been used, where appropriate, to cross-check the information collected. These include company annual reports and market size information from various market segments of the computer industry.

EXECUTIVE SUMMARY

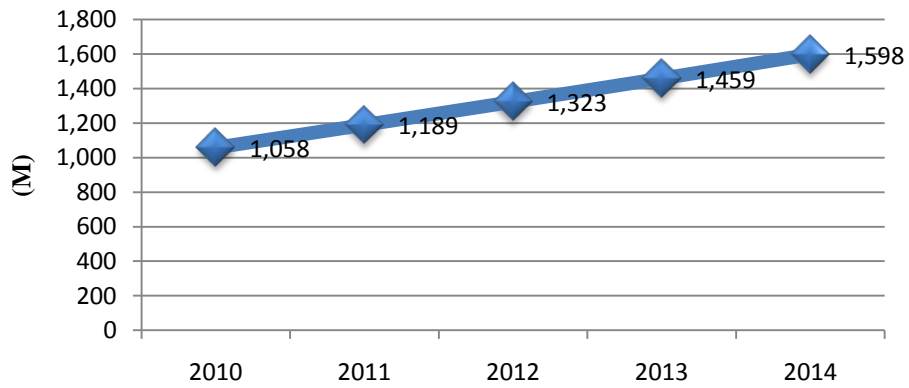
- This study provides an analysis of the Hosted Email market in Asia Pacific. This report does not look into on-premises email solutions, which are deployed by organizations on-site. Separate breakdowns including installed base, four-year forecasts and provider market share are provided for the top six markets in the region: China, India, Japan, Australia, South Korea, Singapore, as well as for the Rest of Asia (RoA).
- The report categorizes the Hosted Email market into three key segments:
 - **ISP/Webmail:** This segment focuses on advertising driven, and thus free, email solutions. These email solutions are used only by consumers. The most popular email solutions in this category are *Microsoft Windows Live Hotmail, Google Gmail and Yahoo! Mail*.
 - **Hosted Business Email:** This segment offers professional email solutions to a wide range of businesses (from SOHO to Corporate). Typically this type of solution is paid for, does not have advertising, is linked to the company domain name, and offers advanced business features such as shared calendar, contacts, and mobile ‘push’ email. Popular Hosted Business Email providers include *263 Network Communications, Bhartu Airtel, China Telecom, Google, GMO, Hi-China, IJJ, Melbourne IT, Microsoft, NetEase, NTT Communications, Optus, Otuska Shokai, PacNet Internet, Rediff, SingTel, StarHub, Tata Communications, and Telstra*.
 - **Managed Business Email:** This segment includes large consulting and systems integration organizations that offer a wide array of outsourced IT services. These providers typically offer high levels of customization that require professional services and consulting. In many cases, Managed Email

providers do not host email at their own data centers, but rather manage the customer's on-site messaging systems remotely. This segment is not analyzed in depth in this report, but is included here for the sake of completeness.

Popular Managed Business Email providers include *HP, IBM Global Services, and Tata Communications*.

- The Asia Pacific Hosted Email market is characterized by the following key trends:
 - The growing adoption of Broadband Internet, both fixed and mobile, continues to drive the adoption of email services throughout the Asia Pacific region.
 - The development of Instant Messaging (IM) and Social Networking and their pervasiveness on mobile phones have reduced consumers' reliance on email in the region.
 - The Hosted Business Email market in the Asia Pacific region currently lags behind North America and Europe in terms of adoption, however it has lots of potential for growth, especially as more and more SOHOs and SMBs in the region become more comfortable with conducting business over the Internet.
 - Microsoft has been aggressively promoting its Microsoft Hosted Exchange services throughout Asia Pacific as part of its overall direction towards the cloud for several years now.
- The Hosted Email market, including all segments, in Asia Pacific will reach 1.1 billion mailboxes by year-end 2010. By year-end 2014, the Hosted Email market in Asia Pacific will reach 1.6 billion mailboxes. This represents an average annual growth rate of 11% over four years.

APAC Hosted Email Installed Base, 2010-2014



APAC Hosted Email Market IB Forecast, 2010 - 2014

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