

THE RADICATI GROUP, INC.  
A TECHNOLOGY MARKET RESEARCH FIRM

## ***Hosted Email and Collaboration Market, 2012-2016***

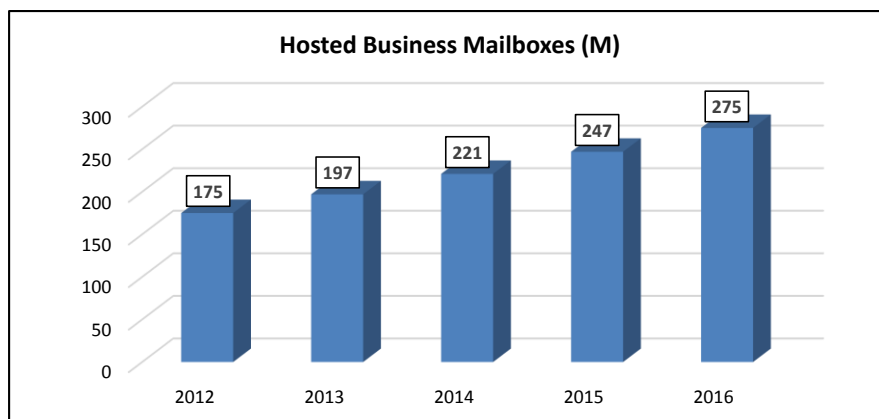
<http://www.radicati.com>

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

A comprehensive analysis of the *Hosted Email and Collaboration* market covering both business and consumer adoption, includes:

- ☒ **Hosted Business Email** – Installed Base and Revenue Market Share by Provider, Four-Year Forecasts, Breakouts by Region, Business Size, and Platform Type.
- ☒ **Microsoft Hosted Exchange** – Installed Base and Revenue Market Share, Four-Year Forecasts, and Breakouts by Region and Business Size.
- ☒ **Google Apps** – Installed Base and Revenue Four-Year Forecasts, and Breakouts by Version, Region and Business Size.
- ☒ **Consumer and ISP/Webmail** – Installed Base Market Share by Provider, Four-Year Forecasts, and Breakouts by Region.
- ☒ In-depth analysis of leading business providers: *AppRiver, Apttix, Ceryx, Google, IBM, Intermedia, Microsoft, NaviSite, Rackspace, USA.NET, and more*; as well as consumer providers: *AOL, Google, Microsoft and Yahoo!*.

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



Headquarters: 1900 Embarcadero Road, Ste. 206  
Palo Alto, CA 94303  
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

<b>SCOPE .....</b>	<b>6</b>
<b>METHODOLOGY .....</b>	<b>7</b>
<b>EXECUTIVE SUMMARY .....</b>	<b>8</b>
<b>CHAPTER ONE – MARKET ANALYSIS .....</b>	<b>10</b>
<b>1.1 MARKET DEFINITION.....</b>	<b>11</b>
<b>1.2 MARKET SEGMENTATION .....</b>	<b>15</b>
<b>1.3 HOSTED BUSINESS EMAIL AND COLLABORATION TRENDS AND ANALYSIS.....</b>	<b>18</b>
1.3.1 HOSTED BUSINESS EMAIL AND COLLABORATION EVALUATION CRITERIA .....	23
1.3.2 HOSTED BUSINESS EMAIL AND COLLABORATION MARKET SHARE.....	25
1.3.3 HOSTED BUSINESS EMAIL AND COLLABORATION FORECAST .....	30
1.3.4 HOSTED BUSINESS EMAIL AND COLLABORATION BREAKOUT BY REGION .....	32
1.3.5 HOSTED BUSINESS EMAIL AND COLLABORATION BREAKOUT BY BUSINESS SIZE .....	34
1.3.6 HOSTED BUSINESS EMAIL AND COLLABORATION INSTALLED BASE BY PLATFORM TYPE .....	36
<b>1.4 MICROSOFT HOSTED EXCHANGE .....</b>	<b>38</b>
1.4.1 MICROSOFT HOSTED EXCHANGE TRENDS AND ANALYSIS .....	39
1.4.2 MICROSOFT HOSTED EXCHANGE PROVIDER EVALUATION CRITERIA .....	43
1.4.3 MICROSOFT HOSTED EXCHANGE MARKET SHARE .....	46
1.4.4 MICROSOFT HOSTED EXCHANGE FORECAST .....	49
1.4.5 MICROSOFT HOSTED EXCHANGE BREAKOUT BY REGION .....	51
1.4.6 MICROSOFT HOSTED EXCHANGE BREAKOUT BY BUSINESS SIZE.....	52
<b>1.5 GOOGLE APPS .....</b>	<b>54</b>
1.5.1 GOOGLE APPS TRENDS AND ANALYSIS .....	56
1.5.2 GOOGLE APPS FORECAST .....	58
1.5.3 GOOGLE APPS BREAKOUT BY REGION.....	60
1.5.4 GOOGLE APPS BREAKOUT BY BUSINESS SIZE.....	61
<b>1.6 MANAGED BUSINESS EMAIL TRENDS AND ANALYSIS .....</b>	<b>63</b>
1.6.1 MANAGED BUSINESS EMAIL MARKET SIZE AND FORECAST .....	65
1.6.2 MANAGED BUSINESS EMAIL BREAKOUT BY REGION .....	66
1.6.3 MANAGED BUSINESS EMAIL BREAKOUT BY BUSINESS SIZE .....	67
1.6.4 MANAGED BUSINESS EMAIL INSTALLED BASE BY PLATFORM .....	68
<b>1.7 CONSUMER EMAIL TRENDS AND ANALYSIS.....</b>	<b>69</b>
1.7.1 CONSUMER EMAIL MARKET SHARE.....	72
1.7.2 CONSUMER EMAIL FORECAST .....	77
1.7.3 CONSUMER EMAIL BREAKOUT BY REGION .....	78
<b>CHAPTER TWO – SERVICE PROVIDERS.....</b>	<b>80</b>
<b>HOSTED BUSINESS EMAIL AND COLLABORATION PROVIDERS .....</b>	<b>81</b>
APPRIVER .....	82
APPTIX.....	88

CERYX .....	97
GOOGLE .....	102
IBM .....	111
INTERMEDIA.....	118
MICROSOFT.....	125
NAVISITE.....	137
RACKSPACE .....	143
USA.NET, A PERIMETER E-SECURITY BRAND .....	150
ADDITIONAL HOSTED BUSINESS EMAIL PROVIDERS .....	157
<b>CONSUMER EMAIL PROVIDERS .....</b>	<b>162</b>
AOL. ....	163
GOOGLE.....	168
MICROSOFT.....	173
YAHOO! .....	180

## LIST OF FIGURES

FIGURE 1: HOSTED EMAIL AND COLLABORATION MARKET SEGMENTATION.....	16
FIGURE 2: HOSTED BUSINESS EMAIL AND COLLABORATION — IB MARKET SHARE, 2012.....	29
FIGURE 3: HOSTED BUSINESS EMAIL AND COLLABORATION — REVENUE MARKET SHARE, 2012 .....	29
FIGURE 4: HOSTED BUSINESS EMAIL AND COLLABORATION — REVENUE FORECAST, .....	31
FIGURE 5: HOSTED BUSINESS EMAIL AND COLLABORATION — IB BY REGION, 2012 & 2016 .....	33
FIGURE 6: HOSTED BUSINESS EMAIL AND COLLABORATION — IB BY BUSINESS SIZE, 2012 & 2016 .....	35
FIGURE 7: MICROSOFT HOSTED EXCHANGE — IB MARKET SHARE, 2012.....	48
FIGURE 8: MANAGED BUSINESS EMAIL — IB BY REGION, 2012 & 2016 .....	66
FIGURE 9: MANAGED BUSINESS EMAIL — IB BY BUSINESS SIZE, 2012 & 2016 .....	67
FIGURE 10: CONSUMER EMAIL — IB MARKET SHARE, 2012.....	76
FIGURE 11: CONSUMER EMAIL — IB BY REGION, 2012 & 2016 .....	79

## LIST OF TABLES

TABLE 1: HOSTED EMAIL AND COLLABORATION MARKET — WORLDWIDE IB (I.E. MAILBOXES), 2012-2016	19
TABLE 2: WORLDWIDE ON-PREMISES VS. HOSTED MAILBOX FORECAST, 2012-2016 .....	17
TABLE 3: HOSTED BUSINESS EMAIL AND COLLABORATION — IB & REVENUE MARKET SHARE, 2012.....	28
TABLE 4: HOSTED BUSINESS EMAIL AND COLLABORATION — IB & REVENUE FORECAST, 2012-2016.....	30
TABLE 5: HOSTED BUSINESS EMAIL AND COLLABORATION — IB BY PLATFORM TYPE, 2012-2016.....	37
TABLE 6: MICROSOFT HOSTED EXCHANGE — IB AND REVENUE MARKET SHARE, 2012 .....	47
TABLE 7: MICROSOFT HOSTED EXCHANGE — IB MARKET SHARE, 2012-2016.....	49
TABLE 8: MICROSOFT HOSTED EXCHANGE — IB & REVENUE FORECAST, .....	50
TABLE 9: MICROSOFT HOSTED EXCHANGE — IB BY REGION, .....	51
TABLE 10: MICROSOFT HOSTED EXCHANGE — IB BY BUSINESS SIZE, .....	53
TABLE 11: GOOGLE APPS — IB MARKET SHARE, 2012-2016.....	58
TABLE 12: GOOGLE APPS — IB & REVENUE FORECAST, 2012-2016.....	59
TABLE 13: GOOGLE APPS — BREAKOUT BY REGION, 2012-2016.....	60
TABLE 14: GOOGLE APPS — BREAKOUT BY REGION, 2012-2016.....	62
TABLE 15: MANAGED BUSINESS EMAIL — IB FORECAST, 2012-2016.....	65
TABLE 16: MANAGED BUSINESS EMAIL — IB BY PLATFORM, 2012-2016.....	68
TABLE 17: CONSUMER EMAIL — IB MARKET SHARE, 2012 .....	75
TABLE 18: CONSUMER EMAIL — IB FORECAST, 2012-2016.....	77

## About The Radicati Group, Inc.

The Radicati Group is a leading technology research and advisory firm focused on all aspects of email, security, email archiving, regulatory compliance, wireless technologies, web services, instant messaging, unified communications, social networking, and more. The company provides both quantitative and qualitative information, including detailed market size, installed base and forecast information on a worldwide basis, as well as detailed country breakouts.

The Radicati Group works with corporate organizations to assist in the selection of the right products and technologies to support their business needs, as well as with vendors to define the best strategic direction for their products. We also work with investment firms on a worldwide basis to help identify new investment opportunities.

The Radicati Group, Inc. is headquartered in Palo Alto, CA, with offices in London, UK.

**ORDER FORM** *To order, please fill out the following form and return it to The Radicati Group at the address or fax shown on the front.*

<b>Hosted Email and Collaboration Market, 2012-2016</b>	
<b>Name:</b>	<b>Company:</b>
<input type="checkbox"/> <b>P.O. \$3,000</b> <i>Note: We will need the actual P.O. paperwork from your Purchasing Department before we can fill the orders.</i>	
<input type="checkbox"/> <b>Credit Card \$2,500</b>	
<input type="checkbox"/> VISA <input type="checkbox"/> MasterCard <input type="checkbox"/> Amex	
<b>Card Number:</b>	<b>Exp. Date:</b>
<b>Signature:</b>	
<b>Address:</b>	
City, State, Zip:	
Country:	
<i>Please indicate street address - NO P.O. BOX please!</i>	
<b>Phone:</b>	<b>Email:</b>