

EXECUTIVE OVERVIEW

MASS-MARKET HOSTING

FALL 2012

IIR | INTERNET
INFRASTRUCTURE
SERVICES



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REPORT SNAPSHOT

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ABOUT THIS REPORT

451 Research considers the entire realm of hosted infrastructure services – from shared, dedicated and virtual private server hosting to CDN, Web hosting and hosted application service providers – the mass market for IT infrastructure. The focus of this report is on the website and application hosting sector, not other kinds of IT infrastructure, although the lines between these sectors is rapidly blurring.

In this report, 451 Research analyzes the sector's most important developments, and assesses their impact on all parts of the value chain and the many tiers of the competitive landscape. We also take detailed looks at some of the key trends in the areas of product development, marketing, strategy and M&A.

This report provides snapshots of several leading and emerging players as we try to understand the dynamism of the sector and determine which companies will prevail over the long term. Finally, we try to provide perspective on where the sector is headed, while taking a retrospective look to identify some of the root causes of recent successes and failures in the sector.

COMPANIES INCLUDED IN THIS REPORT

1&1 Internet	cPanel	GSI Hosting
100TB.com	Cracked.com	Heart Internet
2e2 Group	Dada SpA	Hetzner Online
8 to infinity	Datapipe	HgCapital
AAPT	DataXenter	HickoryTech
Adobe Systems	DediPower Managed Hosting	Host Europe
Alchemy Communications	Deluxe	Hostbed
Amazon	Demand Media	Hosted Solutions
AppDirect	Deutsche Telekom	HostGator
Apple	Donuts Inc	Hosting.com
Apptix	Dreamhost	Hostopia.com
Arsys Internet	Dropbox	Hostway
Aruba SpA	EarthLink	IBM
AT&T	Easyspace	IdeaOne Telecom
AWS	eHow	iMeet
Axamba	Endurance International	Insight Technologies
Banamex	Engine Yard	Intelicloud
Battery Ventures	eNom	intergenia
Bessemer Venture Partners	EQSN	Intermedia
Black Lotus	EvoSwitch	Intuit
Blacknight Solutions	Facebook	Involta
BlueHost	Fasthosts Internet	iomart Group
Box.com	FastServers	iWeb Technologies
BT	FiberRing	Jimdo
Buongiorno	Firstserv	KKR
Cbeyond	Funio	Latisys
CBS	Gandi.net	Layered Technologies
Choopa.com	GlobalGold Network	LeaseWeb
Cincinnati Bell	GMB Mezzanine Capital	Limelight Networks
Cisco Systems	GMO Internet	Liquid Web
Claranet	GoGrid	Livestrong.com
CloudFlare	goMobi	Lloyds TSB Development Capital
Codero	Google	Locaweb
Concentric Cloud Solutions	Group NBT	Lunarpages

COMPANIES INCLUDED IN THIS REPORT

M247	Pinterest	Time
Mamut	Pipex	Triangle Capital
MaximumASP	Rackspace	T-Systems
Media Temple	Red Bull	Tucows
MegaPath	Red Fox Hosting	Twitter
Megaupload	RedCoruna	UK2 Group
Melbourne IT	Register.com	Ultraspeed
Mesh Digital	Register.it	United Internet AG
Microsoft	Rise	Vanticore
midPhase Services	salesforce.com	Verio
Montagu Private Equity	Samsung	VeriSign
Moonfruit	Scopevision	viaVerio
Myspace	SendGrid	VISI
NaviSite	ServePath	Vistaprint
NBC Universal	Server.lu	Volkswagen
NeoSpire	ServerOrigin Communications	Voxel
NetBenefit	Serverstream	VPS.NET
Netfirms	SharePoint911	Walmart
Network Solutions	NTT	Web.com
NEW WORLD APPS	Silver Lake Partners	WebsPlanet
Newtek Business Services	SingleHop	Webzilla
Nokia Growth Partners	Siteocity	Weebly
NTT	Six Degrees Group	WestHost
Oakley Capital Private Equity	Slice Networks	Windstream Communications
The Ocom Group	SoftLayer Technologies	XBT Holding
OpenSRS	SolutionPro	XO Communications
OpenStack	Sony	Yahoo
Open-Xchange	Squarespace	Yahoo Small Business
Orange Business Services	Strato	Yammer
Outright Inc	Switch Media	Yellowpages.com
OVH	Technology Crossover Ventures	Yola
Parallels	Telefonica	Zoho
Pastebin	The Go Daddy Group	
PEER 1 Hosting	The Planet	

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ABOUT 451 RESEARCH

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