Don't Panic!

Successfully Outsource Your Enterprise Unified Messaging

Openmail®

Richi Jennings, Lead Technical Product Manager
Hewlett-Packard
Nine Mile Ride
Wokingham
Berkshire RG40 3LL
United Kingdom

☎ +44 (0)1344-365870
📠 +44 (0)1344-763429
✉ richi@hp.com

www.hp.com/go/openmail

Agenda

1. **Recent History**
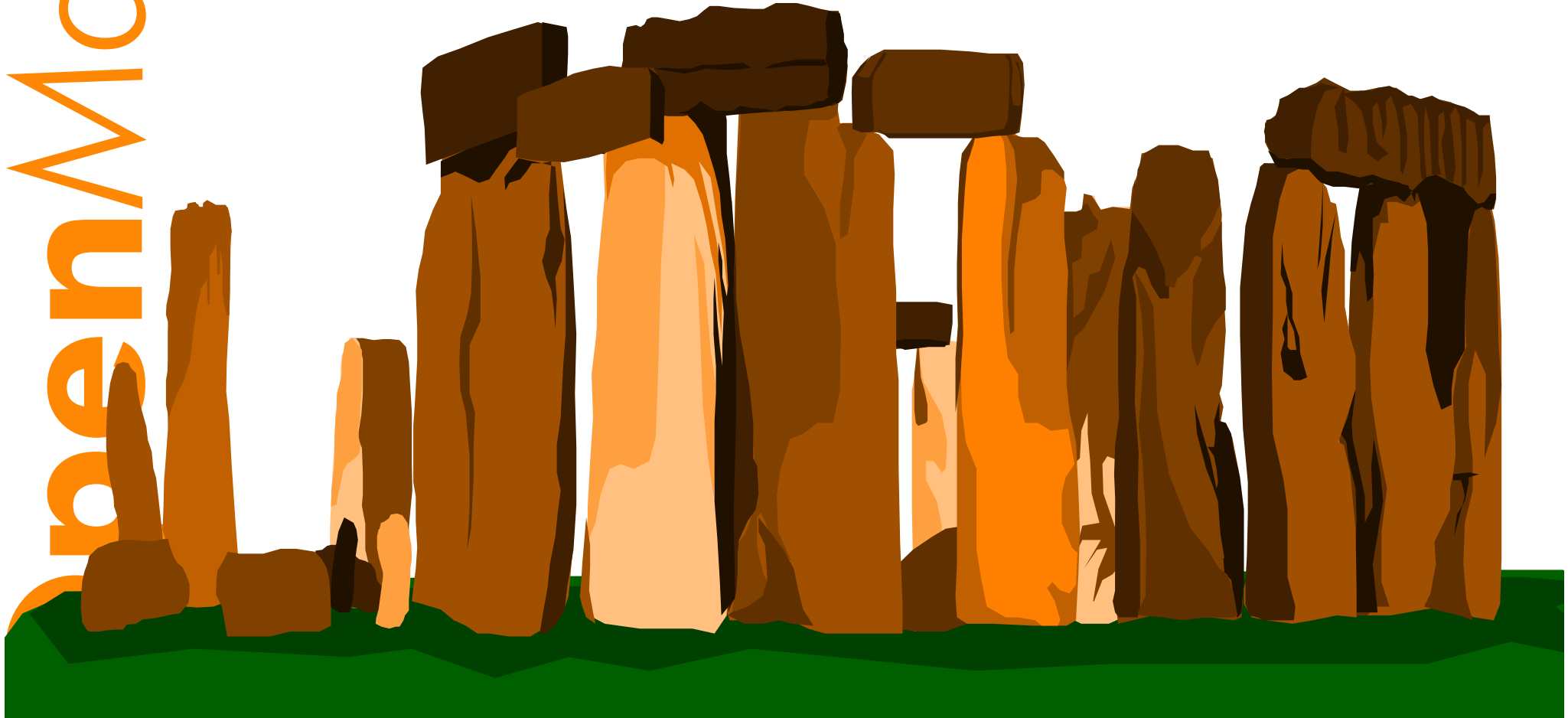
2. **Future and Vision**

3. **Turning Vision into Reality**

The Past

Market Size and Growth

- **The number of world-wide mailboxes is large (263M) and growing (>40% a year)**
- **The 1999 estimate is around 368M+**

90M public **173M private**

Source: International Data Corporation

Private e-mail Detail

173M Private Mailboxes

Mainframe/Mini

Shared File

All others

OpenMail 10M 10%

Internet Mail

MS Exchange 19.8M 25%

Software.com 12M, 31%
Netscape messaging
Server 6M, 15%
Sun internet Mail 5M, 13%
Berkley Sendmail (various
UNIX) 2M, 5%

Client/Server

Lotus Notes 28.5M 36%
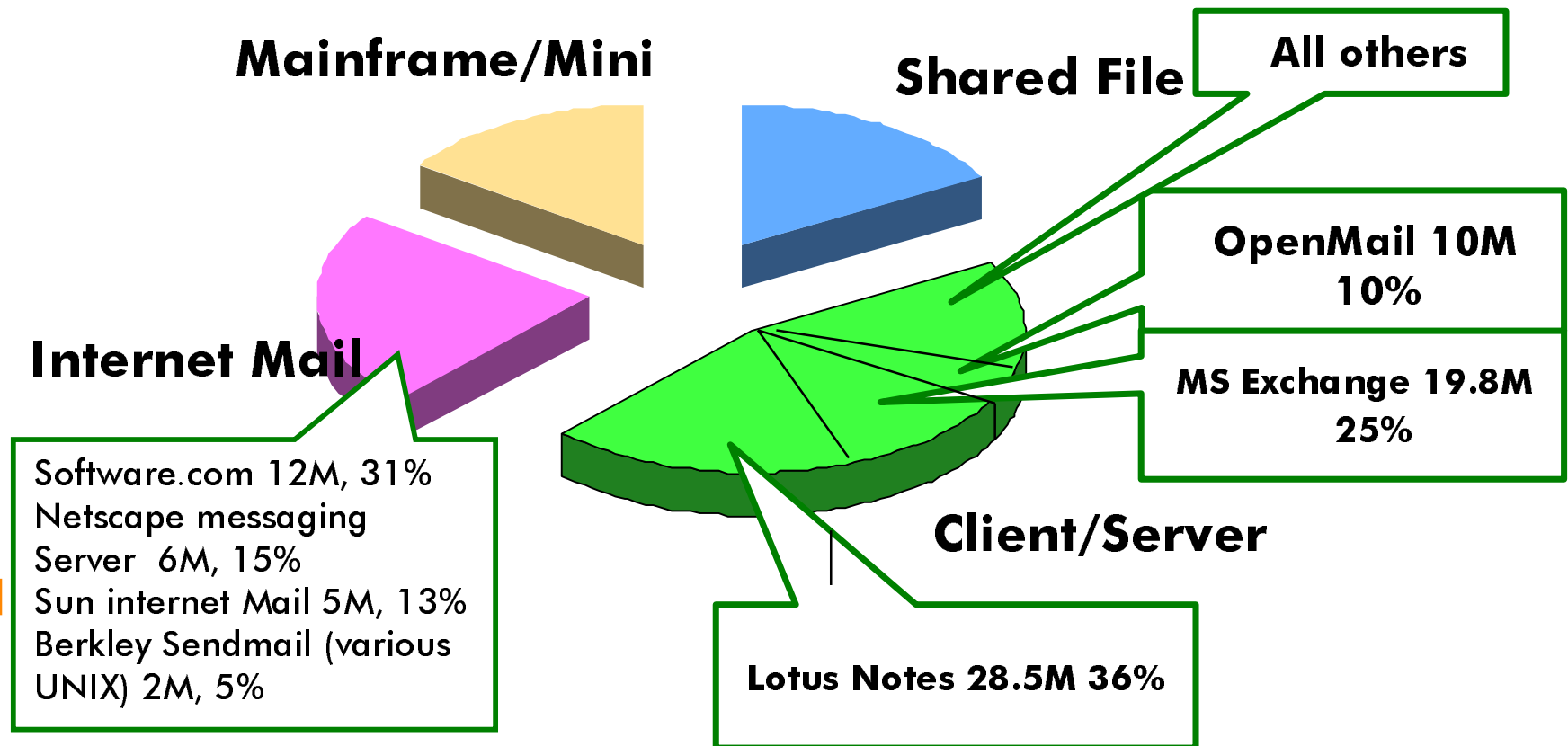
Source: International Data Corporation

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Public Mailbox Detail

90M Public Mailboxes

Freemail /Webmail 51%

- Hotmail 20M, 43%
- Yahoo Mail & Four11 Mail 10M, 22%
- Juno online 6M, 13%
- USA.Net 5M, 11%
- Netscape WebMail 1.6M, 3.5%

Service Subscription 4%

- AT&T Easylink 650K, 17%
- Fabrik 625K, 16%
- IBM Global Services 200K, 5%
- MCI Mail 150K, 4%

Online & Internet Service 45%

- AOL 14M, 34%
- Fujitsu Nifty-Serve 2.5M, 6.4%
- Deutche Telekom T-online 2.4M, 6%
- Compuserve 2M, 5%
- AT&T Worldnet 1.3M, 3.2%
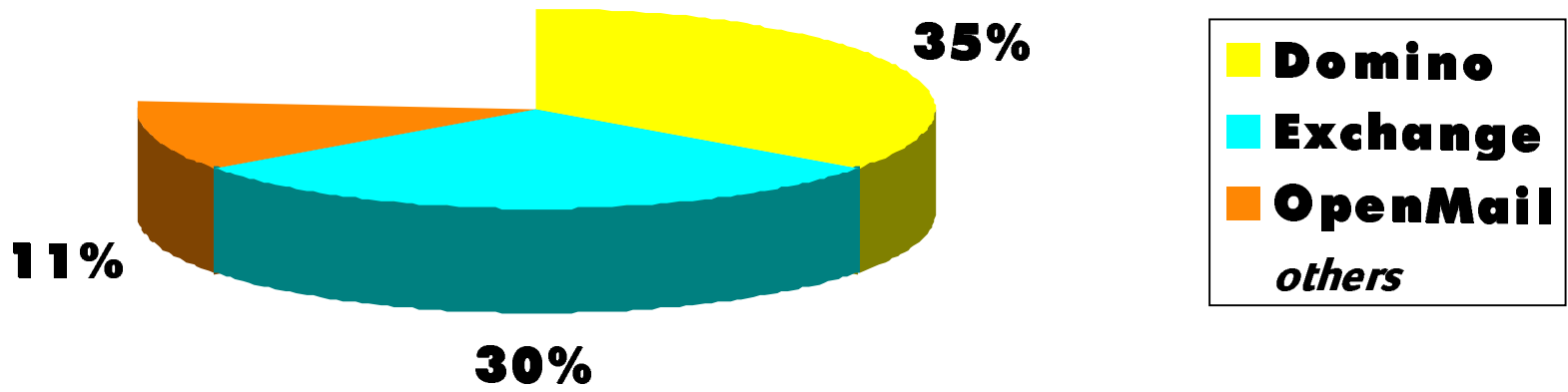- IBM Inet connect 1M, 2.5%
- GTE internet Services 914K, 2.3%

Source: International Data Corporation

OpenMail Market Share

35%

11%

30%

Domino
Exchange
OpenMail
others

Source: CNI Sept '99 survey of F1000

Use of Outsourcing Increasing
Changing the Nature of Organizations

"The Virtual Corporation"

Core Competencies
Interdependencies

Logistics

Marketing and Sales

Information Technology

Customer Service

Human Resources

Facilities Management
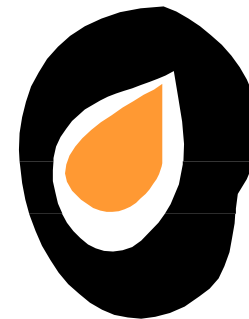
Finance and Accounting

Time

Self-sufficient
Organization
Vertically Integrated
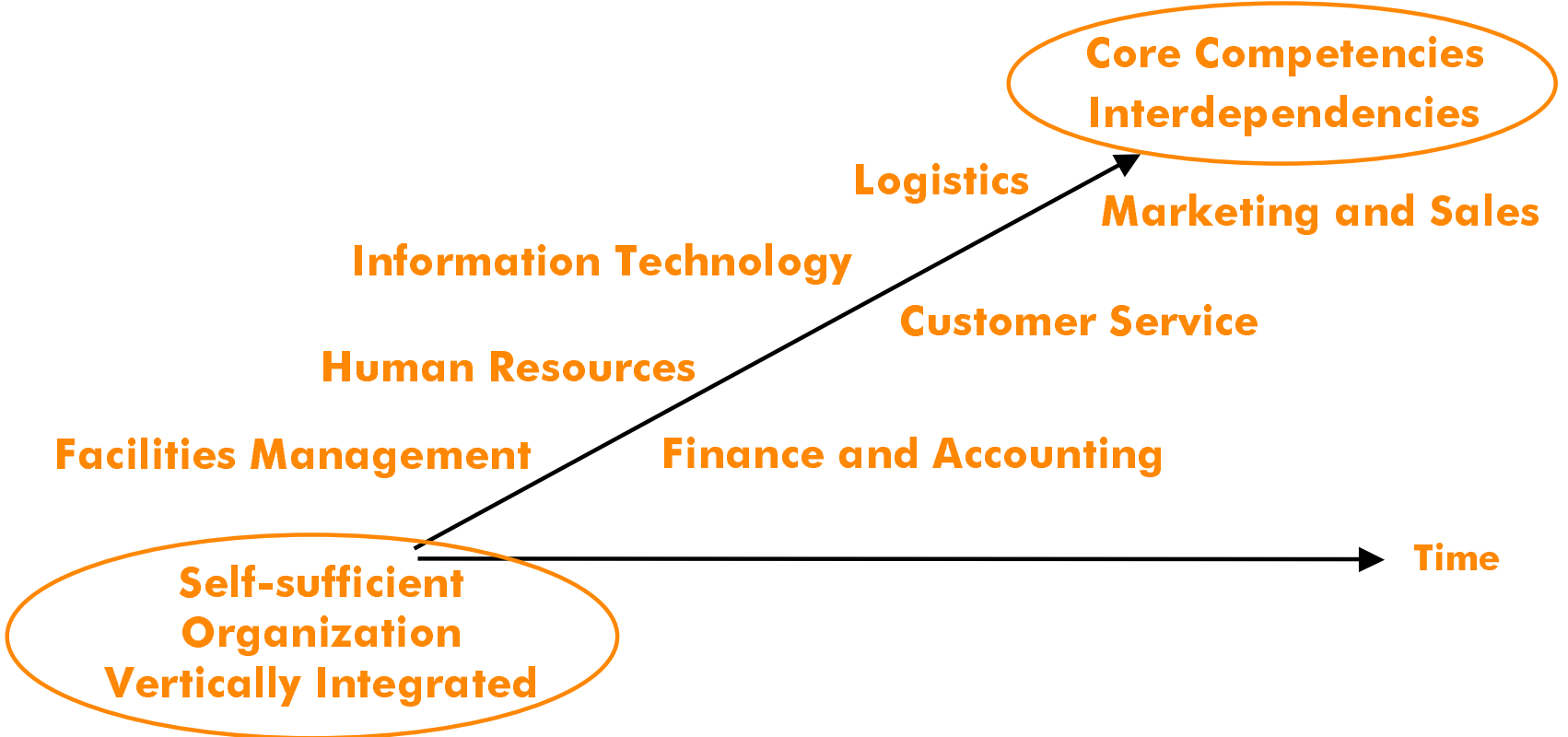
Beware...

- Opinions changing about the extent of outsourcing
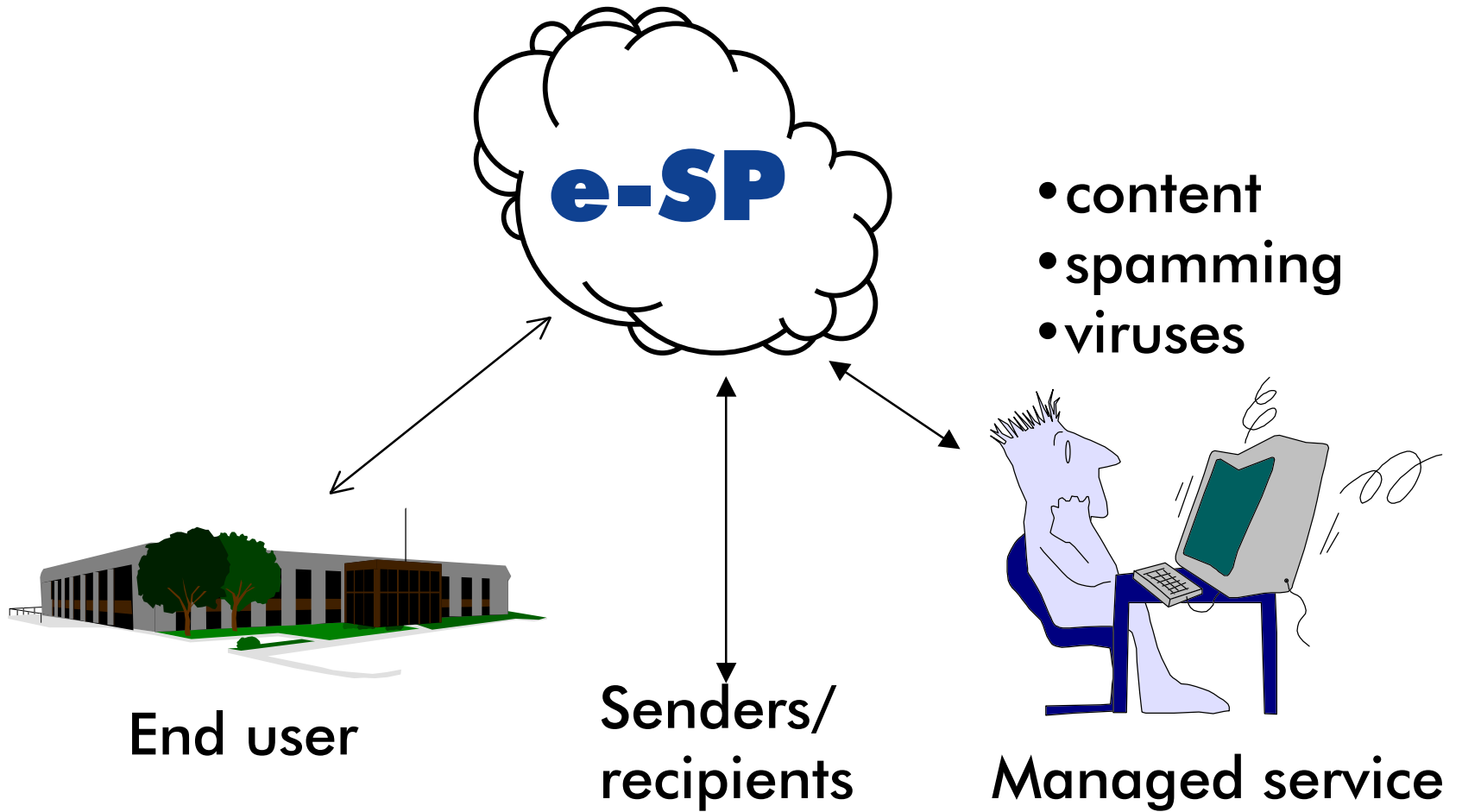- May not happen at all for many large companies
- There are alternatives...

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Managed Messaging

e-SP

- content
- spamming
- viruses

End user

Senders/
recipients

Managed service

Mobile Connectivity

- **Web mail now offered as standard by many ISPs**
  - Mostly consumer use, not secure
  - Professionals want secure web access
- **GSM and SMS well established**
  - Mobile workers want integration with cellular phone
  - SMS allows simple e-mail access
  - Bandwidth and coverage increasing
  - Demand for full web and e-mail access through phone
- **WAP (Wireless Application Protocol) coming along fast**
  - 'HTTP for mobile phones'
  - Endorsed by leading equipment providers

The Future...

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...Mobile E-Services

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Connectivity

- **In Finland more than 60% of users have cellphones**
- **In the UK the figure is over 50%**
- **All countries are catching up**
- **Finland is driving new mobile services very fast**
  - you can pay for services, such as car wash, by phone
  - future use will include links to home services and supply of electronic cash

Network Speed

- **E-commerce limited by current narrowband network speeds (9.6 or 14.4 Kbps)**

- **Wireless data doubling every year**

- **2nd generation technology improvements will increase speeds to >56Kbps**

- **3rd generation already planned - expect mobile data speeds >1Mbps**

- **Network speed then no longer a limiting factor - explosion in use**

- **E-services available 24 hours on demand**

Impact of Cell Phones

- **Nokia / Ericsson predict 1 billion cell phones by 2004**

- **10-15% will be smarter phones with Unified Messaging**
  - equals 100-150 million UM mailboxes in 2004
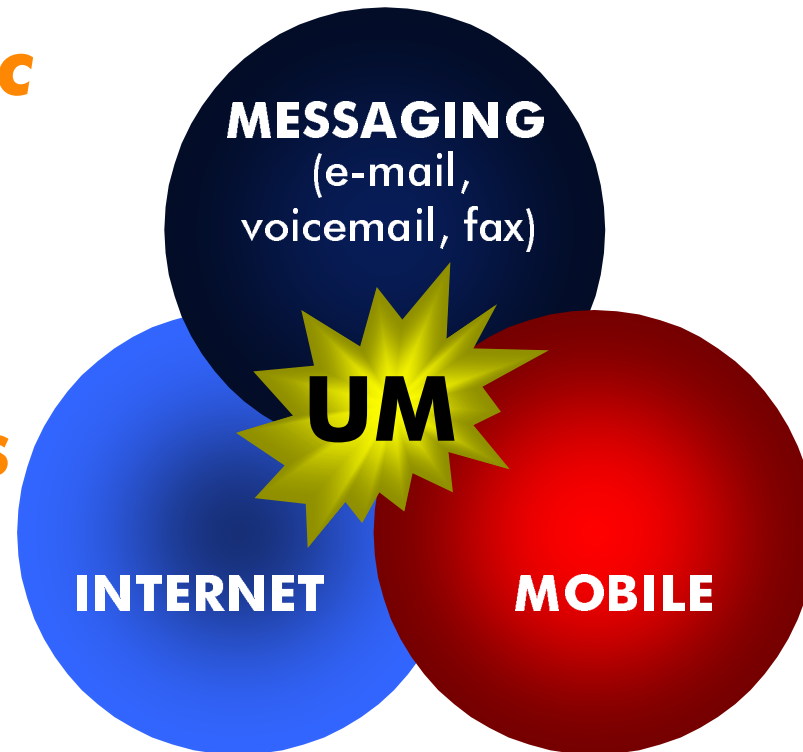
- **Ovum predicts 170 million UM mailboxes by 2006**

Unified Messaging

UM is a strategic convergence point of 3 high-growth communications markets

MESSAGING
(e-mail, voicemail, fax)

UM

INTERNET

MOBILE

Ovum 12/98:   "UM will replace the dialtone"

"UM will be the standard interface to the network"

"All messaging will become unified within 5 years"

Vision

- **Smart mobile phones combine voice and data**
- **Mobile access to internet and e-services through high bandwidth data network**
- **Permanent connection using data services**
- **Vast range of applications**
  - financial - on-line banking, share dealing
  - personal - links to home appliances
  - radio tuner - internet radio with global access
  - services - electronic cash, appliances

Personal and application messaging will be crucial in making this work!

![HP invent logo]

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Business Messaging for the next E. E-services.

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