CLOUD COMPUTING IN EDUCATION MARKET

By Service Model (SaaS, PaaS, IaaS), by Deployment Model (Private Cloud, Public Cloud, Hybrid Cloud, and Community Cloud), By User Type (K-12, Higher Education) - Worldwide Market Forecasts and Analysis (2014-2019)

MARKETSANDMARKETS

North - Dominion Plaza,
17304, Preston Road, Suite 800,
Dallas, TX 75252, U.S.

Tel. No.: 1-888-600-6441

Email: sales@marketsandmarkets.com
Website: www.marketsandmarkets.com

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1 INTRODUCTION

1.1 KEY TAKEAWAYS

- Increased cost flexibility and enhanced infrastructure scalability are expected to be the two major market drivers.
- The higher education user type market is expected to be the highest revenue generating component.
- Software-as-a-Service (SaaS) is expected to exhibit the maximum adoption rate among the various cloud service models.
- North America (NA) is expected to experience the highest growth rate in the adoption of cloud in the education sector.
- New business models for cloud with improved product offerings form a major opportunity for cloud providers and vendors.
- Gaining insights for key growth strategies for the companies in cloud computing in education market through the analysis of competitive landscape.
- Plan investment strategies from market growth forecasts.
- Impact analysis of market dynamics that describes the factors currently driving the growth in the market along with short-term, mid-term, and long-term impact.

1.2 REPORT DESCRIPTION

In the recent years, there has been a significant growth in the education sector. Educational institutions have become highly dependent on Information Technology (IT) to suite its business requirements. Procuring and maintaining an extensive range of hardware and software entail substantial and ongoing investments.

Technology in education has played a significant role in enabling students and educators to interact with one another through the upcoming education opportunities. Thus, educational institutions have been under constant pressure to offer reasonably priced services and tools.

The substantial production of inexpensive computers, Internet broadband connectivity, and loaded learning content have created a worldwide trend in which Information and Communication Technology (ICT) is being used to alter education. Cloud computing is beginning to play a key role in this revolution.

The constant development in technology in the education sector has helped educators to create a collaborative environment where applications, predominantly email and web conferencing, can be accessed from any location, using an array of devices.

Cloud computing in the educational environment will help both students and teachers as a lot of collaboration and exchange of information takes place in the academic world. The report outlines a broad structure and definite actions that can assist IT decision makers and government authorities recognize the needs of the education community, including students, teachers, and administrators. This report analyzes the growth rate and penetration of cloud computing in the education sector across all regions.

The global cloud computing market in education has been segmented on the basis of service models, deployment models, user types, and regions. Service models are sub-segmented into Software-as-a–Service (SaaS), Platform-as-a-Service (PaaS), and Infrastructure-as-a-Service (IaaS). Deployment models are sub-segmented into private cloud, public cloud, hybrid cloud, and community cloud. User types are sub-segmented into K-12 and higher education.

The global cloud computing market in education is segmented on the basis of regions such as North America (NA), Europe, Asia-Pacific (APAC), Middle East and Africa (APAC), and Latin America (LA). The global cloud computing market in education is provided for each region from 2014 to 2019. The report profiles leading companies such as Adobe Corporation, Cisco Systems, IBM Corporation, Oracle Corporation, Citrix Systems, NetApp, NEC Corporation, Salesforce.com, Huawei Technologies, and EMC Corporation.

1.3 MARKETS COVERED

This research report segments the cloud computing in education market as follows:

On the basis of service model:

- SaaS
- PaaS
- IaaS

On the basis of deployment model:

- Private cloud
- Public cloud
- Hybrid cloud
- Community cloud

On the basis of user type:

- K-12
- Higher education

On the basis of region:

- NA
- Europe
- APAC
- MEA
- LA

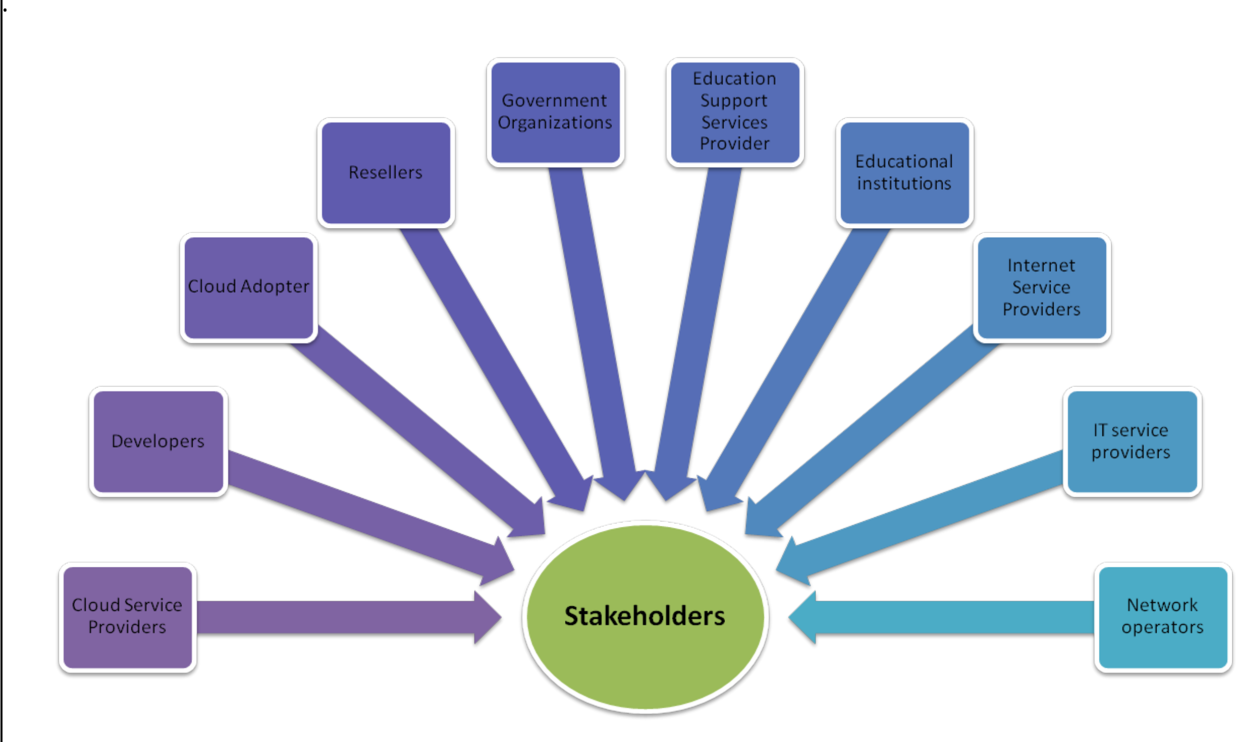
1.4 STAKEHOLDERS

- Cloud service providers
- Developers
- Cloud adopters
- Resellers
- Government organizations
- Education support service providers
- Educational institutions
- Internet service providers
- IT service providers
- Network operators

sales@marketsandmarekts.com
www.marketsandmarkets.com

FIGURE 1

CLOUD COMPUTING IN EDUCATION: STAKEHOLDERS



Source: MarketsandMarkets Analysis

The figure given above highlights the stakeholders involved in the cloud computing in education market.

1.5 RESEARCH METHODOLOGY

This research study is a result of thorough secondary and primary research, followed by various data triangulation methods and proprietary estimation models.

1.5.1 KEY DATA

- Analysis of the market structure by identification of various sub-segments in the market of cloud computing in education
- Identification of the major trends and factors driving and inhibiting the growth in the cloud computing in education market
- Forecast of the market size in the cloud computing in education market across the various sub-segments and regions
- Strategic analysis of each sub-market, with respect to individual growth trends and contributions to the overall cloud computing market in education
- Analysis of opportunities in the cloud computing market for education by identifying high-growth segments in this market
- Strategic profiling of key players in this market and comprehensive analysis of the products and core competencies in the market
- Tracking and analysis of competitive developments such as mergers and acquisitions, joint venture and collaborations, and the overall competitive ecosystem in the global cloud computing in education market

Key data from secondary sources:

- Market categorization by service models, deployment models, and user types across various regions
- Cloud computing in education market trends and revenues across different regions
- VC funding in the cloud computing in education market

Key data from primary sources:

- Validation of market segmentation
- Cloud computing in education market size shares of different regions
- Expected growth rate of cloud computing in education market, service models, deployment models, and user types across various regions
- Market share proportions of the various segments and sub-segments in the cloud computing in education market

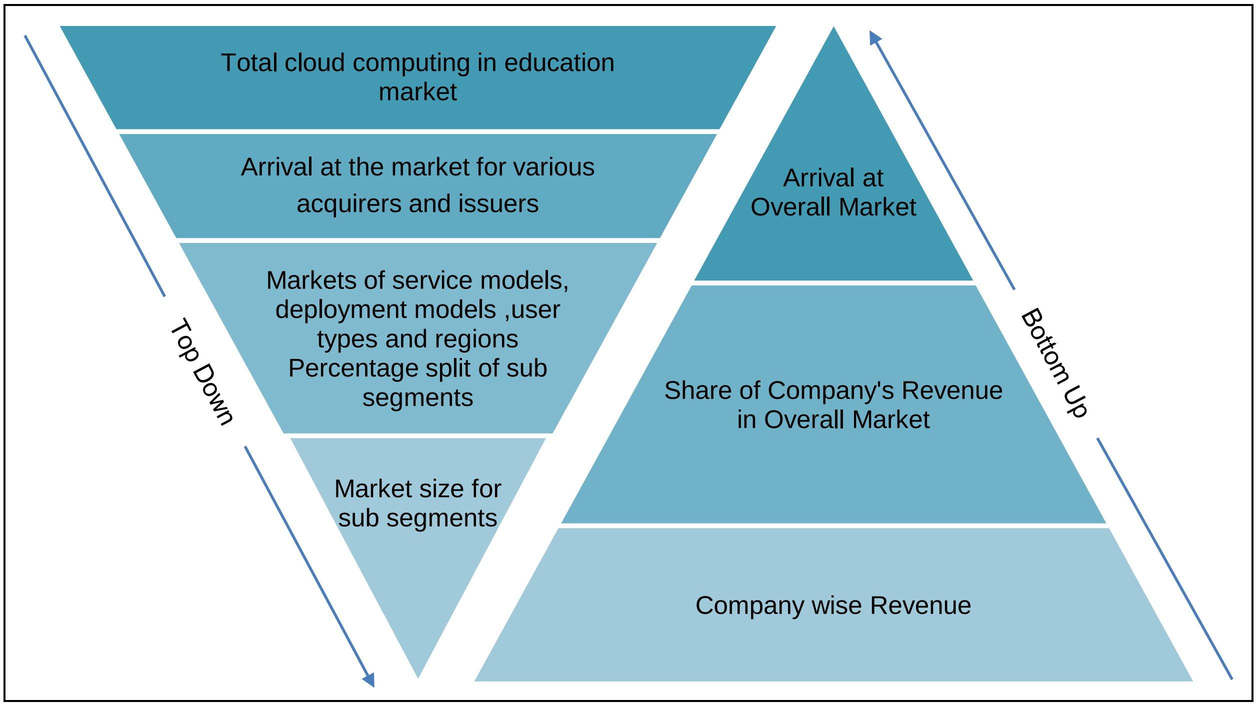
1.5.2 DATA TRIANGULATION & MARKET FORECASTING

A top-down and bottom-up data approach was followed. Data from interviews was further consolidated, checked for consistency and accuracy, and then collated into the MarketsandMarkets data model to arrive at the market numbers.

- **Bottom-Up:** Individual company revenues and insights from discussions were considered for sizing the market. This was further triangulated based on type of companies, their individual offerings, and revenue percentages specific to the cloud computing in education market.
- **Top-Down:** Upon estimation and validation of the main market size, further segmentation was done based on consolidated inputs from key players, with respect to regional adoption trends, pervasiveness across different verticals, and type of end-users and corresponding pricing models.

FIGURE 2

CLOUD COMPUTING IN EDUCATION: DATA TRIANGULATION, TOP-DOWN & BOTTOM-UP APPROACH



Source: MarketsandMarkets Analysis

The figure given above depicts the bottom-up and top-down approach. In top-down approach, overall cloud computing in education market has been segmented to get percentage split and it is further segmented to get the percentage split of niche sub-segments. Conversely, in bottom-up approach, company-wise revenue is used to get overall market share of the company's revenue and thus total revenue of the market arrives.

The figure given above depicts the data triangulation of the cloud computing in education market.

1.6 FORECAST ASSUMPTIONS

- The cloud computing in education market is segmented by service model, deployment model, user type, and region.
- All the market sizes have been calculated on the basis of adoption trends in service models and deployment models.
- The proportions for this segmentation are taken after extensive secondary research and then these proportions have been confirmed with the primaries.
- The business entities and people are assumed to adapt to the new trends that obviously add value to their portfolio and daily life.
- MarketsandMarkets assumes that the political condition across various regions remain stable. Despite internal wars and other disputes between countries, the globalization of business remains uninterrupted so as to encourage the usage of resources around the world.
- The qualitative analysis which is done from the market data is solely based on the understanding of the market and its trends by the team of expert involved in making this report.
- The overall market is underestimated as it does not include small vendors.
- The world economy is assumed to be stable, exhibiting a strong positive growth. This is also expected to pertain among the economies of countries.
- Some market sizes may not add up to total as it has been rounded up.

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TABLE 1

GLOBAL CLOUD COMPUTING IN EDUCATION, MARKET GROWTH, BY SERVICE MODEL, 2014-2019 Y-O-Y (%)

Service Model	2015	2016	2017	2018	2019
SaaS	XX	XX	XX	XX	XX
PaaS	XX	XX	XX	XX	XX
IaaS	XX	XX	XX	XX	XX

Source: MarketsandMarkets Analysis

TABLE 2

HYBRID CLOUD MARKET SIZE, BY USER TYPE, 2014-2019 ($MILLION)

User Type	2014	2015	2016	2017	2018	2019	CAGR (2014-2019)
K-12	XX	XX	XX	XX	XX	XX	XX
Higher Education	XX	XX	XX	XX	XX	XX	XX
Total	XX	XX	XX	XX	XX	XX	XX

Source: MarketsandMarkets Analysis

TABLE 3

COMMUNITY CLOUD MARKET GROWTH, BY REGION, 2014-2019 Y-O-Y (%)

Region	2015	2016	2017	2018	2019
NA	XX	XX	XX	XX	XX
Europe	XX	XX	XX	XX	XX
APAC	XX	XX	XX	XX	XX
MEA	XX	XX	XX	XX	XX
LA	XX	XX	XX	XX	XX

Source: MarketsandMarkets Analysis

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