

## Cloud Platform Services (IaaS/PaaS) in Japan: Key Research Findings 2018

### ◆ Research Outline

Yano Research Institute has conducted a study on the domestic cloud platform services (IaaS/PaaS) market with the following conditions:

1. Research period: From July 2017 to March 2018
2. Research objects: Domestic cloud platform service providers, domestic private-sector businesses, and etc.
3. Research methodologies: Face-to-face interviews by the expert researchers, survey via telephone/e-mail, and mailed questionnaire

#### What are Cloud Platform Services (IaaS/PaaS)?

Both IaaS (Infrastructure as a Service) and PaaS (Platform as a Service) in this research indicate public cloud platforms (cloud platforms provided by service providers) where virtualization, automation, and other technologies are provided to users via internet. The market size is calculated based on the sales of businesses. Note that SaaS (Software as a Service) is not included in this research.

\*Research Period of Questionnaire: July to August, 2017; Research Objects: 517 corporations including domestic private-sector businesses, public institutions, and organizations; Research Methodology: Mailed questionnaire.

### ◆ Key Findings

#### ■ Cloud Platform Services Market in 2017 Attained 240.0 Billion Yen, Remarkable Rise by 33.3% on Y-o-Y Basis, Expected to Take Great Strides to 650.0 Billion Yen by 2021

The cloud platform services market in 2017 based on the sales of the businesses has grown remarkably by 33.3% from the previous year to attain 240.0 billion yen. Announcement of introducing Amazon Web Services (AWS) by a large financial group has urged adoption of public cloud platforms at financial sector, the tendency of which has been spreading to other sectors as well. Because PaaS is led by AI and IoT, and because corporate clients to build the systems has been increasing, the demand of cloud platforms is likely to be larger in scale and longer in period of time to build. Due to such tendencies, the cloud platform service market is projected to maintain high growth for the time being, estimated to reach 652 billion yen by 2021.

#### ■ According to Questionnaire, About 35% of Corporations Consider Adoption of Microsoft Azure

In the questionnaire to the corporations as a part of this research, the most popular cloud platform service among 34 enterprises that responded being under consideration to introduce public cloud was “Microsoft Azure,” with 12 enterprises or 35.3% of the respondents considering adoption. This service is likely to acquire more user companies and increase the market share for the future, with the backdrop of high credibility in enterprise applications.

### ◆ Report Format

Published report: “Cloud Computing Market (IaaS/PaaS) 2018”

Issued on: March 8, 2018

Language: Japanese

Format: 187 pages in A4 format

Price: 180,000 yen (The consumption tax shall additionally be charged for the sales in Japan.)

**Contacts:** Public Relations

Yano Research Institute Ltd. (URL: <http://www.yanoresearch.com>)

Phone: +81-3-5371-6912

E-mail: [press@yano.co.jp](mailto:press@yano.co.jp)

■ **Table & Figure 1: Transition and Forecast of Cloud Platform Services (IaaS/PaaS) Market**

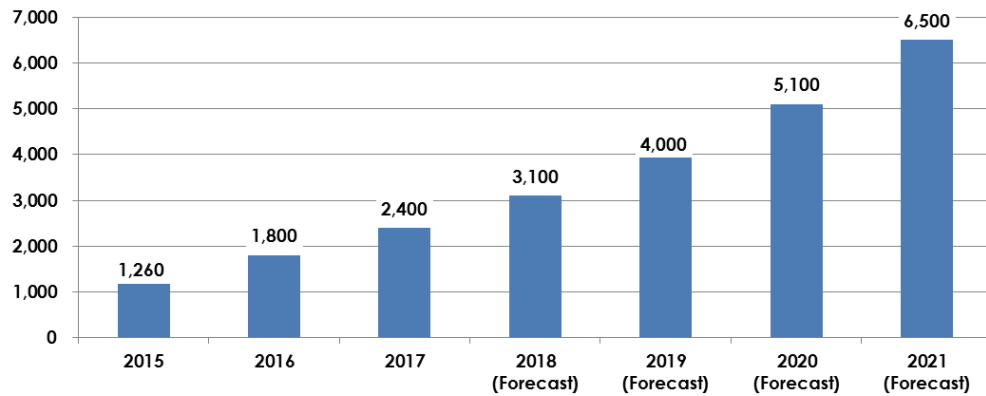
(Unit: Hundred Million Yen, %)

	2015	2016	2017	2018 (Forecast)	2019 (Forecast)	2020 (Forecast)	2021 (Forecast)
Cloud Platform Services (IaaS/PaaS) Market	1,260	1,800	2,400	3,100	4,000	5,100	6,500
Y-o-Y Comparison	-	142.9%	133.3%	129.2%	129.0%	127.5%	127.5%
CAGR	-	42.9%	38.0%	35.0%	33.5%	32.3%	31.4%

\*CAGR is compound annual growth rate from 2015

Estimated by Yano Research Institute

(Hundred Million Yen)

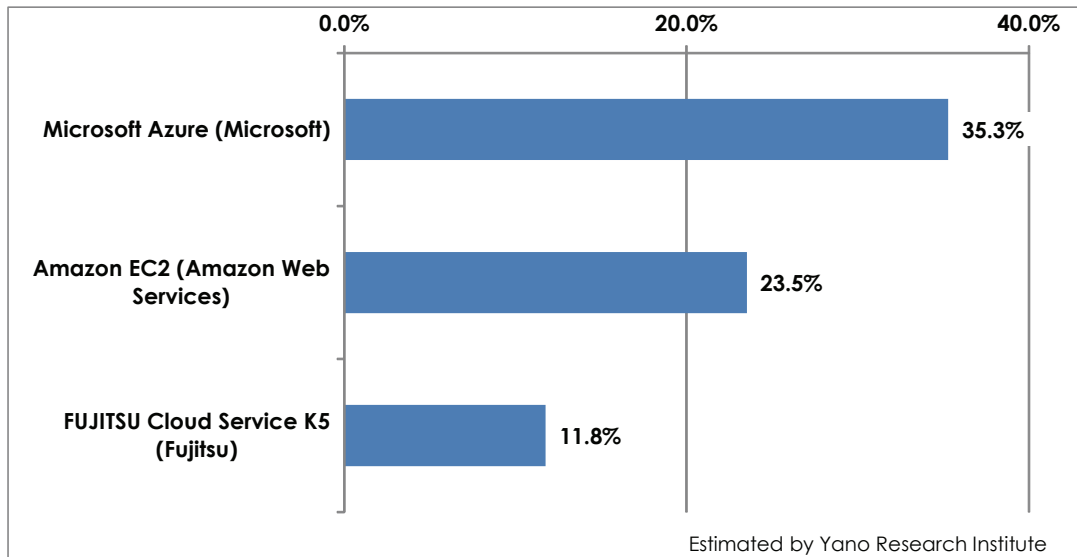


Estimated by Yano Research Institute

Notes:

1. The market size is based on the sales of the businesses.
2. The market size in this research does not include SaaS (Software as a Service).
3. CAGR in the above table shows the compound annual growth rate from 2015 to the year concerned.
4. The figures in 2018 and beyond are forecast values.

■ **Figure 2: The Top 3 Public Cloud Platform Services Being Considered to Introduce**



Estimated by Yano Research Institute

Notes:

5. Research Period: July to August, 2017; Research Objects: 34 enterprises that responded under consideration of introducing public cloud platform services among 517 corporations including domestic private-sector businesses, public institutions, and organizations; Research Methodology: Mailed questionnaire, multiple responses allowed.