Messaging Platforms Market, 2012-2016

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SCOPE

This study provides an analysis of the Messaging Platforms market in 2012, and its potential growth over the next four years. It provides market size, installed base and revenue market share by vendor, and forecasted market growth in terms of installed base and revenues, from 2012 to 2016. The study also provides an analysis of key vendors.

All market numbers, such as market size, forecasts, installed base, and any financial information presented in this study represent *worldwide* figures, unless otherwise indicated. All pricing numbers are expressed in $USD.

Throughout this report, the terms 'email' and 'messaging' are used interchangeably.

METHODOLOGY

The information and analysis in this report is based on primary research conducted by The Radicati Group, Inc in late 2012. It consists of information collected from vendors and users in global corporations via interviews and surveys.

Secondary research sources have also been used, where appropriate, to cross-check the information collected. These include company annual reports and market size information from various market segments of the computer industry.
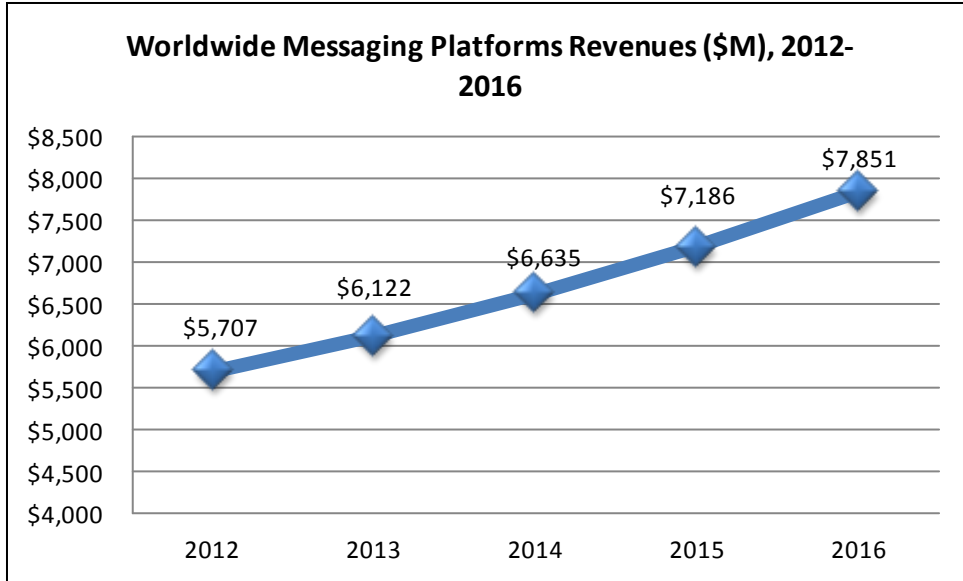
EXECUTIVE SUMMARY

Messaging platforms are email servers that provide email connectivity, as well as a growing range of additional functionality, such as: calendar scheduling, collaboration, security, real-time communication, mobility, as well as in some cases voice and video features.

The Messaging Platforms market is defined by two segments, as follows:

- **Enterprise Messaging Platforms** – These are email and collaboration platforms deployed on-premise by SMBs and enterprise customers of all sizes. Key products in this category include: *IBM Lotus Domino*, *Microsoft Exchange Server*, and many others.

- **Messaging Platforms for Service Providers** – These are highly scalable messaging platforms that are designed for demanding service provider environments, which can range from hundreds of thousands to millions of subscribers. Key products in this category include: *Oracle Communications Unified Communications Suite*, *Critical Path*, *Openwave Messaging Universal Messaging Suite*, *Microsoft Exchange Server*, and many others.

- Microsoft continues to dominate the on-premise Enterprise segment with a 57% market share at year end 2012. This dominance is the result of enterprise customers finding it easier to maintain an IT infrastructure built entirely on the Microsoft brand. Enterprise customers are expected to continue to migrate to Microsoft Exchange Server, causing an even greater gap between Microsoft and all other competitors in this space.

- While cloud deployments have undoubtedly penetrated the Enterprise space, the majority of mid to large enterprise customers are still uneasy about migrating to

the cloud. While these customers understand the many benefits of cloud deployments, they are wary about security and data privacy on cloud deployments.

- In the Messaging Platforms for Service Providers segment, there is a growing demand for richer, easy-to-use features from both consumer and business-oriented users. The prevalence of Facebook and YouTube is shaping the way users expect to communicate. Service providers must consistently keep up with these expectations by providing greater functionality.

- Messaging platform vendors must offer highly customizable packages for service providers that allow them to choose which features they want to deploy, ranging from mobile access, instant messaging, unified communications, and more. This customization is required to accommodate service providers of various sizes, different geographical locations, and different industry sectors.

- Microsoft's presence in the Messaging Platforms for Service Providers market with their Microsoft Exchange Server 2010 platform signals a threat to all other vendors in this space, even those focused entirely on selling to consumer-oriented service providers.

- Figure 1, shows the projected revenues of the Messaging Platforms market including both Enterprise and Service Providers segments over the next four years. The Messaging Platforms market's worldwide revenues are expected to grow from $5.7 billion in 2012 to over $7.8 billion by the end of 2016.

Worldwide Messaging Platforms Revenues ($M), 2012-2016

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