Messaging Platforms Market, 2014-2018

SCOPE

This study provides an analysis of the Messaging Platforms market in 2014, and its potential growth over the next four years. It provides market size, installed base and revenue market share by vendor, as well as forecasted market growth in terms of installed base and revenues, from 2014 to 2018. 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 are based on primary research conducted by The Radicati Group, Inc. Our proprietary methodology combines information derived from three principal sources:

a. Our Worldwide Database which tracks user population, seat count, enterprise adoption and IT use from 1993 onwards.

b. Surveys conducted on an on-going basis in all market areas which we cover.

c. Market share, revenue, sales and customer demand information derived from vendor briefings.

Forecasts are based on historical information as well as our in-depth knowledge of market conditions and how we believe markets will evolve over time.

Finally, secondary research sources have also been used, where appropriate, to cross-check all the information we collect. These include company annual reports and other financial disclosures, industry trade association material, published government statistics and other published sources.

Our research processes and methodologies are proprietary and confidential.

EXECUTIVE SUMMARY

- Messaging platforms, today, provide email functionality as well as a growing range of additional capabilities, which may include, but are not limited to: security, collaboration tools, instant messaging (IM), unified communications (UC), social media integration, conferencing, archiving and retention, and more.

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

  o **Enterprise Messaging Platforms** – are on-premises email and collaboration platforms that cater to the needs organizations of all sizes. Key players in this segment include: *Atmail*, *IBM*, *IceWarp*, *Ipswitch*, *Microsoft*, *Novell*, *Openwave Messaging, Oracle, Rockliffe*, *Zimbra*, and others.

  o **Messaging Platforms for Service Providers** – are highly scalable and reliable messaging platforms designed to meet the needs of demanding service provider environments, which can range from hundreds of thousands to millions of subscriber seats. Service providers deploying messaging platforms include: Internet Service Providers (ISPs), Telecommunication Providers (i.e. Telcos), Web Hosting Providers, Cloud Business Email Providers, and Application Service Providers (ASPs). Vendors in this segment include:

> *Atmail*, *IceWarp*, *Ipswitch*, *Microsoft*, *Openwave Messaging*, *Open-Xchange*, *Oracle*, *Rockliffe*, *Zimbra,* and others.

- Microsoft Exchange Server continues to be the leader in the Enterprise Messaging Platforms segment. Microsoft Exchange Server 2013, released in late 2012, includes a rich range of features, such as a mobile-optimized Outlook Web App (OWA) interface, native archiving, data loss prevention (DLP), and much more.

- Cloud-based email services are seeing strong adoption and are taking customers away from Enterprise Messaging Platforms. While cloud-based email services were initially appealing only to smaller organizations with limited budgets, now cloud email and collaboration services are seeing uptake with organizations of all sizes across all verticals. Though privacy remains a key concern among all enterprise organizations, the benefits of cloud adoption far outweigh the risks. As a result, growth in the Enterprise Messaging Platforms market has leveled off and will begin to trend down in the coming years.

- In the Messaging Platforms for Service Providers market, messaging platforms have evolved to become the hub for access to a broad range of communication channels that may include instant messaging (IM), various forms of chat, SMS, MMS, and activity streams for social networking. Most of these additional channels deliver real-time or near real-time communications which greatly enhances the overall experience for both consumer and business users. Ubiquitous access from all mobile devices has also become a must.

- Figure 1, shows the installed base distribution for the Enterprise Messaging Platforms segment by region, in 2014 and 2018. Over the next four years, the Enterprise Messaging Platforms market is expected to shrink in North America and Europe, primarily due to increased adoption of cloud-based email services.

Enterprise Messaging Platforms Installed Base by Region, 2014-2018
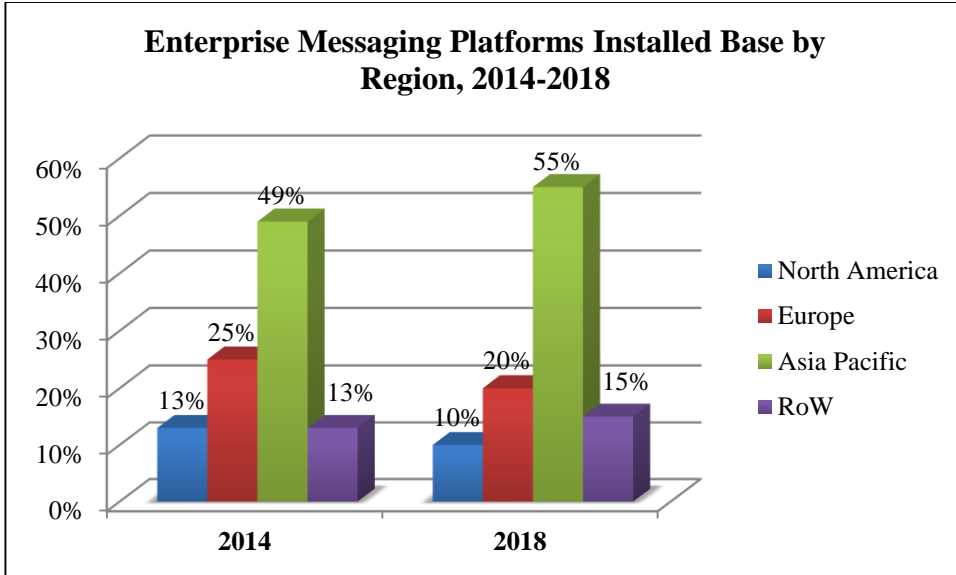
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