Microsoft SharePoint Market Analysis, 2014-2018

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SCOPE

This study examines the market for Microsoft SharePoint in both the On-Premises and Cloud-based Collaboration Markets. The study provides extensive 2014 data regarding installed base, broken out by business size, region, version, and other variables, along with four year forecasts. The report also examines the key features, direction and provides our analysis of SharePoint Foundation, SharePoint Server and SharePoint Online.

All of the numbers in this study represent *worldwide* figures, unless otherwise indicated. Any financial data is expressed in $USD.

Regional breakouts are provided for: North America, Europe, Asia Pacific, and Rest of World. This report does not contain country breakouts but these may obtained from The Radicati Group at an extra charge.

The revenue projections in the following sections do not include revenues from systems integration or professional services.

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

- Microsoft SharePoint's breadth of functionality makes it one of the most unique enterprise solutions available to businesses today. Microsoft SharePoint has no direct competitors, however, it competes against a variety of vendors and solutions in a number of different markets, as follows:

  o Enterprise Content Management (ECM)
  o Enterprise Social Networking
  o Web Content Management (WCM)
  o Business Intelligence (BI)
  o Enterprise Search

- Microsoft SharePoint Server was often criticized in the past as offering too broad a platform of features and functionality with no clear focus, which did not truly excel at any one particular business function. Over the past couple of years, however, Microsoft has invested heavily to address this criticism and today SharePoint 2013 provides a formidable enterprise collaboration platform which addresses many important business needs through a powerful, integrated solution. Some of the key areas where SharePoint Server 2013 has improved include: social collaboration, mobility and increasingly advanced eDiscovery features.

- Microsoft SharePoint continues to enjoy a strong developer ecosystem. While there is often some overlap between native SharePoint functionality and the third party solutions, a great deal of opportunity still exists for the ecosystem of SharePoint solutions to build on and enhance SharePoint's native functionality while adding support and deeper integration with non-Microsoft products and technologies. An interesting symbiotic relationship continues to exist between Microsoft and its partners.

- SharePoint Online is the cloud-based version of Microsoft SharePoint Server. It is available as part of Microsoft's cloud business productivity suite, Microsoft Office 365, which also includes: Office Professional Plus, Exchange Online, Lync Online, Office Online, Yammer, OneDrive for Business and much more. For customers not wanting to deploy the full Microsoft Office 365 functionality, SharePoint Online can also be deployed as a standalone online service.

- Microsoft has made it clear that it is investing heavily in its Office 365 cloud collaboration platform and that it will be rolling out all significant new features first into the cloud-based platform and only later, if at all, in the on-premises version of its products. SharePoint Online plays a pivotal role in the Office 365 suite of solutions as it integrates fully with Yammer for social networking, Exchange for messaging, OneDrive for Business for file and sync functionality, and much more, delivering an unprecedented integrated experience for users.

- Microsoft SharePoint continues to see strong market adoption across all verticals and geographies as it provides a feature rich enterprise collaboration platform that addresses content management, social networking, web content management,

business intelligence, search and eDiscovery.

- Figure 1, shows the worldwide breakout of on-premises SharePoint Server deployments and cloud-based SharePoint Server deployments in 2013.
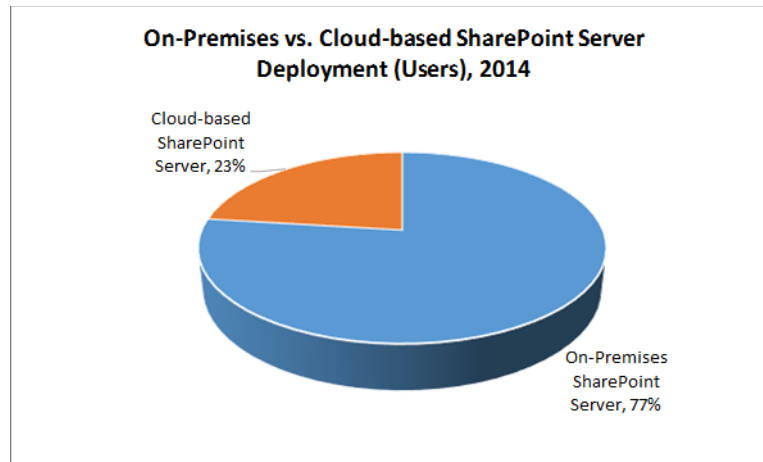

Figure 1: On-premises vs. Cloud-based SharePoint Server, 2014

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