Microsoft SharePoint Market Analysis, 2015-2019

SCOPE

This study examines the market for Microsoft SharePoint in the On-Premises and Cloud Collaboration Markets. The study provides extensive 2015 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 and direction of 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 is 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

- The term Microsoft SharePoint refers to a family of products and technologies which include:

  o *SharePoint Foundation* – refers to the on-premises SharePoint Foundation family, including: SharePoint Portal Server 2001, SharePoint Team Services, Windows SharePoint Services 2.0, Windows SharePoint Services 3.0, SharePoint Foundation 2010, and SharePoint Foundation 2013.

  o *SharePoint Server* – refers to the on-premises SharePoint Server family, including: SharePoint Portal Server 2001, SharePoint Portal Server 2003, Microsoft Office SharePoint Server (MOSS), SharePoint Server 2010, and SharePoint Server 2013.

- o *SharePoint Online* – refers to cloud SharePoint Server services offered by Microsoft Hosting Partners, or directly by Microsoft as part of its Office 365 suite of services.

- Microsoft is focusing new SharePoint functionality on addressing the following key areas:

  - o *Social Collaboration* – SharePoint Server's social capabilities are more in line with features made popular by consumer social media services, such Facebook and Twitter. SharePoint also integrates with Yammer, Microsoft's enterprise social networking solution, to provide a full enterprise social experience across people and content.

  - o *Mobility* – SharePoint provides enhanced mobile browsing capabilities through multiple mobile interfaces, allowing the user to choose the UI that is most effective for them. Enhanced push notifications and location-based features further round out SharePoint's mobile capabilities.

  - o *Web Content Management (WCM)* – SharePoint provides site content authors with control over the building of Internet, intranet, and extranet SharePoint sites. Improved capabilities include features such as: copying content from Word to SharePoint's Rich Text Editor, easier video content manipulation, improved image rendition support and more.

  - o *eDiscovery* – SharePoint includes a powerful eDiscovery solution out-of-the-box. It includes the ability to do in-place holds on content. An export tool allows results from eDiscovery search queries to be sent out for review. Microsoft has also included eDiscovery APIs that enable businesses to build customized solutions that leverage SharePoint's eDiscovery functionality.

- While at present there is still some resistance from customers to adopt cloud-based solutions, due to concerns over security, privacy and control, organizations are increasingly considering moving to cloud services, and over the next four years we expect to see a rapid change of attitudes and increased migration of all services to the cloud, including SharePoint.

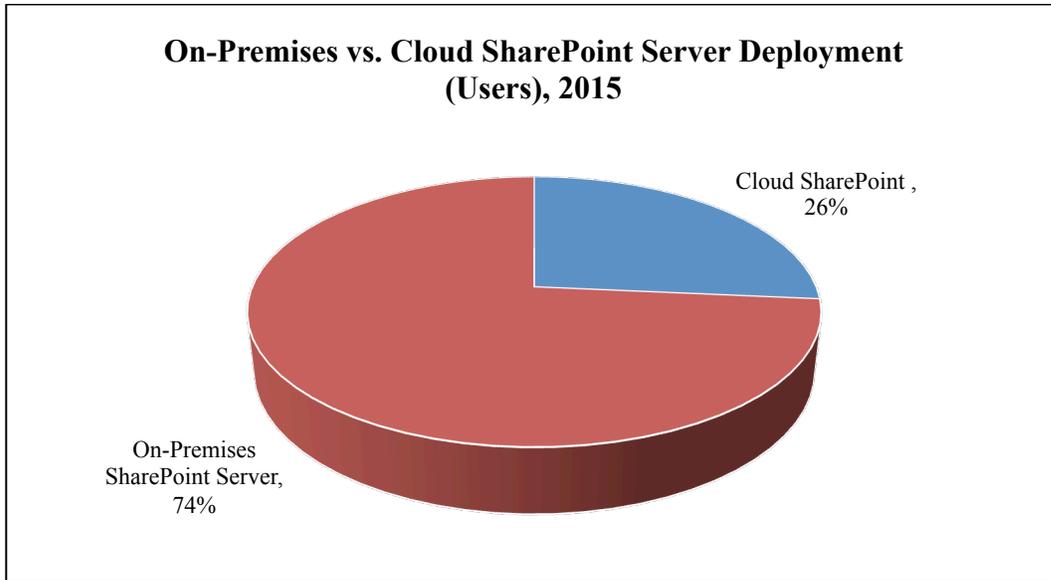- Figure 1, shows the worldwide breakout of On-Premises and Cloud SharePoint Server deployments in 2015.

On-Premises vs. Cloud SharePoint Server Deployment (Users), 2015

Figure 1: On-premises vs. Cloud SharePoint Server, 2015

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