



The Radicati Group, Inc.  
[www.radicati.com](http://www.radicati.com)

# Email Platforms for Service Providers

A Radicati Group Webconference

9:30 am, PT  
December 1, 2011

# Speakers & Agenda



The Radicati Group, Inc.  
[www.radicati.com](http://www.radicati.com)

## Speakers:

- ▶ Utpal Thakrar, *Principal Product Manager Messaging Applications, Openwave*
- ▶ Rafael Laguna, *CEO, Open-Xchange*
- ▶ Jing To, *Senior Product Marketing Manager, VMWare Zimbra*

## Agenda:

- ▶ *Presentations from Openwave, Open-Xchange and VMWare Zimbra*
- ▶ *Speaker Panel Discussion (all) - moderated by Sara Radicati*
- ▶ *Audience Q & A session*



# **Corporate Overview**

## **Openwave Systems Inc.**

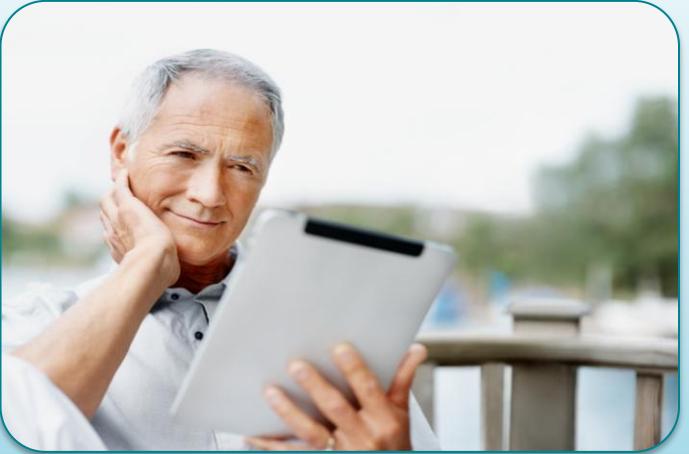
November 2011



## Openwave: Inventors of the Mobile Internet



- ▶ Headquarters: Silicon Valley
- ▶ Employees: 450+
- ▶ Status: Publicly traded on NASDAQ — OPWV
- ▶ Dev. Centers: APAC, Europe and Americas
- ▶ Standards-based: Openwave supports many standards organizations, including the Open Mobile Alliance (OMA), the World Wide Web Consortium (W3C), and the CDMA Developer Group
- ▶ Patents: 160 US and 50 global patents issued across product portfolio
- ▶ Product Focus: Congestion Control, Price Plan Innovation, and Converged Messaging



## Messaging

- IP-based mobile messaging and email
- Low-cost, “infinite” storage
- Geo-Redundancy / Disaster Recovery
- Personalized dashboard supports latest modes of communication
- Subscriber management

## Mediation

- Multimedia traffic optimization
- Network congestion control
- Tiered pricing innovation and data plan management
- User engagement and service discovery tools
- Open development for third-party distribution of browser-based apps.

# Worldwide Messaging Customers





## Market Drivers

### Storage Growth



- Distributed Architecture  
Active/Active Geographic  
Redundancy
- Full IPv6 Support
- Stateless and data  
compression deliver  
reduction in storage costs

### Over-the-Top Services



- Open Messaging Platform
- RM4 Facebook and  
Twitter Integration
- Access your messaging  
services regardless of  
device including mobile  
messages

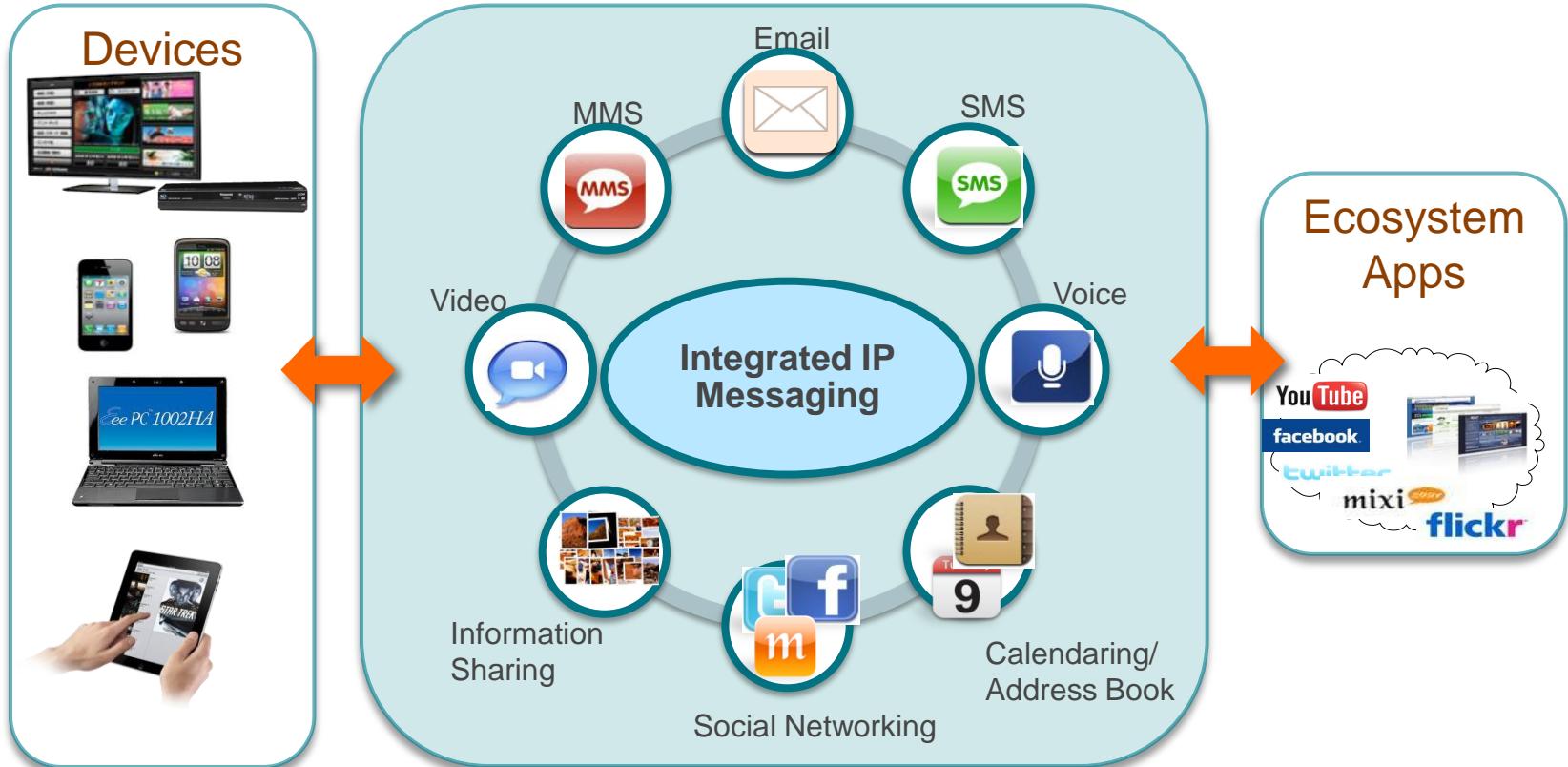
### Cloud Messaging



- Cloud-hosted service
- S3 Amazon Interface  
Cloud Capable
- Enable customers to  
create digital vault/  
personal locker service  
offers through content  
store integration



# Core Messaging Vision

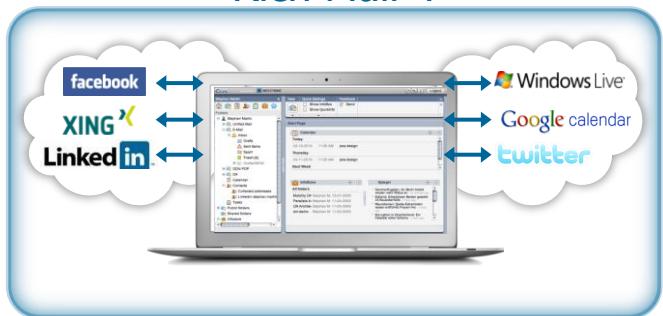


Anytime, anywhere, any-device access to messages and content

# Messaging Solution Overview



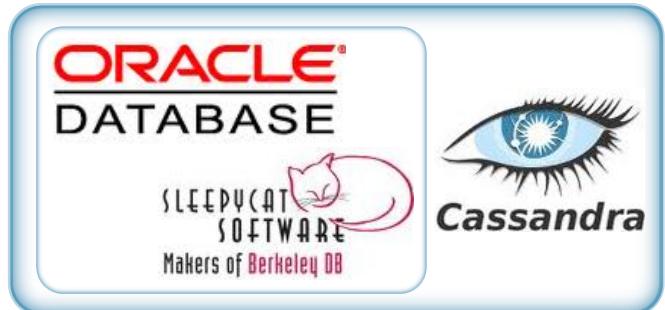
## Rich Mail 4



## CORE PARTNERSHIPS



## DATABASE



Amazon Compliant S3 API

## STORAGE





# Company Overview

Rafael Laguna, CEO

December 1, 2011



# From On-Premises to Infinite Cloud Computing



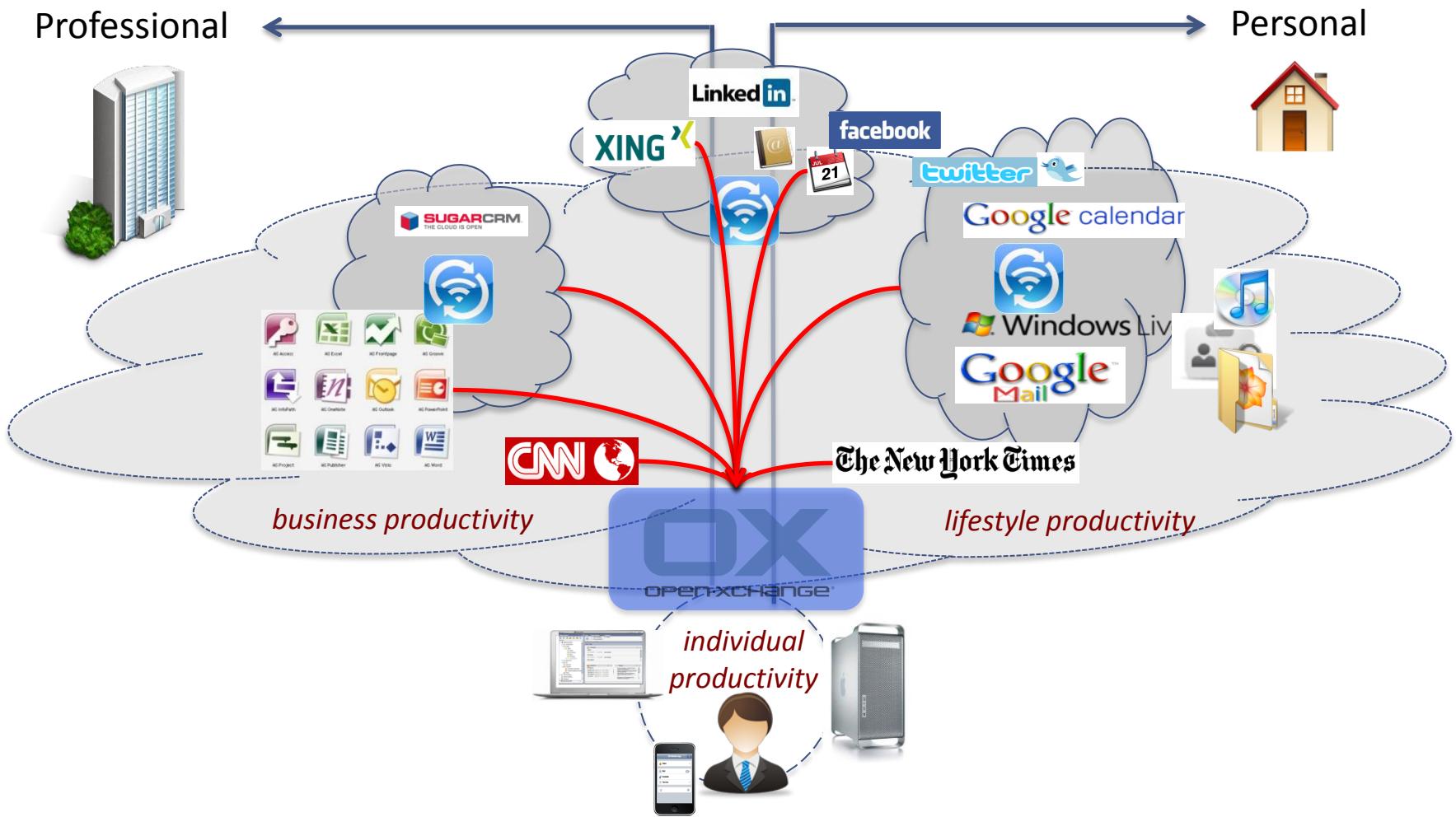
## Company

- » Headquarters: Germany
- » Founded: 1998
- » Offices: Nuremberg, Olpe, Tarrytown New York U.S.A.
- » Employees: 70+ (& growing)
- » Status: Privately held
- » Focus: Open source, cloud/ hybrid based messaging and collaboration software

## Product

- » Messaging and collaboration solutions for public/private SaaS deployments
- » Integrated for MSFT Outlook; Active Sync and Mac OS X. CalDev, CardDev, IMAP
- » Open source license leveraging 3rd party software like MySQL
- » Non-disruptive deployment, scale out; biggest single installation at 7M users
- » Browser-based user interface; built for the cloud: 'A True Child of the Web Age'
- » *Control your Data*

# Situation: Blurring of Professional & Personal



# Traction: Service Providers and Telecoms



- » Completely re-architected Open-Xchange for Cloud Application deployments with Service Providers 2006
- » Launch of **1&1 MailXchange** in February 2007
- » Large Service provider base with **1&1, Strato, Network Solutions, China Mobile\***
- » ISV partnerships with **Parallels** (#1 PaaS / Automation), **cPanel** (#2), **Openwave\*** (#1 Carrier Mail Platform Provider)
- » Total user base: 24m in 2010, hit **42M through 2011**
- » The **only professional software solution** for Partners to counter direct offerings from Microsoft, Google, Apple and Amazon (Office 365, Google Apps, iCloud)

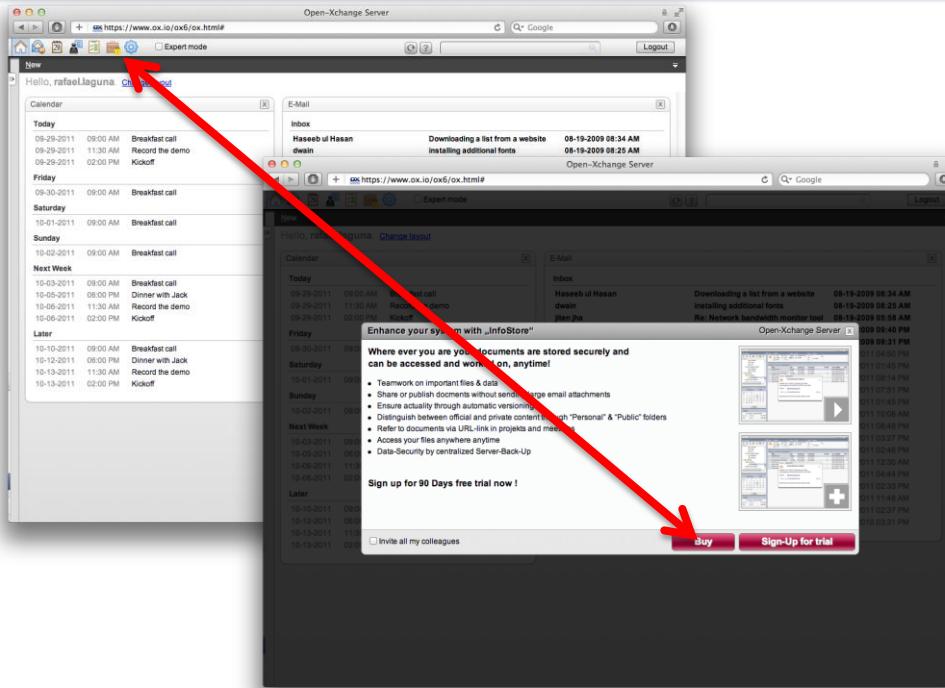
## Open-Xchange partners total addressable seats

Openwave	150 mn
1&1	70 mn
Parallels and cPanel	100 mn
China Mobile	750 mn
Pipeline	500 mn



\*Not announced yet

# Upsell Adjacent Services In-app: 1-click Stickiness



Capture interest in adjacent services right where natural curiosity and eyeballs are:

- Users check email over 8x day; 4x+ on Smartphone
- 3.4M emails sent per sec.
- 294B sent per day
- All social posts + web search per day = 1.2% of email volume
- ~1 hour per day maintaining inbox

## Upsell

- Storage for mail & files, “Data Hub”
- Mobile device apps, web UI, push

## Cross-Sell

- Mobile phone & data plan + sync.
- DSL/Cable access plan residential or business w/ consumer

## Affiliate Revenue

- Referral fees from e.g. LinkedIn, Google, Yahoo, MSFT Web protals

# Social OX: Connecting it All Together



**XING**

Start    Suche    Nachrichten

Ihre Verbindung zu Rafael Laguna

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**Lerner, Dirk**

Ortszeit: 09:24

Created on 03-11-2010 09:21 AM by Stephan Martin



# The Answer: Open-Xchange



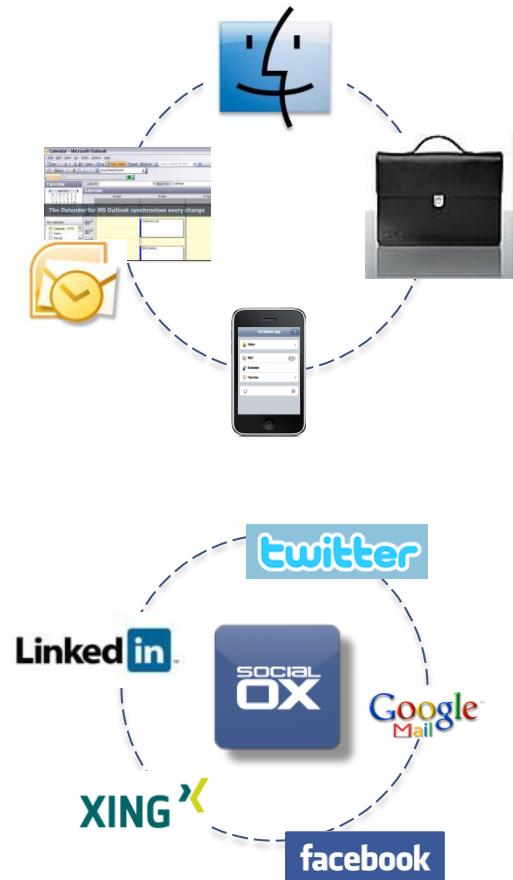
Replaces existing webmail solutions with easy-to-use user interface

- » No email server or edge services migration
- » Open-Xchange integration with existing email servers
- » Fully integrated into POA and Plesk and cPanel

## In-App Upsell Options

- » Integration with Microsoft Outlook
- » Integration with Mac OS X
- » Integrated document management (InfoStore, “online disk” – Upsell Option)
- » Active Sync Server for Push Mail, Calendar, Contacts for iPhone, WinMob, Nokia, Android and BlackBerry/BIS devices

## Integration of Social Network data via Social OX



# End User: What is driving the Post PC Era?

## Consumerization



## Anywhere, Anytime Access

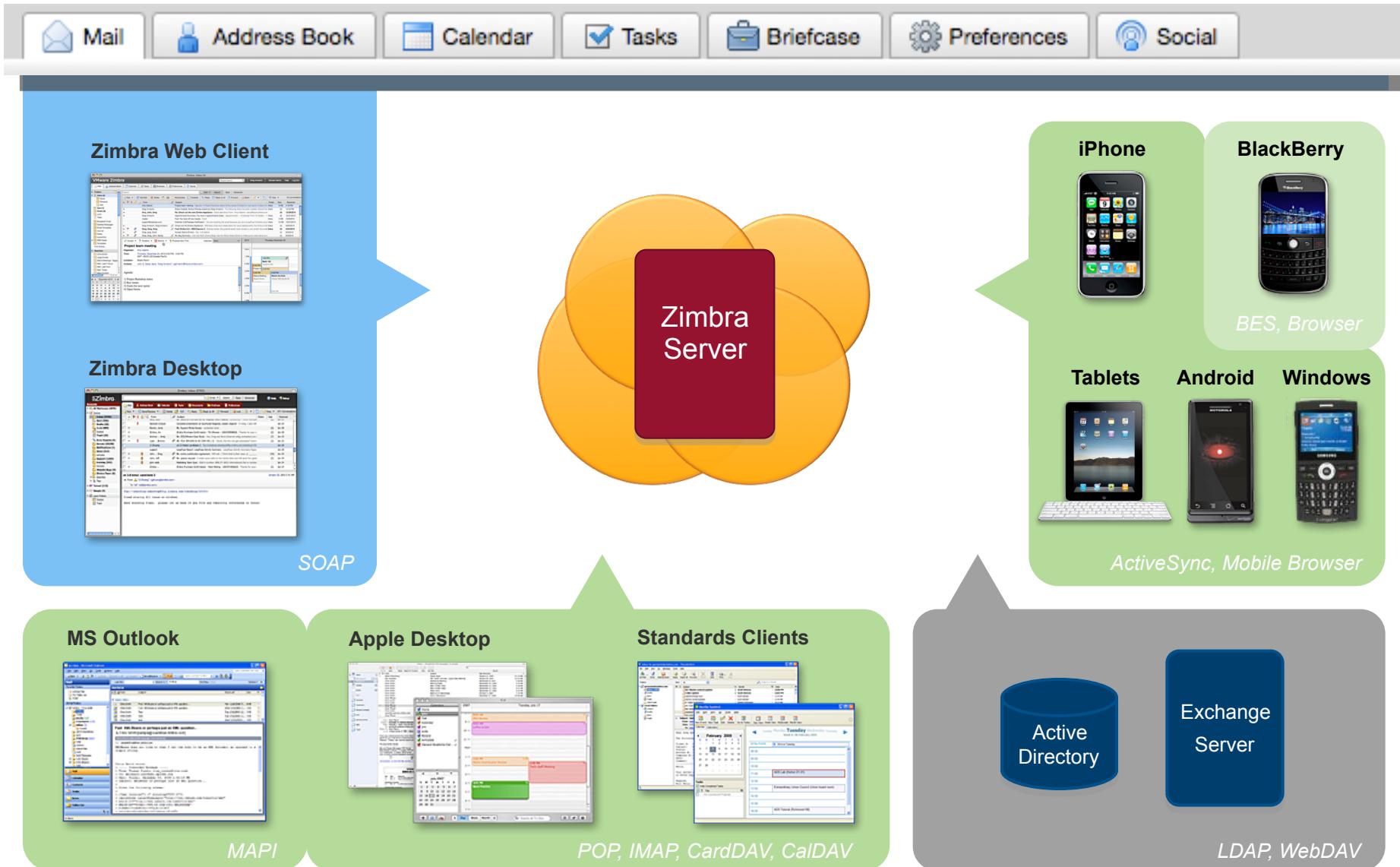


## New Open Apps

The image shows a Salesforce dashboard on the left, featuring a quota summary, a list of recent deals, and a tasks section. On the right, there is a cluster of social media and utility app icons, including Facebook, Twitter, LinkedIn, Digg, YouTube, and others, symbolizing the integration of business processes with consumer-grade applications.



# VMware Zimbra 7 Product Overview



# Simple and Scalable Software



## Easier Operations

- Web-based administration
- Remote device wipe
- End-user self-service

## Consistent and Reliable Service

- Integrated High Availability (HA) and Disaster Recovery
- Full support for VMware HA, Application Monitoring heartbeat and VMware SRM
- Protects all mail servers (MBS, MTA, LDAP, Proxy)

## Flexible Policy and Storage Controls

- Hierarchical storage management and archiving
- Fine grain user provisioning and policy management

# Extensible Framework and Workflows

- Zimlets enable 3rd party web services and new applications to be integrated directly in Zimbra
- Develop your own or use existing Zimlet from the open source community <http://gallery.zimbra.com>

**salesforce.com**  
Success. Not Software.

**dmdm**

**twitter**

**Google translate**

**skype**

**facebook**

**webex**

**BROADSOFT**  
Innovation calling.

**flickr**

**digium**  
The Asterisk Company

**SUNGARD**®

**ProcessMaker®**  
Workflow Simplified

Accounts

- Zimbra
  - @Zimbra (mentions)
  - direct messages
  - sent messages
- gregarms
  - @gregarms (mention)
  - direct messages
  - sent messages

Twitter Searches

- zimbra
- herod
- mashable
- #ITs4U

Digg

- Popular in 24 hours
- Technology
- Science

What are you doing?

update to:  Zimbra  gregarms  facebook

Just about ready to try Zimbra Desktop 2.0.1. Exciting! <http://bit.ly/g25RbO>

Shorten URL  Auto Shorten URL [undo](#)

Cancel Update Characters Left 62

62

Facebook 50+ via facebook share like comment

TC **TechCrunch:** Are you guilty of this as well? about 2 hours ago

Open external link

Why We Panic When Internet Services Fail Twitter is down. Skype is down. Tumblr is down. Facebook is down. Twitter is down again. You can base an entire tech reporting career around writing these types of posts. Because if you're like me and millions of other users right now, you can't access your Skype account because of a network connecti

mentions 50+ via Echofon

**mcconnell150:** Listening to @diradio while building a @Zimbra VM #GoodTimes about 8 hours ago

**vmwddave:** My @Zimbra migration got delayed and am hoping it gets rescheduled soon as Outlook crashes again.... Dec 21 at 13:3:32

via Twitter for Android

**TonyThijs:** RT @Zimbra RT @ianhomer

twitter: gregarms 50+ via twitterfeed

**uncrate:** Machete <http://un.cr/2SF> about 4 hours ago

via twitterfeed dm retweet

**uncrate:** Christian Bjørn Stackable Cookware <http://un.cr/2SE> about 4 hours ago

via twitterfeed dm retweet

**nprnews:** Coming Up: President O News Conference <http://n.pr/fZKW> about 4 hours ago

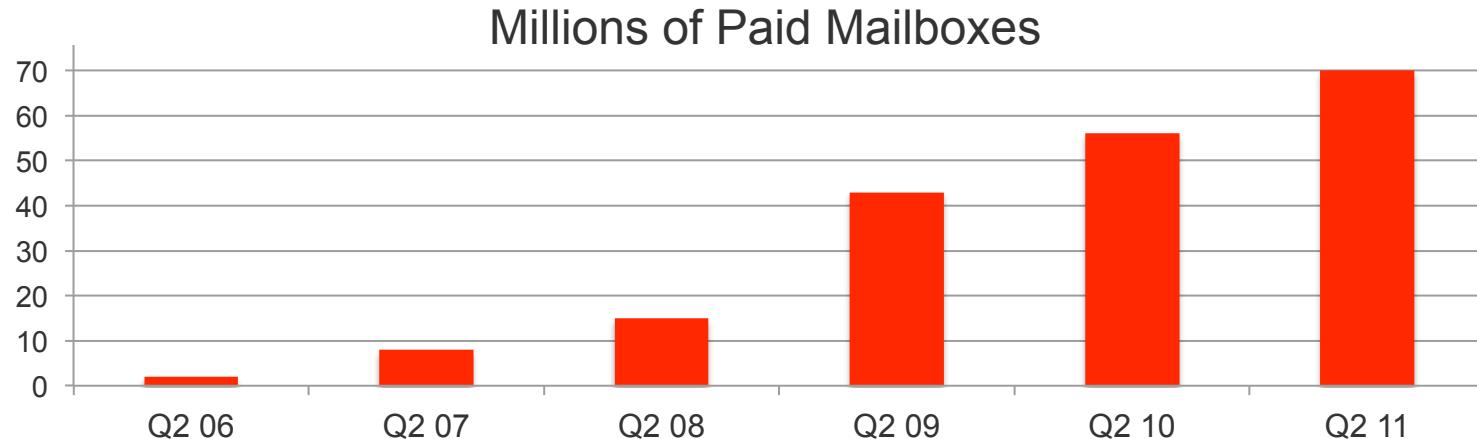
# VMware Zimbra Continues to Build Momentum

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**70 million** paid mailboxes

**250,000 +** organizations using Zimbra as SaaS

More than **45,000 registered community members**



# Major Service Providers

EMEA

## HSPs



Asia Pacific



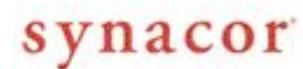
Americas



INOVA



## ISPs





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# Your Speaker Panel

- ▶ **Sara Radicati**  
President & CEO, The Radicati Group
- ▶ **Utpal Thakrar**  
*Pr. Product Mgr Messaging Applications, Openwave*
- ▶ **Rafael Laguna**  
*CEO, Open-Xchange*
- ▶ **Jing To**  
*Senior Product Marketing Manager, VMWare Zimbra*



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# Thank You!

## New Reports published by The Radicati Group:

- ▶ Email Platforms Market, 2011–2015
- ▶ eDiscovery Market, 2011–2015
- ▶ Hosted Business Email – Market Quadrant, 2011
- ▶ Survey: Security, Archiving and Compliance, 2011–2012
- ▶ Unified Communications Market, 2011–2012
- ▶ Survey: Instant Messaging. Social Networking, Unified Communications, 2011–2012
- ▶ Survey: Corporate Email, 2011–2012
- ▶ Mobile Email Market, 2011–2012
- ▶ Hosted Email Market, 2011–2015

You can view all our published and upcoming reports at [www.radicati.com](http://www.radicati.com)