



The Radicati Group, Inc.
www.radicati.com

Email Platforms for Service Providers

A Radicati Group Webconference

9:30 am, PT
December 1, 2011

Speakers & Agenda



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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



Messaging: The Challenge & Opportunity



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



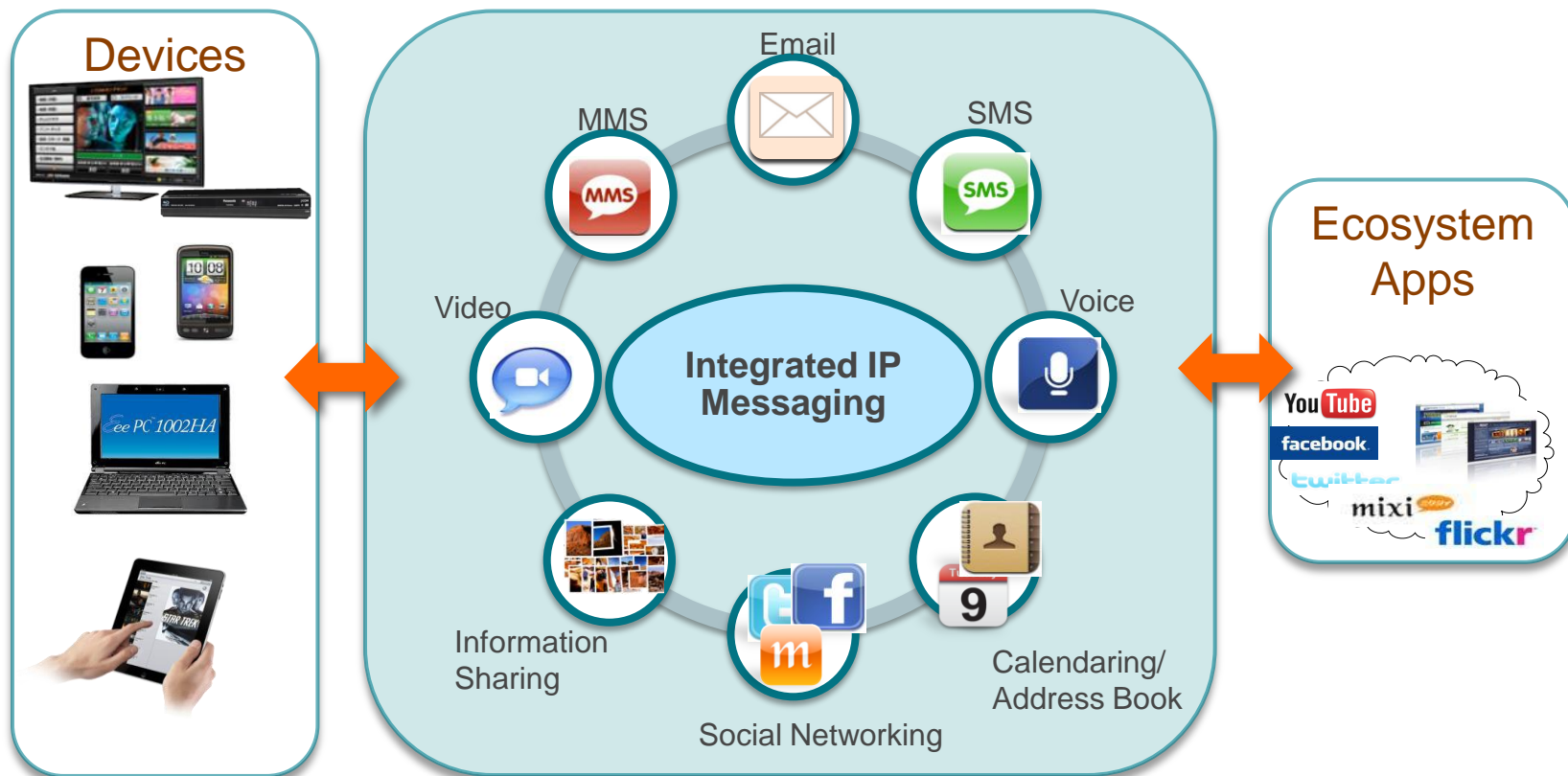
- Open Messaging Platform
- RM4 Facebook and
Twitter Integration
- Access your messaging
services regardless of
device including mobile
messages

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

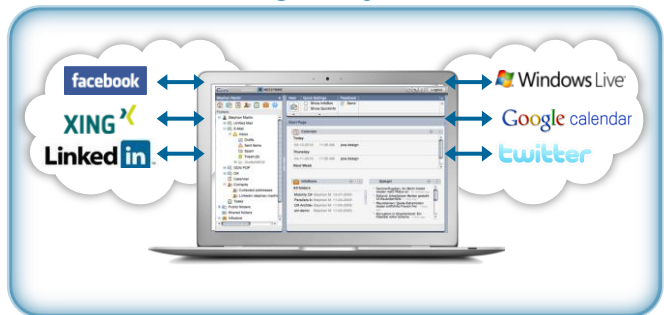


Anytime, anywhere, any-device access to messages and content

Messaging Solution Overview

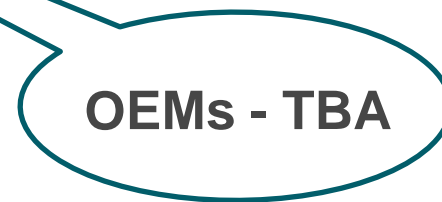
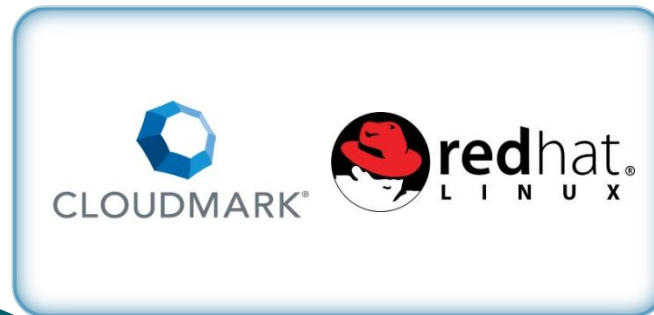


Rich Mail 4

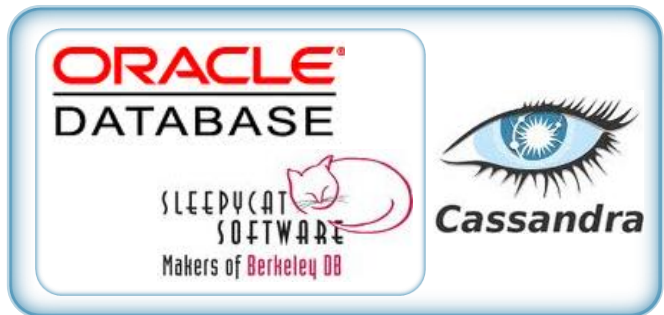


OX
open.xchange

**CORE
PARTNERSHIPS**



DATABASE



STORAGE





Company Overview

Rafael Laguna, CEO

December 1, 2011



From On-Premises to Infinite Cloud Computing



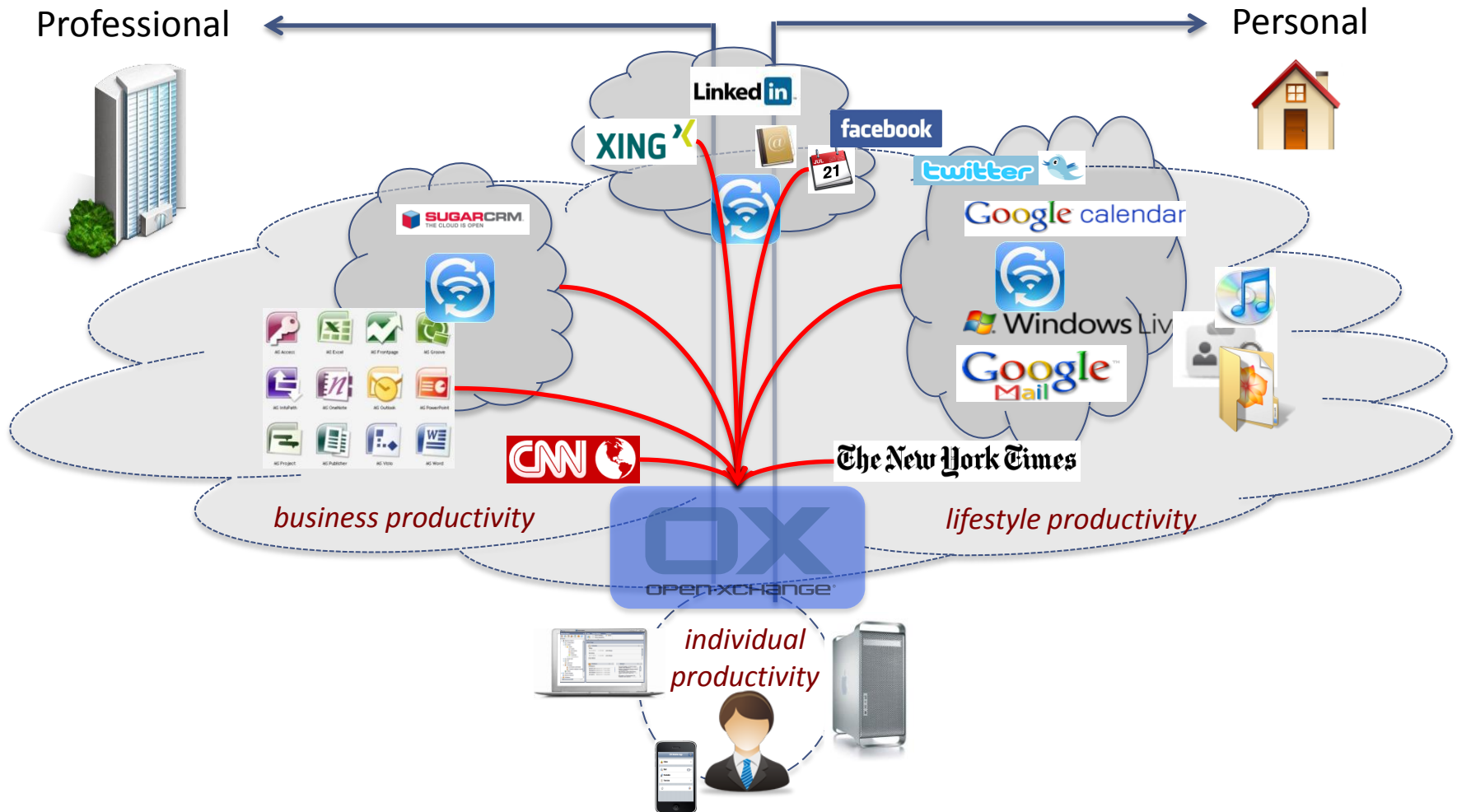
Company

- » 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 you 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)

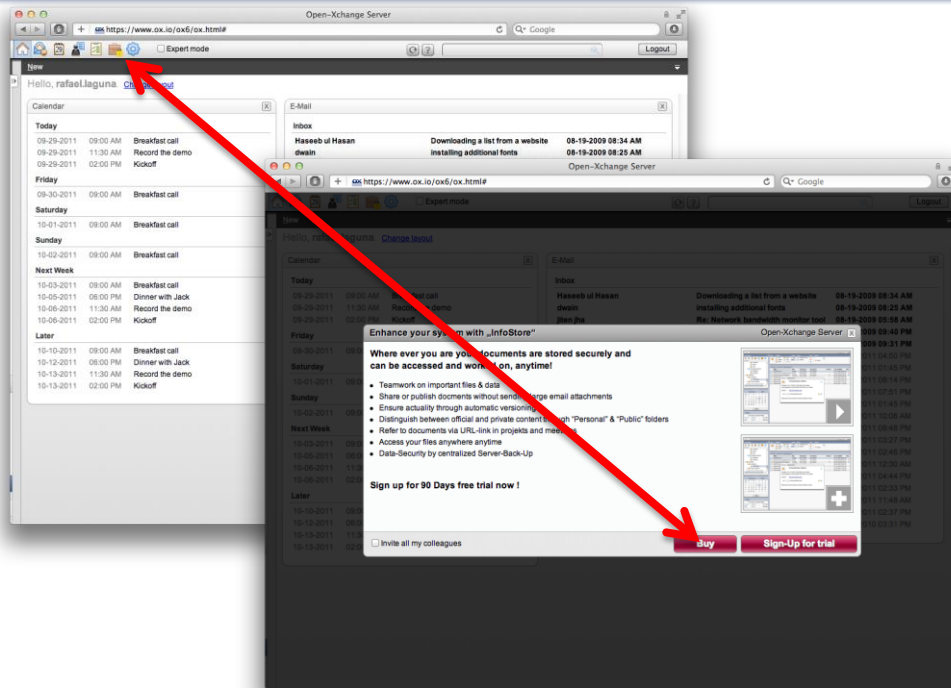
Open-Xchange partners total addressable seats

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 portals

Social OX: Connecting it All Together



XING

Start Suche Nachrichten

Ihre Verbindung zu Rafael Laguna

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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

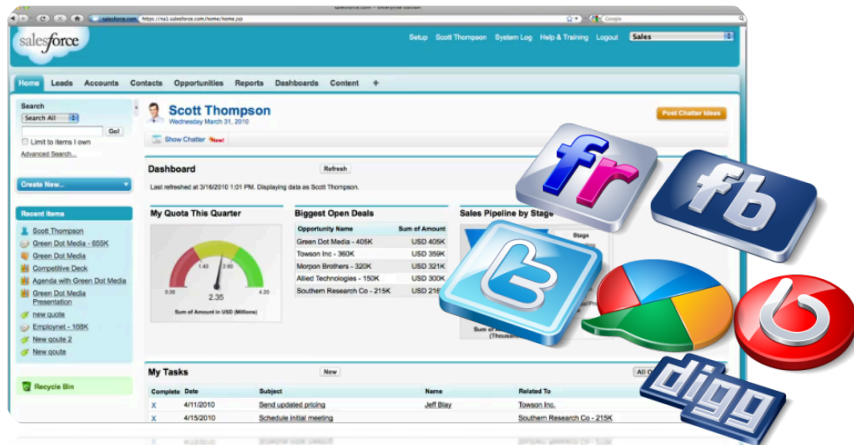


End User: What is driving the Post PC Era?

Consumerization



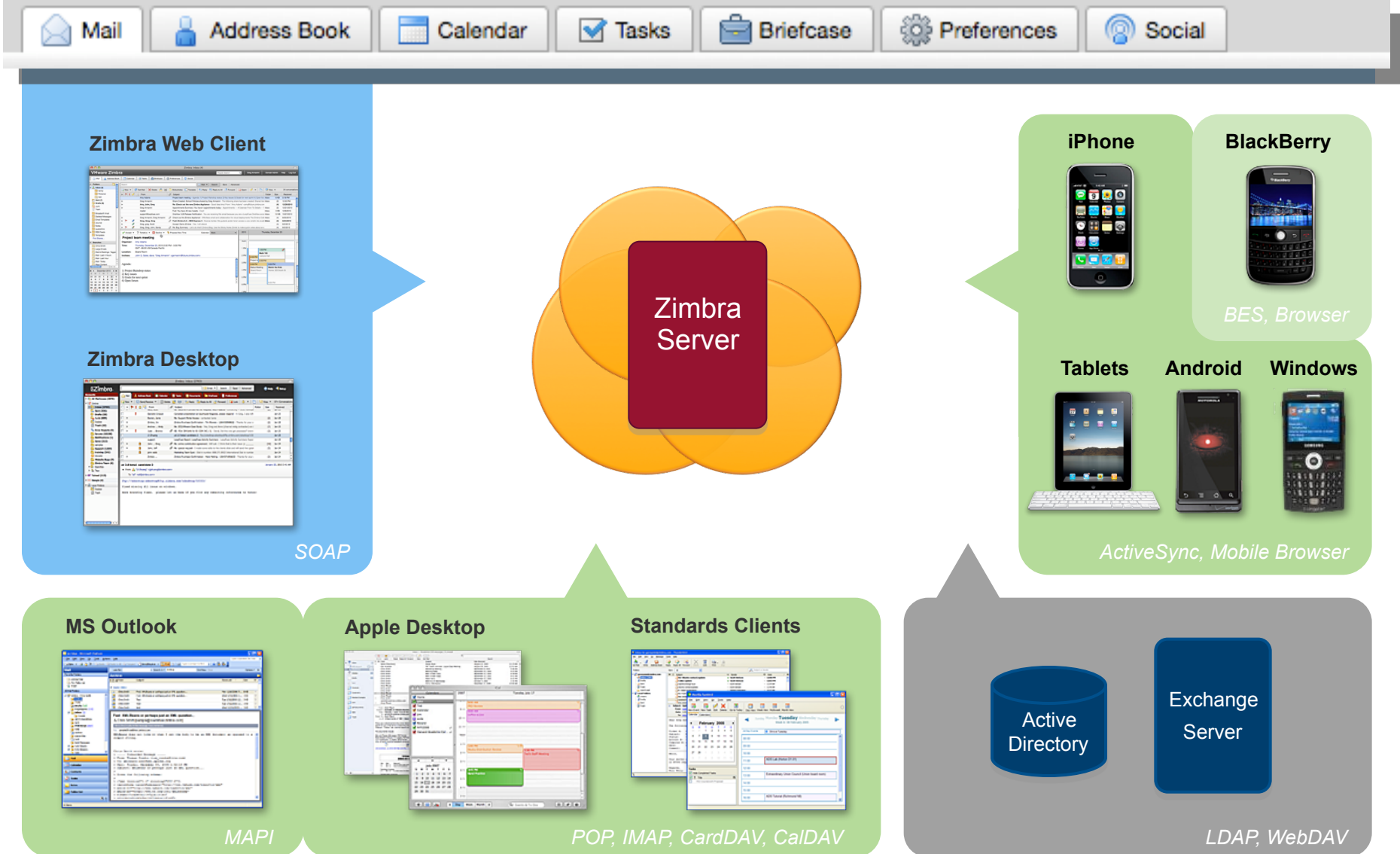
New Open Apps



Anywhere, Anytime Access



VMware Zimbra 7 Product Overview



Simple and Scalable Software

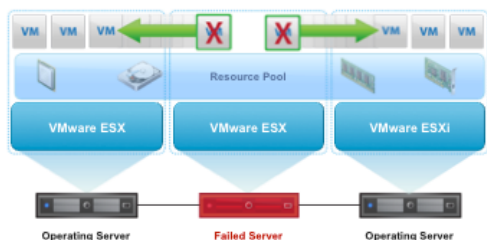


Easier Operations

- 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.™

dimdim

twitter

Google translate

skype™

facebook

webex™

BROADSOFT
Innovation calling.

flickr

digium
The Asterisk Company

SUNGARD®

ProcessMaker®
Workflow Simplified

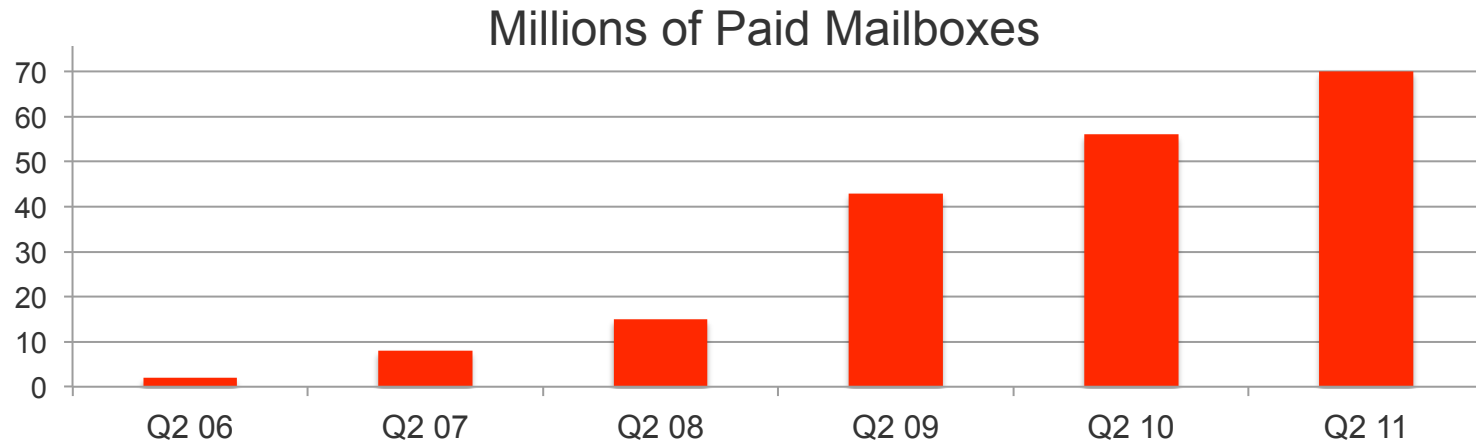
The screenshot displays the Zimbra Social interface. At the top, there's a navigation bar with tabs for Mail, Address Book, Calendar, Tasks, Briefcase, Preferences, and Social. Below this, a sidebar on the left lists 'Accounts' (Zimbra, @Zimbra (mentions), direct messages, sent messages, gregarms, @gregarms (mention), direct messages, sent messages, facebook, Add/Remove Accounts) and 'Twitter Searches' (zimbra, herrod, mashable, #ITs4U). The main content area is titled 'What are you doing?' and includes a search bar, a dropdown for 'Mail', and buttons for 'Search', 'Save', and 'Advanced'. Below the search bar, there's a section for 'update to:' with checkboxes for 'Zimbra', 'gregarms', and 'facebook'. A message states 'Just about ready to try Zimbra Desktop 2.0.1. Exciting! <http://bit.ly/g25RbO>'. There are also buttons for 'Shorten URL', 'Auto Shorten URL', and 'undo'. The bottom section shows three social media feeds: 'facebook 50+', 'mentions 50+', and 'twitter: gregarms 50+'. The Facebook feed shows a post from TechCrunch about internet services failing. The mentions feed shows tweets from @mcconnelt150 and @vmwdave. The Twitter feed shows tweets from @uncrate and @nprnews.

VMware Zimbra Continues to Build Momentum

70 million paid mailboxes

250,000 + organizations using Zimbra as SaaS

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



Major Service Providers

HSPs

ISPs

EMEA



Asia Pacific



Americas



INOVA



Your Speaker Panel



The Radicati Group, Inc.
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- ▶ **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

Thank You!



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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