

THE RADICATI GROUP, INC.
A TECHNOLOGY MARKET RESEARCH FIRM

Radicati Market Numbers Summary Update, Q2 2008

<http://www.radicati.com>

Cost - US\$3,000 by company P.O. or \$2,500 by credit card

A quantitative report published on a quarterly basis, which includes *market share* and *forecast* data on all core markets and segments tracked by The Radicati Group, Inc. This report features:

☒ Market Share and Four Year Forecasts for the following:

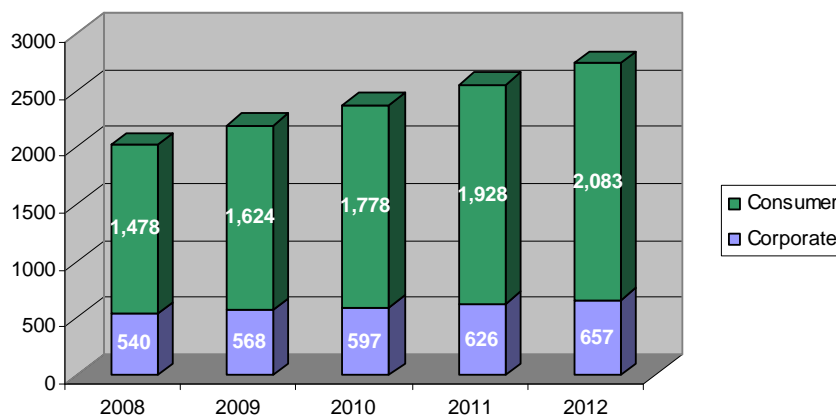
- Messaging Software
- Email Clients
- Instant Messaging
- Hosted Email
- Email Security
- Unified Communications
- Identity Management
- Email Archiving
- Wireless Email
- Corporate Web Security

☒ 2008-2012 Key Email Statistics, such as:

- Worldwide Mailbox Installed Base and Forecasts
- Email Traffic Volumes
- Spam Volumes
- Corporate vs. Consumer Mailboxes
- Insourced vs. Outsourced Mailboxes
- Email User Demographics

This report is intended for Corporate Customers, Vendors, and Investors that need to make informed decisions about the messaging and collaboration industry.

Corporate vs. Consumer Mailboxes, 2008-2012



Headquarters: 595 Lytton Avenue
Palo Alto, CA 94301
phone: (650) 322-8059
fax: (650) 322-8061

Europe: 29E Fitzjohns Avenue
London NW3 5JY, UK
phone: +44 (0) 20 7794-4298
fax: +44 (0) 20 7431-9375

About The Radicati Group, Inc.

The Radicati Group covers all aspects of email security, email archiving, regulatory compliance, wireless technologies, web services, identity management, instant messaging, unified communications, VoIP, and more. The company provides both quantitative and qualitative information, including detailed market size, installed base and forecast information on a worldwide basis, as well as detailed country breakouts.

The Radicati Group works with corporate organizations to assist them in selecting the right products and technologies to support their business needs, as well as with vendors to define the best strategic direction for their products. We also work with investment firms on a worldwide basis to help them identify and assess new investment opportunities.

The Radicati Group, Inc. is headquartered in Palo Alto, CA, with a Hong Kong Office, European office in London, UK and an Australian office in Melbourne.

ORDER FORM *To order, please fill out the following form and return it to The Radicati Group at the address or fax shown on the front.*

| | | |
|--|---|------------|
| Market Numbers Summary Update, Q2 2008 | <i>Name</i> | |
| Cost (circle one): P.O \$3,000 Credit Card \$2,500 | <i>Company</i> | |
| International Orders: Payment must be in US dollars, drawn on a US bank and must include bank routing numbers. | <i>Address</i> | |
| Payment Method: <input type="checkbox"/> Payment Enclosed | <i>Please indicate street address - NO P.O. BOX please!</i> | |
| <input type="checkbox"/> Please send invoice, P.O.#: | <i>City, State, Zip</i> | |
| <input type="checkbox"/> VISA <input type="checkbox"/> MasterCard <input type="checkbox"/> Amex | <i>Country</i> | |
| <i>Card Number:</i> <i>Exp. Date:</i> | <i>Phone</i> | <i>Fax</i> |
| <i>Signature</i> | <i>Email</i> | |

PLEASE SEE FOLLOWING PAGES FOR THE REPORT’S FULL TABLE OF CONTENTS

TABLE OF CONTENTS

| | |
|--|-----------|
| LIST OF TABLES | 4 |
| LIST OF FIGURES..... | 6 |
| SCOPE | 7 |
| METHODOLOGY | 9 |
| EXECUTIVE SUMMARY | 10 |
| FORECAST SUMMARY | 12 |
| CHAPTER 1: EMAIL STATISTICS | 17 |
| 1.1 WORLDWIDE MAILBOX INSTALLED BASE AND FORECAST | 17 |
| 1.2 EMAIL TRAFFIC VOLUMES AND FORECAST | 19 |
| 1.2.1 <i>Worldwide Spam Traffic</i> | 20 |
| 1.3 INSOURCED VS. OUTSOURCED MAILBOX INSTALLED BASE AND FORECAST | 21 |
| 1.4 CORPORATE VS. CONSUMER MAILBOXES..... | 23 |
| 1.5 CORPORATE MAILBOXES BY BUSINESS SIZE | 24 |
| 1.6 EMAIL DEMOGRAPHICS..... | 26 |
| 1.6.1 <i>Email Users by Region</i> | 26 |
| CHAPTER 2: MESSAGING AND COLLABORATION MARKET..... | 28 |
| 2.1 MESSAGING AND COLLABORATION..... | 29 |
| 2.2 EMAIL CLIENTS..... | 31 |
| 2.2.1 <i>Desktop Email Clients</i> | 33 |
| 2.2.2 <i>Consumer Webmail Clients</i> | 35 |
| 2.2.3 <i>Corporate Webmail Clients</i> | 37 |
| CHAPTER 3: INSTANT MESSAGING..... | 38 |
| 3.1 ENTERPRISE IM VENDORS | 39 |
| 3.2 IM MANAGEMENT VENDORS | 41 |
| 3.3 PUBLIC IM NETWORK PROVIDERS | 43 |
| CHAPTER 4: HOSTED EMAIL | 45 |
| 4.1 HOSTED BUSINESS EMAIL PROVIDERS | 47 |
| 4.2 MANAGED BUSINESS EMAIL PROVIDERS | 49 |
| 4.3 WEBMAIL/ISP PROVIDERS | 51 |
| CHAPTER 5: EMAIL PLATFORM SUPPLIERS FOR SERVICE PROVIDERS | 53 |
| 5.1 EMAIL PLATFORM SUPPLIERS | 54 |
| CHAPTER 6: EMAIL ARCHIVING..... | 56 |
| 6.1 EMAIL ARCHIVING VENDORS..... | 57 |
| 6.2 HOSTED EMAIL ARCHIVING SERVICES | 59 |
| CHAPTER 7: EMAIL SECURITY | 61 |
| 7.1 EMAIL SECURITY SOFTWARE VENDORS..... | 62 |
| 7.2 EMAIL SECURITY APPLIANCE VENDORS | 64 |
| 7.3 HOSTED EMAIL SECURITY SERVICES | 66 |
| CHAPTER 8: UNIFIED COMMUNICATIONS..... | 68 |
| 8.1 ON-PREMISES CORPORATE UC VENDORS..... | 69 |

| | |
|--|-----------|
| 8.2 HOSTED UC SERVICE PROVIDERS | 71 |
| 8.3 TELECOM UC SERVICE PROVIDERS..... | 73 |
| 8.4 UC SUPPLIERS TO SERVICE PROVIDERS | 75 |
| CHAPTER 9: IDENTITY MANAGEMENT | 77 |
| 9.2 PROVISIONING VENDORS | 80 |
| 9.3 SECURE ACCESS AND AUTHENTICATION VENDORS | 82 |
| CHAPTER 10: WIRELESS EMAIL..... | 84 |
| 10.1 CORPORATE WIRELESS EMAIL MARKET | 85 |
| 10.2 WIRELESS PLATFORMS..... | 87 |
| 10.3 WIRELESS EMAIL DEVICES | 89 |
| CHAPTER 11: CORPORATE WEB SECURITY..... | 91 |
| 11.1 CORPORATE WEB SECURITY MARKET | 92 |

List of Tables

| | |
|---|-----------|
| <i>Table 1: Worldwide Active Mailboxes and Users, 2008 – 2012</i> | <i>17</i> |
| <i>Table 2: Email Traffic Volume and Forecast, 2008 – 2012</i> | <i>19</i> |
| <i>Table 3: Worldwide Spam Traffic, 2008 - 2012</i> | <i>20</i> |
| <i>Table 4: Insourced vs. Outsourced Mailboxes, 2008 - 2012</i> | <i>21</i> |
| <i>Table 5: Corporate vs. Consumer Mailboxes, 2008 - 2012</i> | <i>23</i> |
| <i>Table 6: Corporate Mailboxes by Business Size, 2008 - 2012</i> | <i>24</i> |
| <i>Table 7: Email Accounts by Region, 2008 - 2012</i> | <i>26</i> |
| <i>Table 8: Messaging and Collaboration Market – Market Share, 2008</i> | <i>29</i> |
| <i>Table 9: Messaging and Collaboration Market – IB and Revenue Forecast, 2008 – 2012..</i> | <i>30</i> |
| <i>Table 10: Worldwide Email Clients – Installed Base Forecast, 2008 – 2012.</i> | <i>32</i> |
| <i>Table 11: Desktop Email Clients – Market Share, 2008.....</i> | <i>33</i> |
| <i>Table 12: Consumer Webmail Clients – Market Share, 2008.....</i> | <i>35</i> |
| <i>Table 13: Corporate Webmail Clients – Market Share, 2008.....</i> | <i>37</i> |
| <i>Table 14: Enterprise IM Vendors – Market Share, 2008.....</i> | <i>39</i> |
| <i>Table 15: Enterprise IM Vendors – IB and Revenue Forecast, 2008 - 2012</i> | <i>40</i> |
| <i>Table 16: IM Management Vendors – Market Share, 2008</i> | <i>41</i> |
| <i>Table 17: IM Management Vendors - IB and Revenue Forecast, 2008 - 2012.....</i> | <i>42</i> |
| <i>Table 18: Public IM Network Providers – Market Share, 2008.....</i> | <i>43</i> |
| <i>Table 19: Public IM Network Providers - Installed Base Forecast, (M) 2008 - 2012.....</i> | <i>44</i> |
| <i>Table 20: Hosted Business Email Providers – Market Share, 2008</i> | <i>47</i> |
| <i>Table 21: Hosted Business Email Providers – IB and Revenue Forecast, 2008 - 2012</i> | <i>48</i> |
| <i>Table 22: Managed Business Email Providers – Market Share, 2008.....</i> | <i>49</i> |
| <i>Table 23: Managed Business Email Providers – IB and Revenue Forecast, 2008 - 2012.....</i> | <i>50</i> |
| <i>Table 24: Webmail/ISP– Market Share, 2008.....</i> | <i>51</i> |
| <i>Table 25: Worldwide Webmail/ISP Services – Installed Base Forecast, 2008 - 2012.....</i> | <i>52</i> |
| <i>Table 26: Email Platform Suppliers – Market Share, 2008</i> | <i>54</i> |
| <i>Table 27: Worldwide Email Platform Suppliers – Installed Base Forecast, 2008 – 2012</i> | <i>55</i> |
| <i>Table 28: Email Archiving Vendors – Market Share, 2008</i> | <i>57</i> |
| <i>Table 29: Email Archiving Vendors – IB and Revenue Forecast, 2008 – 2012.....</i> | <i>58</i> |
| <i>Table 30: Hosted Email Archiving Services – Market Share, 2008.....</i> | <i>59</i> |
| <i>Table 31: Hosted Email Archiving Services – IB and Revenue Forecast, 2008 – 2012</i> | <i>60</i> |
| <i>Table 32: Email Security Software Vendors – Market Share, 2008.....</i> | <i>62</i> |
| <i>Table 33: Email Security Software Vendors – IB and Revenue Forecast, 2008 – 2012</i> | <i>63</i> |
| <i>Table 34: Email Security Appliance Vendors – Market Share, 2008.....</i> | <i>64</i> |
| <i>Table 35: Email Security Appliance Vendors – IB and Revenue Forecast, 2008 – 2012</i> | <i>65</i> |
| <i>Table 36: Hosted Email Security Services – Market Share, 2008.....</i> | <i>66</i> |
| <i>Table 37: Hosted Email Security Services – IB and Revenue Forecast, 2008 – 2012</i> | <i>67</i> |
| <i>Table 38: On-Premises Corporate UC Vendors – Market Share, 2008.....</i> | <i>69</i> |
| <i>Table 39: On-Premises Corp. UC Vendors – IB and Rev. Forecast, 2008 – 2012.....</i> | <i>70</i> |
| <i>Table 40: Hosted UC Service Providers – Market Share, 2008.....</i> | <i>71</i> |
| <i>Table 41: Hosted UC Service Providers – IB and Revenue Forecast, 2008 – 2012.....</i> | <i>72</i> |
| <i>Table 42: Telecom UC Service Providers – Market Share, 2008</i> | <i>73</i> |
| <i>Table 43: Telecom UC Service Providers – IB and Revenue Forecast, 2008 – 2012.....</i> | <i>74</i> |

| | |
|---|-----------|
| <i>Table 44: UC Suppliers to Service Providers – Market Share, 2008.....</i> | <i>75</i> |
| <i>Table 45: UC Suppliers to Service Providers – Revenue Forecast, 2008 – 2012.....</i> | <i>76</i> |
| <i>Table 46: Full Suite Identity Management Vendors – Market Share, 2008.....</i> | <i>78</i> |
| <i>Table 47: Full Suite Identity Management Solutions – Revenue Forecast, 2008 - 2012</i> | <i>79</i> |
| <i>Table 48: Provisioning Vendors – Market Share, 2008.....</i> | <i>80</i> |
| <i>Table 49: Provisioning Products Market – Revenue Forecast, 2008 - 2012</i> | <i>81</i> |
| <i>Table 50: Secure Access and Authentication Vendors – Market Share, 2008</i> | <i>82</i> |
| <i>Table 51: Secure Access and Authentication – Revenue Forecast, 2008 - 2012</i> | <i>83</i> |
| <i>Table 52: Wireless Email Vendors – Market Share, 2008</i> | <i>85</i> |
| <i>Table 53: Corporate Wireless Email Vendors – IB and Revenue Forecast, 2008 - 2012.....</i> | <i>86</i> |
| <i>Table 54: Wireless Platforms – Market Share, 2008</i> | <i>87</i> |
| <i>Table 55: Wireless Platforms – Installed Base Forecast, 2008 - 2012</i> | <i>88</i> |
| <i>Table 56: Wireless Email Device Vendors – Market Share, 2008</i> | <i>89</i> |
| <i>Table 57: Wireless Email Device Vendors – IB and Revenue Forecast, 2008 - 2012</i> | <i>90</i> |
| <i>Table 58: Corporate Web Security – Market Share, 2008.....</i> | <i>92</i> |
| <i>Table 59: Corporate Web Security – IB and Revenue Forecast, 2008 - 2012</i> | <i>93</i> |

List of Figures

| | |
|---|----|
| Figure 1: Worldwide Email Accounts vs. Users Forecast, 2008 - 2012 | 18 |
| Figure 2: Worldwide Email Messages per Day (billions), 2008 - 2012 | 19 |
| Figure 3: Mailbox Forecast by Type (Insourced and Outsourced), 2008 - 2012 | 22 |
| Figure 4: Corporate vs. Consumer Mailboxes Forecast, 2008 - 2012..... | 23 |
| Figure 5: Corporate Mailboxes by Business Size, 2008..... | 25 |
| Figure 6: Email Users by Region, 2008 & 2012 | 27 |
| Figure 7: Messaging and Collaboration Market Revenue, 2008 - 2012..... | 28 |
| Figure 8: Messaging and Collaboration Market – Installed Base Market Share, 2008..... | 30 |
| Figure 9: Desktop Email Clients – Installed Base Market Share, 2008 | 34 |
| Figure 10: Consumer Webmail Clients, Installed Base Market share, 2008..... | 36 |
| Figure 11: Corporate Webmail Clients – Installed Base Market Share, 2008 | 37 |
| Figure 12: Instant Messaging – Revenue (\$M) by Market Segment, 2008 - 2012 | 38 |
| Figure 13: Enterprise IM Vendors – Installed Base Market Share, 2008..... | 40 |
| Figure 14: IM Management Vendors – Installed Base Market Share, 2008..... | 42 |
| Figure 15: Public IM Network Providers – Installed Base Market Share, 2008..... | 43 |
| Figure 16: Hosted Business E-mail Revenue, 2008-2011 | 46 |
| Figure 17: E-mail Platform Suppliers Revenue, 2008-2012 | 53 |
| Figure 18: Email Archiving Market Revenue, 2008 - 2012 | 56 |
| Figure 19: Email Archiving Vendors – Installed Base Market Share, 2008..... | 58 |
| Figure 20: Hosted Email Archiving Services – Installed Base Market Share, 2008 | 59 |
| Figure 21: Email Security Market – Revenue by Segment, 2008 - 2012..... | 61 |
| Figure 22: Email Security Software Vendors – Installed Base Market Share, 2008 | 63 |
| Figure 23: Email Security Appliance Vendors – Installed Base Market Share, 2008 | 65 |
| Figure 24: Hosted Email Security Services – Installed Base Market Share, 2008 | 67 |
| Figure 25: Unified Communications Market – Revenue by Segment, 2008 - 2012 | 68 |
| Figure 26: On-Premises Corporate UC Vendors – Installed Base Market Share, 2008..... | 70 |
| Figure 27: Hosted UC Service Providers – Installed Base Market Share, 2008..... | 71 |
| Figure 28: Telecom UC Service Providers – Installed Base Market Share, 2008..... | 73 |
| Figure 29: UC Suppliers to Service Providers – Revenue Market Share, 2008 | 76 |
| Figure 30: Identity Management Market – Revenue by Segment, 2008 - 2012 | 77 |
| Figure 31: Full Suite Identity Management Vendors – Revenue Market Share, 2008..... | 79 |
| Figure 32: Provisioning Vendors – Revenue Market Share, 2008..... | 81 |
| Figure 33: Secure Access and Authentication Vendors – Revenue Market Share, 2008..... | 83 |
| Figure 34: Worldwide Wireless Email Market Revenue, 2008 - 2012..... | 84 |
| Figure 35: Wireless Email Vendors – Installed Base Market Share, 2008..... | 86 |
| Figure 36: Wireless Platform Vendors – Installed Base Market Share, 2008 | 87 |
| Figure 37: Wireless Email Device Vendors – Installed Base Market Share, 2008..... | 90 |
| Figure 38: Corporate Web Security Market Revenue, 2008-2012..... | 91 |
| Figure 39: Corporate Web Security – Installed Base Market Share, 2008..... | 93 |