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Microsoft SharePoint Analysis, 2009-2013

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SCOPE

This study examines the market for Windows SharePoint Services and Microsoft Office SharePoint Server in both the On-Premises and Hosted Collaboration Market. This study provides extensive 2009 data regarding installed base, broken out by business size, region, version, and other variables, along with four year forecasts. This report also examines the features, strategies, strengths and weaknesses of Windows SharePoint Services 3.0 and Microsoft Office SharePoint Server 2007.

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

All market numbers, such as market size, forecasts, installed base, revenue information, and any financial information presented in this study represent *worldwide* figures, unless otherwise indicated. All revenue numbers are expressed in \$USD.

METHODOLOGY

The information and analysis in this report is based on primary research conducted by The Radicati Group, Inc. It consists of information collected from a variety of on-going surveys.

Secondary research sources have also been used, where appropriate, to cross-check the information collected. These include company annual reports and market size information from various market segments of the computer industry.

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EXECUTIVE SUMMARY

- This report examines the penetration of Microsoft SharePoint in both the On-Premises and Hosted Collaboration Market.
- In this report, Microsoft SharePoint refers to two products; Windows SharePoint Services (WSS) and Microsoft Office SharePoint Server (MOSS).
 - Windows SharePoint Services refers to the whole Windows SharePoint Services family, including SharePoint Team Services, Windows SharePoint Services 2.0, and Windows SharePoint Services 3.0 unless otherwise stated.
 - Microsoft Office SharePoint Server refers to the whole Microsoft Office SharePoint Server family, including SharePoint Portal Server 2001, SharePoint Portal Server 2003, and Microsoft Office SharePoint Server unless otherwise stated.
- Microsoft's Windows SharePoint Services is an extension of Windows Server, aimed at providing collaboration functionality to small and medium-sized organizations. Over the next four years, the installed base of Windows SharePoint Services is expected to grow an average annual growth rate of 7%.
 - One of the primary reasons organizations deploy Windows SharePoint Services is for its basic document management features, which include document library services to check documents in and out, as well as Information Rights Management (IRM) to control the actions users are allowed to take.
 - Collaboration tools are widely available in Windows SharePoint Services, which enable employees to create workspaces, share calendars and contacts, and make use of Web 2.0 technologies, such as blogs, wikis, and RSS (Really Simple Syndication) feeds.
- Microsoft Office SharePoint Server is an extension of Windows SharePoint Services, and therefore requires Windows SharePoint Services. This means that Microsoft Office SharePoint Server seats and Windows SharePoint Services seats overlap, as one Microsoft Office SharePoint Server seat is also a Windows SharePoint Services seat. Microsoft Office SharePoint Server is intended for medium and large-sized organizations with over 1,000 users.

- Microsoft Office SharePoint Server 2007 builds upon the basic collaborative capabilities of Windows SharePoint Services 3.0, and provides six core capabilities; Business Intelligence (BI), Business Process and Forms, Enterprise Content Management (ECM), Enterprise Search, Collaboration, and Portals.
 - Currently, Microsoft Office SharePoint Server accounts for 23% of Windows SharePoint Services users. Over the next four years, Microsoft Office SharePoint Server is expected to grow at an average annual growth rate of 25%. By year-end 2013, Microsoft Office SharePoint Server is expected to penetrate 42% of Windows SharePoint Services deployments.
- Figure 1, shows the current and forecasted distribution of Microsoft Office SharePoint Server seats by Business Size in 2009, and in 2013.

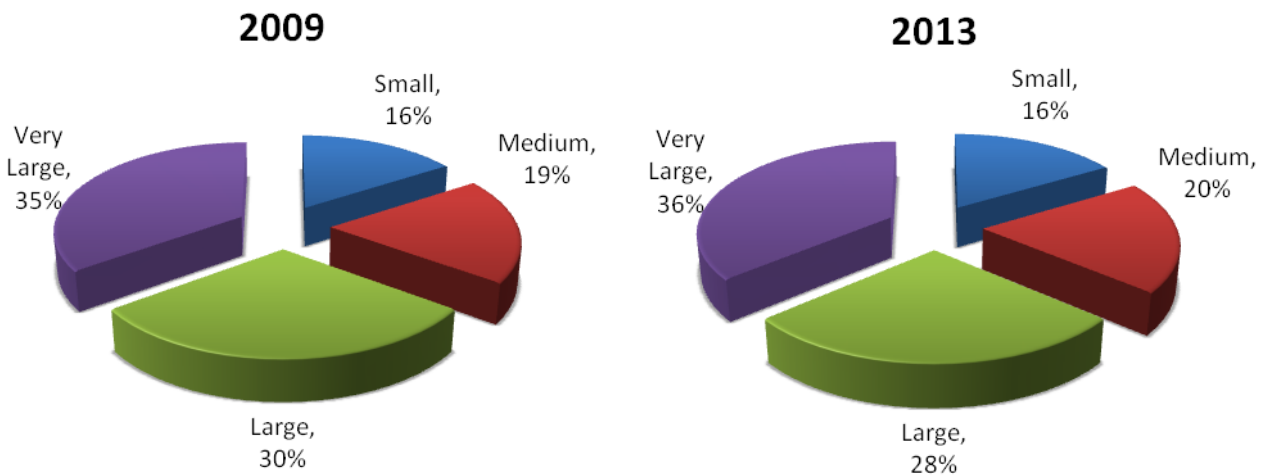


Figure 1: Worldwide On-Premises MOSS IB by Business Size, 2009 vs. 2013

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