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Microsoft SharePoint Market Analysis, 2010-2014

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SCOPE

This study examines the market for Microsoft Windows SharePoint Services and Microsoft Office SharePoint Server in both the On-Premises and Hosted Collaboration Market. This study provides extensive 2010 data regarding installed base, broken out by business size, region, version, and other variables, along with four year forecasts. The report also examines the features, strategies, strengths and weaknesses of Windows SharePoint Services 3.0 and Microsoft Office SharePoint Server 2007, as well as Microsoft SharePoint Foundation 2010, and Microsoft SharePoint Server 2010.

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.

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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.

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 the following products; Windows SharePoint Services 3.0, Microsoft SharePoint Foundation 2010, Microsoft Office SharePoint Server 2007, and Microsoft SharePoint Server 2010.
 - Windows SharePoint Services (WSS) refers to the whole Windows SharePoint Services family, including SharePoint Team Services, Windows SharePoint Services 2.0, Windows SharePoint Services 3.0, and Microsoft SharePoint Foundation 2010 unless otherwise stated.
 - Microsoft Office SharePoint Server (MOSS) refers to the whole Microsoft Office SharePoint Server family, including SharePoint Portal Server 2001, SharePoint Portal Server 2003, Microsoft Office SharePoint Server 2007, and Microsoft SharePoint Server 2010 unless otherwise stated.
- Windows SharePoint Services is a component of Windows Server. WSS is a web portal that provides businesses with the following features: Collaboration tools, Shared Calendars, Blogs and Wikis, Document Management, and more. We expect the installed base of Windows SharePoint Services to grow at an average annual rate of 11% over the next four years.

- Windows SharePoint Services focuses on providing Collaboration tools that increase productivity among workgroups or teams of users. Document Libraries are a key feature that is very popular among Windows SharePoint Services users.
- Microsoft Office SharePoint Server builds on Windows SharePoint Services, and provides six key components; Collaboration, Portal, Enterprise Search, Enterprise Content Management, Enterprise Content Management and Forms, and Business Intelligence (BI).
 - Microsoft Office SharePoint Server tightly integrates with Microsoft Office applications, such as Outlook, for synchronized Outlook and SharePoint calendars, and Excel where worksheets can be saved to a SharePoint site and accessed using a browser.
 - Microsoft Office SharePoint Server requires an additional software investment, and is intended for businesses that need an advanced collaboration and productivity solution. Microsoft Office SharePoint Server is most often deployed by medium to large-sized organizations.
 - In 2010, 28% of organizations deploying Windows SharePoint Services have also deployed Microsoft Office SharePoint Server. By 2014, we expect that 54% of organizations using Windows SharePoint Services will also deploy Microsoft Office SharePoint Server.

- Figure 1, shows the current and forecasted distribution of Microsoft Office SharePoint Server seats by Business Size in 2010, and in 2014.

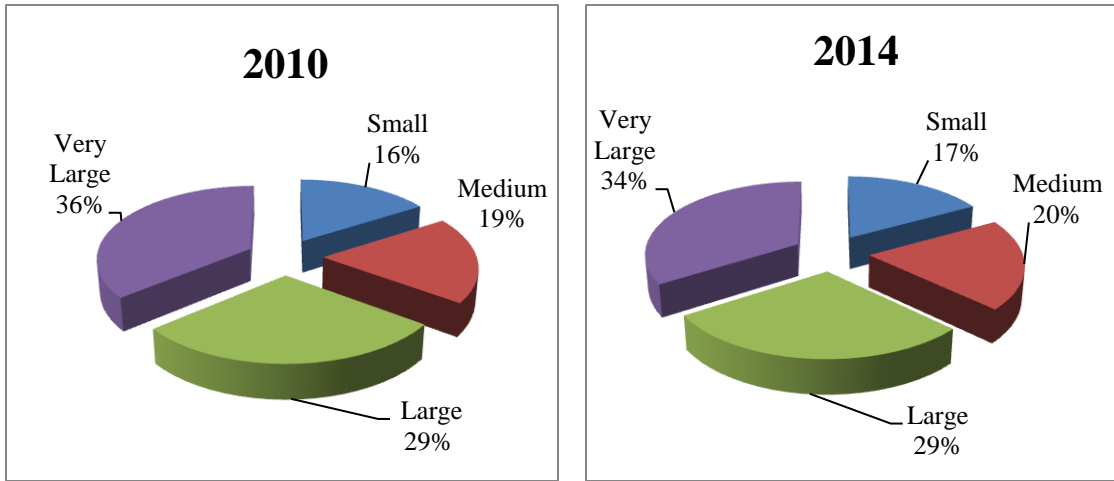


Figure 1: Worldwide On-Premises MOSS IB by Business Size, 2010 vs. 2014

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