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## ***On-Premises Email and Collaboration Market, 2010-2014***

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### **SCOPE**

This study provides an analysis of the On-Premises Email and Collaboration market in 2010, and its potential growth over the next four years. It provides market size, installed base and revenue market share by vendor, and forecasted market growth in terms of installed base and revenues, from 2010 to 2014. The study also provides an analysis of key vendors.

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

Throughout this report, the terms ‘email’ and ‘messaging’ are used interchangeably.

### **METHODOLOGY**

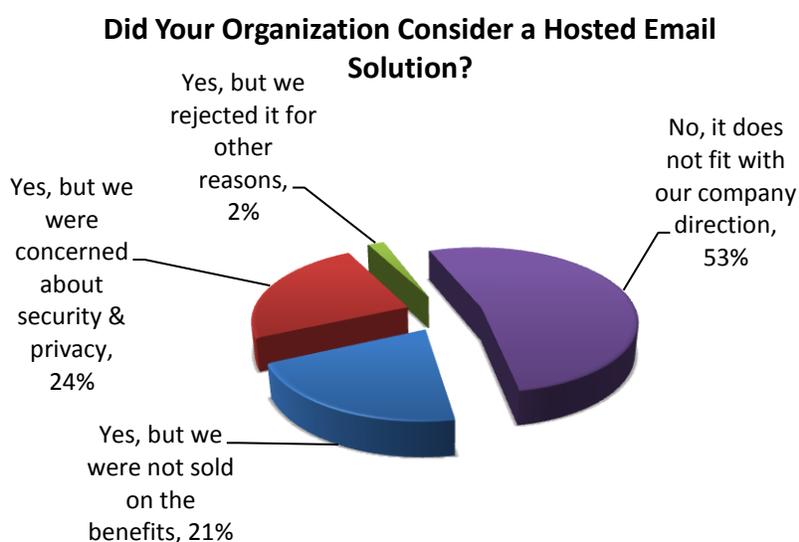
The information and analysis in this report is based on primary research conducted by The Radicati Group, Inc in late 2010. It consists of information collected from vendors and users in global corporations via interviews and surveys.

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

- The worldwide installed base for corporate on-premises email has reached 550 million mailboxes in 2010, and is expected to increase at an average annual growth rate of 6% over the next four years. The On-Premises Email and Collaboration market continues to grow at a steady pace due to the following reasons:
  - Strong economic growth in emerging regions, such as Asia Pacific, Latin America, Middle East, and Eastern Europe, is the leading driver for increased email adoption by a larger workforce that relies on email for their daily business communications.
  - In highly developed markets, such as North America and Western Europe, growth is driven mainly by the expansion of email to workers who may not have had access to email in the past, such as deskless blue collar or retail workers.
- On-premises email platforms are continuing to evolve to include advanced features for high availability (HA) and disaster recovery (DR), anti-virus and spam filtering protection, email archiving, instant messaging (IM), social network integration, web conferencing, unified communications (UC), wireless push email, and more.
- Email remains an essential part of everyday business communications. With an increasingly mobile workforce, end-users must be able to access all their critical inbox data (email messages, calendars, contacts, and tasks) at all times, regardless of location. Messaging vendors are improving the synchronization of more and more data across traditional desktop clients, web browsers, as well as mobile devices.
  - In the past, webmail clients were predominantly used by consumer users. However, webmail clients have increasingly found their way into the corporate world. Webmail clients allow end-users to easily access their emails when they are out-of-the-office.
  - The increased penetration of 3G networks worldwide, as well as the widespread adoption of smartphones based on Apple iOS, RIM BlackBerry, and Google Android, Symbian, and Windows Mobile have made access from mobile devices much easier. Mobile access has become a major consideration for organizations looking to migrate to a new email platform, or the next version of their existing platform.

- On-premises email and collaboration platforms are facing increasing pressure from cloud-based email services. Ever since Google and Microsoft entered the Hosted Email market, many organizations have begun evaluating the move to hosted business email solutions. However, the vast majority of corporate organizations are still weary of making this move. Organizations still enjoy the sense of ownership, security and control associated with on-premises platforms.
  - A recent survey of 100 organizations worldwide<sup>1</sup> showed that 47% of organizations currently deploying an on-premises solutions have considered hosted email solutions, but, in the end, have rejected migrating over, primarily due to concerns about security and privacy. Figure 1, shows the full results to this survey question.



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<sup>1</sup> The Radicati Group, Inc., *Corporate IT Survey – Messaging and Collaboration, 2010-2014* (August 2010)