

THE RADICATI GROUP, INC.  
A TECHNOLOGY MARKET RESEARCH FIRM

## **Microsoft Exchange Server and Outlook Market Analysis, 2011-2015**

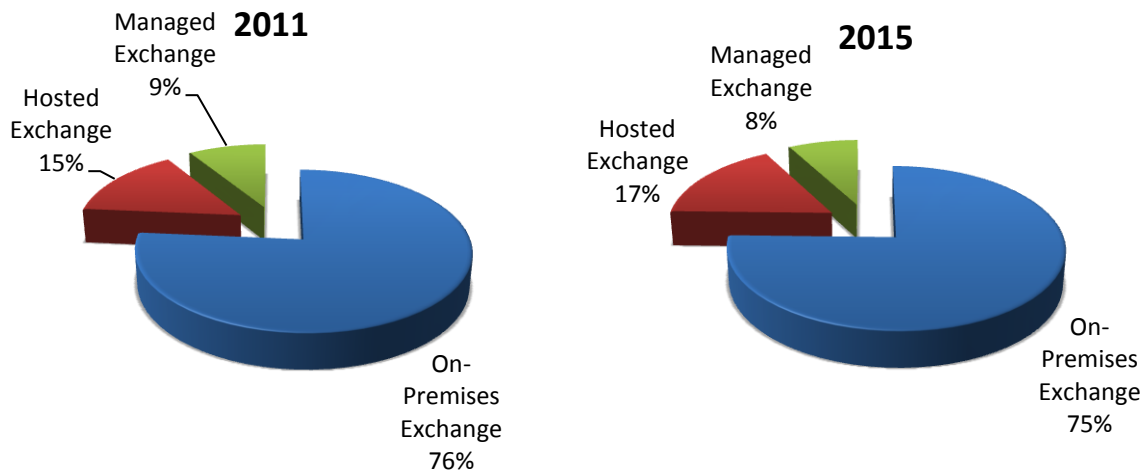
<http://www.radicati.com>

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

A comprehensive analysis of Microsoft Exchange Server in both the On-Premises and Hosted Messaging and Collaboration market, including:

- ☒ Installed Base, Revenue and Four-Year Forecasts:
  - Worldwide On-Premise and Hosted Mailboxes
  - Vertical Industry Breakouts
  - Business Size Breakouts – Installed Base and Forecasts
  - Regional Breakouts – Installed Base and Forecasts
  - Version Breakouts – Installed Base and Forecasts
- ☒ Product Analysis, including Strength and Weaknesses for Microsoft Exchange Server 2010, Microsoft Office 365, Microsoft Business Productivity Online Suite (BPOS), Microsoft Outlook 2010, Microsoft Outlook Web App (OWA) 2010, Windows Live Hotmail.

This report is intended for Investors, Corporate Customers and Vendors who need to make informed decisions about Messaging and Collaboration.



Headquarters: 1900 Embarcadero Road, Suite 206  
Palo Alto, CA 94303  
phone: (650) 322-8059  
fax: (650) 352-2201

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

## TABLE OF CONTENTS

<b>SCOPE .....</b>	<b>8</b>
<b>METHODOLOGY .....</b>	<b>9</b>
<b>EXECUTIVE SUMMARY .....</b>	<b>10</b>
<b>CHAPTER 1: MICROSOFT EXCHANGE SERVER MARKET DATA .....</b>	<b>12</b>
1.1 WORLDWIDE MAILBOXES .....	13
1.2 WORLDWIDE MICROSOFT EXCHANGE SERVER MAILBOXES AND REVENUES .....	19
1.3 WORLDWIDE MICROSOFT EXCHANGE SERVER INSTALLED BASE BY INDUSTRY .....	24
1.4 MICROSOFT EXCHANGE IN THE ON-PREMISES MARKET .....	26
1.4.1 <i>ON-PREMISES MICROSOFT EXCHANGE INSTALLED BASE BY REGION</i> .....	29
1.4.2 <i>ON-PREMISES MICROSOFT EXCHANGE INSTALLED BASE BY BUSINESS SIZE</i> .....	31
1.4.2.1 <i>WORLDWIDE</i> .....	31
1.4.2.2 <i>NORTH AMERICA</i> .....	33
1.4.2.3 <i>EUROPE</i> .....	34
1.4.2.4 <i>ASIA PACIFIC</i> .....	35
1.4.2.5 <i>REST OF WORLD</i> .....	36
1.4.3 <i>ON-PREMISES MICROSOFT EXCHANGE SERVER INSTALLED BASE BY VERSION</i> .....	37
1.4.3.1 <i>WORLDWIDE</i> .....	37
1.4.3.2 <i>NORTH AMERICA</i> .....	40
1.4.3.3 <i>EUROPE</i> .....	41
1.4.3.4 <i>ASIA PACIFIC</i> .....	42
1.4.3.5 <i>REST OF WORLD</i> .....	43
1.5 MICROSOFT EXCHANGE SERVER IN THE HOSTED MARKET .....	44
1.5.1 <i>MICROSOFT HOSTED EXCHANGE IN THE HOSTED BUSINESS EMAIL SEGMENT</i> .....	46
1.5.1.1 <i>MICROSOFT HOSTED EXCHANGE INSTALLED BASE BY REGION</i> .....	48
1.5.1.1.1 <i>WORLDWIDE</i> .....	48
1.5.1.2 <i>MICROSOFT HOSTED EXCHANGE INSTALLED BASE BY BUSINESS SIZE</i> .....	51
1.5.1.2.1 <i>WORLDWIDE</i> .....	51
<b>CHAPTER 2: MICROSOFT OFFICE OUTLOOK MARKET DATA .....</b>	<b>54</b>
2.1 WORLDWIDE EMAIL CLIENTS .....	55
2.2 WORLDWIDE MICROSOFT OUTLOOK CLIENTS .....	57
2.2.1 <i>MICROSOFT EMAIL CLIENT INSTALLED BASE BY VERSION</i> .....	60
2.2.2 <i>MICROSOFT OUTLOOK INSTALLED BASE BY REGION</i> .....	63
2.2.3 <i>MICROSOFT OUTLOOK INSTALLED BASE BY BUSINESS SIZE</i> .....	65
<b>CHAPTER 3: MICROSOFT EXCHANGE SERVER AND OUTLOOK PRODUCT OVERVIEW .....</b>	<b>68</b>
3.1 MICROSOFT EXCHANGE SERVER .....	69
3.1.1 <i>MICROSOFT EXCHANGE SERVER 2010</i> .....	69
3.1.1.1 <i>LOWER IT COSTS</i> .....	70
3.1.1.1.1 <i>HIGH AVAILABILITY (HA) AND DISASTER RECOVERY (DR)</i> .....	70
3.1.1.1.2 <i>STORAGE</i> .....	71

3.1.1.1.3	ADMINISTRATIVE CAPABILITIES .....	72
3.1.1.1.4	EMAIL SECURITY .....	73
3.1.1.2	ANYWHERE ACCESS .....	73
3.1.1.2.1	OUTLOOK WEB APP (OWA) .....	73
3.1.1.2.2	UNIFIED MESSAGING (UM).....	74
3.1.1.2.3	EXCHANGE ACTIVESYNC (EAS).....	74
3.1.1.3	ARCHIVING RETENTION AND DISCOVERY.....	75
3.1.1.4	SERVICE PACK 1 (SP1) ENHANCEMENTS .....	76
3.1.1.4.1	ARCHIVING RETENTION AND DISCOVERY.....	76
3.1.1.4.2	OUTLOOK WEB APP .....	77
3.1.1.4.3	MICROSOFT EXCHANGE ACTIVESYNC (EAS).....	77
3.1.1.4.4	MANAGEMENT USER INTERFACE (UI) .....	78
3.1.1.4.5	MULTI-TENANT CAPABILITIES.....	78
3.1.1.5	PRICING.....	79
3.1.1.5.1	ON-PREMISES .....	79
3.1.1.5.2	SERVICE PROVIDERS.....	80
3.1.1.6	MICROSOFT EXCHANGE SERVER STRENGTHS AND WEAKNESSES.....	80
3.1.1.6.1	STRENGTHS .....	80
3.1.1.6.2	WEAKNESSES.....	81
3.1.1.7	MICROSOFT EXCHANGE SERVER ANALYSIS .....	82
3.2	MICROSOFT ONLINE SERVICES (MOS).....	85
3.2.1	MICROSOFT BUSINESS PRODUCTIVITY ONLINE SUITE (BPOS).....	85
3.2.2	MICROSOFT OFFICE 365 .....	86
3.2.2.1	MICROSOFT OFFICE 365 PLANS .....	86
3.2.2.1.1	MICROSOFT OFFICE 365 FOR SMALL BUSINESSES .....	87
3.2.2.1.2	MICROSOFT OFFICE 365 FOR ENTERPRISES .....	87
3.2.2.1.2.1	PLANS FOR KIOSK WORKERS.....	88
3.2.2.1.3	MICROSOFT OFFICE 365 FOR EDUCATION .....	88
3.2.2.2	SERVICES .....	89
3.2.2.2.1	MICROSOFT OFFICE PROFESSIONAL PLUS ONLINE.....	89
3.2.2.2.2	MICROSOFT EXCHANGE ONLINE .....	90
3.2.2.2.3	MICROSOFT SHAREPOINT ONLINE .....	90
3.2.2.2.4	MICROSOFT LYNC ONLINE.....	91
3.2.3	PRICING.....	91
3.2.3.1	MICROSOFT BUSINESS PRODUCTIVITY ONLINE SUITE (BPOS).....	91
3.2.3.2	MICROSOFT OFFICE 365 .....	92
3.2.3.2.1	MICROSOFT OFFICE 365 FOR SMALL BUSINESSES .....	92
3.2.3.2.2	MICROSOFT OFFICE 365 FOR ENTERPRISES .....	92
3.2.3.2.2.1	PLANS FOR KIOSK WORKERS.....	93
3.2.3.2.3	MICROSOFT OFFICE 365 FOR EDUCATION .....	94
3.2.4	MICROSOFT ONLINE SERVICES (MOS) STRENGTHS AND WEAKNESSES.....	94
3.2.4.1	STRENGTHS .....	94
3.2.4.2	WEAKNESSES.....	96
3.2.5	MICROSOFT ONLINE SERVICES (MOS) ANALYSIS.....	97
3.3	MICROSOFT OUTLOOK .....	100
3.3.1	MICROSOFT OUTLOOK 2010.....	100

3.3.1.1	64-BIT EDITIONS.....	100
3.3.1.2	MICROSOFT OFFICE FLUENT USER INTERFACE (UI) .....	100
3.3.1.3	MULTIPLE ACCOUNTS.....	101
3.3.1.4	CONVERSATION VIEW .....	101
3.3.1.5	CONVERSATION ACTIONS .....	101
3.3.1.6	MAILTIPS .....	102
3.3.1.7	QUICK STEPS .....	102
3.3.1.8	CALENDAR .....	102
3.3.1.9	PERSONAL ARCHIVE .....	103
3.3.1.10	MICROSOFT OUTLOOK SOCIAL CONNECTOR (OSC).....	103
3.3.1.11	OTHER FEATURES.....	104
3.3.2	MICROSOFT OUTLOOK STRENGTHS AND WEAKNESSES .....	104
3.3.2.1	STRENGTHS .....	104
3.3.2.2	WEAKNESSES.....	105
3.3.3	MICROSOFT OUTLOOK ANALYSIS .....	106
3.4	MICROSOFT OUTLOOK WEB APP.....	108
3.4.1	MICROSOFT OUTLOOK WEB APP 2010.....	108
3.4.1.1	MICROSOFT OUTLOOK WEB APP PREMIUM.....	108
3.4.1.1.1	MULTIPLE BROWSER SUPPORT.....	108
3.4.1.1.2	EXCHANGE CONTROL PANEL (ECP) .....	109
3.4.1.1.2	NEW FEATURES INTRODUCED IN MICROSOFT OUTLOOK 2010.....	109
3.4.1.1.3	INSTANT MESSAGING .....	110
3.4.1.1.4	OTHER FEATURES.....	110
3.4.1.2	OUTLOOK WEB APP LIGHT.....	111
3.4.2	MICROSOFT OUTLOOK WEB APP STRENGTHS AND WEAKNESSES .....	111
3.4.2.1	STRENGTHS .....	111
3.4.2.2	WEAKNESSES.....	112
3.4.3	MICROSOFT OUTLOOK WEB APP ANALYSIS .....	112
3.5	WINDOWS LIVE .....	114
3.5.1	WINDOWS LIVE HOTMAIL.....	115
3.5.1.1	EMAIL SECURITY .....	115
3.5.1.2	INTERFACE.....	116
3.5.1.3	EMAIL INBOX.....	116
3.5.1.4	WINDOWS LIVE CALENDAR .....	117
3.5.1.5	WINDOWS LIVE CONTACTS.....	117
3.5.1.6	INTEGRATED INSTANT MESSAGING .....	118
3.5.1.7	MESSENGER SOCIAL .....	118
3.5.1.8	WINDOWS LIVE SKYDRIVE .....	118
3.5.1.9	MICROSOFT OFFICE WEB APPS .....	119
3.5.1.10	WINDOWS LIVE FOR MOBILE .....	119
3.5.1.11	DESKTOP SUPPORT.....	120
3.5.1.12	WINDOWS LIVE HOTMAIL PLUS.....	120
3.5.2	WINDOWS LIVE HOTMAIL STRENGTHS AND WEAKNESSES .....	121
3.5.2.1	STRENGTHS .....	121
3.5.2.2	WEAKNESSES.....	122
3.5.3	WINDOWS LIVE HOTMAIL ANALYSIS.....	122

## LIST OF FIGURES

<i>FIGURE 1: WORLDWIDE MICROSOFT EXCHANGE SERVER IB BY MAILBOX, 2011 vs. 2015</i> .....	11
<i>FIGURE 2: WORLDWIDE ACTIVE MAILBOXES BY TYPE, 2011 vs. 2015</i> .....	16
<i>FIGURE 3: WORLDWIDE BREAKOUT BY CORPORATE AND CONSUMER MAILBOXES, 2011 vs. 2015</i> .....	17
<i>FIGURE 4: MICROSOFT EXCHANGE SERVER IB BY MAILBOX TYPE, 2011 vs. 2015</i> .....	20
<i>FIGURE 5: MICROSOFT EXCHANGE SERVER REVENUE BY SEGMENT, 2011 - 2015</i> .....	23
<i>FIGURE 6: MICROSOFT EXCHANGE SERVER IB BY INDUSTRY, 2011</i> .....	25
<i>FIGURE 7: ON-PREMISES MICROSOFT EXCHANGE SERVER MARKET SHARE, 2011 vs. 2015</i> .....	27
<i>FIGURE 8: ON-PREMISES MICROSOFT EXCHANGE SERVER IB BY REGION, 2011 – 2015</i> .....	30
<i>FIGURE 9: ON-PREMISES MICROSOFT EXCHANGE SERVER IB BY REGION, 2011 vs. 2015</i> .....	30
<i>FIGURE 10: ON-PREMISES MICROSOFT EXCHANGE SERVER IB BY BUSINESS SIZE, 2011 - 2015</i> .....	32
<i>FIGURE 11: ON-PREMISES MICROSOFT EXCHANGE SERVER IB BY VERSION, 2011 - 2015</i> .....	39
<i>FIGURE 12: MICROSOFT HOSTED EXCHANGE IB BY REGION, 2011-2015</i> .....	50
<i>FIGURE 13: MICROSOFT HOSTED EXCHANGE IB BY BUSINESS SIZE, 2011-2015</i> .....	53
<i>FIGURE 14: MICROSOFT DESKTOP AND WEBMAIL EMAIL CLIENTS, 2011 – 2015</i> .....	59
<i>FIGURE 15: MICROSOFT EMAIL CLIENTS, 2011 vs. 2015</i> .....	62
<i>FIGURE 16: MICROSOFT OUTLOOK IB BY REGION, 2011 - 2015</i> .....	64
<i>FIGURE 17: MICROSOFT OUTLOOK IB BY REGION, 2011 vs. 2015</i> .....	64
<i>FIGURE 18: MICROSOFT OUTLOOK IB BY BUSINESS SIZE, 2011 vs. 2015</i> .....	67

## LIST OF TABLES

TABLE 1: WORLDWIDE ACTIVE MAILBOXES, 2011 - 2015 .....	13
TABLE 2: WORLDWIDE ACTIVE MAILBOXES BY TYPE, 2011-2015.....	15
TABLE 3: CORPORATE MAILBOXES VS. CONSUMER MAILBOXES, 2011-2015.....	17
TABLE 4: WORLDWIDE MICROSOFT EXCHANGE SERVER MAILBOXES, 2011 – 2015.....	20
TABLE 5: WORLDWIDE MICROSOFT EXCHANGE SERVER REVENUES (\$M), 2011 – 2015 .....	22
TABLE 6: MICROSOFT EXCHANGE SERVER IB BY INDUSTRY, 2011 .....	25
TABLE 7: WORLDWIDE ON-PREMISES MICROSOFT EXCHANGE SERVER MAILBOXES, 2011 - 2015 .....	26
TABLE 8: MICROSOFT EXCHANGE SERVER ENTERPRISE MESSAGING COMPETITION SUMMARY, 2011 .....	28
TABLE 9: WORLDWIDE ON-PREMISES MICROSOFT EXCHANGE SERVER IB BY BUSINESS SIZE (M), 2011 - 2015.....	32
TABLE 10: NORTH AMERICAN MICROSOFT EXCHANGE SERVER IB BY BUSINESS SIZE, 2011 – 2015.....	33
TABLE 11: EUROPEAN MICROSOFT EXCHANGE SERVER IB BY BUSINESS SIZE, 2011 – 2015.....	34
TABLE 12: ASIA PACIFIC MICROSOFT EXCHANGE SERVER IB BY BUSINESS SIZE, 2011 – 2015 .....	35
TABLE 13: ROW MICROSOFT EXCHANGE SERVER IB BY BUSINESS SIZE, 2011 - 2015 .....	36
TABLE 14: WORLDWIDE ON-PREMISES MICROSOFT EXCHANGE SERVER IB BY VERSION, 2011 - 2015 .....	38
TABLE 15: MICROSOFT EXCHANGE SERVER SUPPORT LIFECYCLE, 2011 .....	39
TABLE 16: NORTH AMERICAN MICROSOFT EXCHANGE SERVER MAILBOXES BY VERSION, 2011 – 2015.....	40
TABLE 17: EUROPEAN MICROSOFT EXCHANGE SERVER MAILBOXES BY VERSION, 2011 -2015.....	41
TABLE 18: ASIA PACIFIC MICROSOFT EXCHANGE SERVER MAILBOXES BY VERSION, 2011 – 2015 .....	42
TABLE 19: ROW MICROSOFT EXCHANGE SERVER MAILBOXES BY VERSION, 2011 - 2015 .....	43
TABLE 20: WORLDWIDE MICROSOFT HOSTED EXCHANGE SERVER MAILBOXES, 2011 – 2015 .....	45
TABLE 21: WORLDWIDE BUSINESS MICROSOFT HOSTED EXCHANGE SERVER MAILBOXES, 2011 – 2015.....	47
TABLE 22: WORLDWIDE MICROSOFT HOSTED EXCHANGE MAILBOX IB BY REGION, 2011 - 2015.....	49
TABLE 23: WORLDWIDE MICROSOFT HOSTED EXCHANGE MAILBOXES BY BUSINESS SIZE, 2011-2015 .....	52
TABLE 24: WORLDWIDE EMAIL CLIENTS, 2011 - 2015.....	55
TABLE 25: WORLDWIDE EMAIL CLIENTS BY TYPE, 2011 - 2015.....	57
TABLE 26: WORLDWIDE MICROSOFT EMAIL CLIENTS, 2011 - 2015.....	58
TABLE 27: WORLDWIDE MICROSOFT EMAIL CLIENTS, 2011 - 2015.....	61
TABLE 28: MICROSOFT OUTLOOK SUPPORT LIFECYCLE, 2011.....	62
TABLE 29: WORLDWIDE MICROSOFT OUTLOOK IB BY BUSINESS SIZE, 2011 – 2015 .....	66

