



THE RADICATI GROUP, INC.

A TECHNOLOGY MARKET RESEARCH FIRM

1900 EMBARCADERO ROAD, SUITE 206. • PALO ALTO, CA 94303

TEL. 650 322-8059 • FAX 650 322-8061

IBM Lotus Notes/Domino Market Analysis, 2011-2015

Editor: Sara Radicati, PhD; Principal Analyst: Quoc Hoang

SCOPE

This study examines the penetration of IBM Lotus Domino and Notes clients in the On-Premises Email and Collaboration market, as well as that of IBM LotusLive in the Hosted Email market. The report examines the features, strategies, strengths and weaknesses of IBM Lotus Domino Server, IBM Lotus Notes, IBM Lotus iNotes, and IBM LotusLive. For all products, this study provides extensive 2011 data regarding installed base, broken out by business size, region, version, industry, along with four year forecasts.

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.

EUROPE: 29E FITZJOHNS AVE • LONDON NW3 5JY • TEL. +44 (0)207 794 4298 •

FAX. +44 (0)207 431 9375

e-mail: sara@radicati.com

<http://www.radicati.com>

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 vendors and users within 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

- This report analyzes the penetration of the IBM Lotus Domino server and the IBM Lotus Notes collaboration client in the On-Premises Email and Collaboration market, as well as the penetration of LotusLive in the Hosted Email market.
- IBM Lotus's highly successful flagship product, Lotus Notes/Domino 8.5, focuses on optimizing resources to prolong the life of the server and drive down total cost of ownership (TCO). IBM Lotus Domino 8.5 has had one of the fastest adoption rates IBM has ever seen for IBM Lotus Domino.
- IBM Lotus is also making a strong push in the Hosted Business Email segment with its LotusLive offering. LotusLive is a suite of cloud-based messaging and collaboration services, which currently includes:
 - *LotusLive iNotes* - a secure webmail solution that provides end-users with access to email, contacts, and calendars via any web browser. Lotus iNotes, however, is not based on Lotus Notes/Domino.
 - *LotusLive Notes* - released in August 2010, is a cloud-based version of the IBM Lotus Notes/Domino platform. Currently powered by a multi-tenant version of IBM Lotus Notes/Domino 8.5, LotusLive Notes provides the same features of an on-premises Lotus Notes/Domino platform. This includes more robust email, calendar and contact

management services than the webmail-based LotusLive iNotes solution.

- In 2011, IBM Lotus Domino will have a worldwide installed base of 189 million mailboxes. Currently, the installed base for On-Premises IBM Lotus Domino mailboxes represents the majority of worldwide IBM Lotus Domino mailboxes, accounting for 87% of worldwide IBM Lotus Domino mailboxes. By 2015, this percentage is expected to decrease to 80%, as hosted email grows in popularity.
- LotusLive, comprising of LotusLive iNotes and LotusLive Notes, account for 4% of worldwide Lotus Domino mailboxes in 2011. While adoption of LotusLive has been slow since it was first announced in 2009, LotusLive is expected to gradually grow over the next four years to 9% of worldwide Lotus Domino mailboxes, by year-end 2015.
- IBM Lotus Domino continues to have a strong installed base in Asia Pacific and Europe, where many Government and Large Enterprises have traditionally favored IBM technology over Microsoft.
- IBM Lotus Domino also provides a strong application development environment, which many large organizations have relied upon to build specialized applications and workflows that are essential to their everyday business operations.
- Figure 1, shows the worldwide installed base of IBM Notes/Domino categorized by mailbox type, in 2011 and 2015.

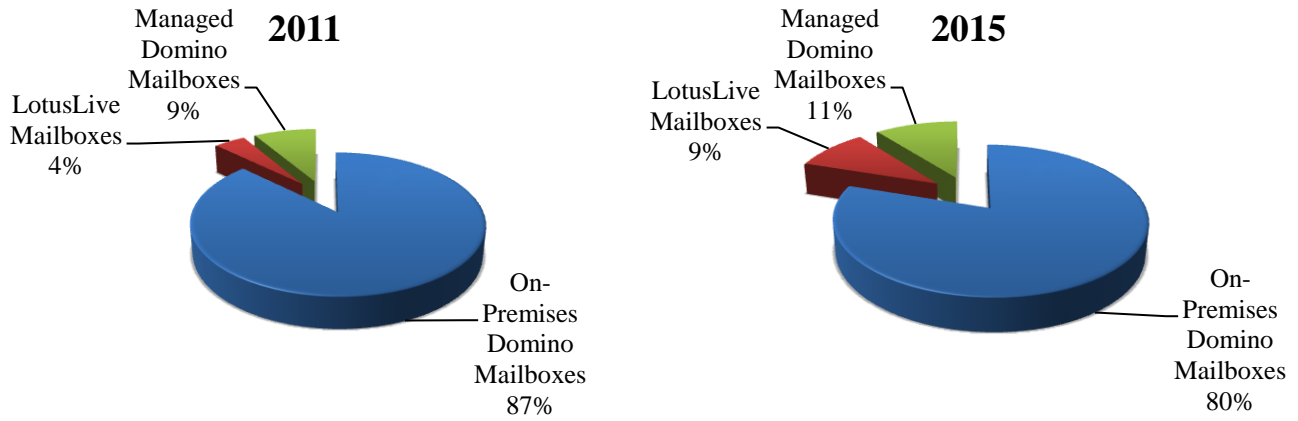


Figure 1: Worldwide IBM Lotus Domino Installed Base by Mailbox Type, 2011 vs. 2015

To view the complete Table of Contents for this report, visit our website at www.radicati.com.