

THE RADICATI GROUP, INC.
A TECHNOLOGY MARKET RESEARCH FIRM

Messaging Platforms Market, 2012-2016

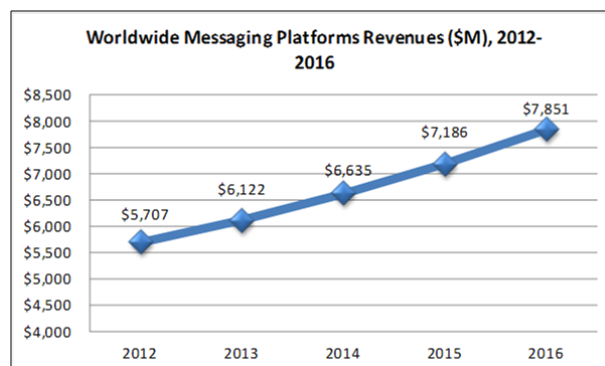
<http://www.radicati.com>

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

Messaging platforms provide email connectivity, as well as a growing range of additional functionality, such as: calendar scheduling, collaboration, security, real-time communication, mobility, as well as in some cases voice and video features. This study looks at two segments:

- ⊗ *Enterprise Messaging Platforms* – which are used on-premises by SMBs and Enterprises of all sizes. The study includes:
 - Market Size, Installed Base and Revenue Market Share by Vendor, Four-Year Forecasts, and Breakouts by Region and Business Size.
 - Breakouts by Version for IBM Lotus Notes/Domino and Microsoft Exchange Server.
- ⊗ *Messaging Platforms for Service Providers* – which are used by consumer and business oriented Service Providers to deliver cloud email to their subscribers. The study includes:
 - Market Size, Installed Base and Revenue Market Share by Vendor, Four-Year Forecasts, and Breakouts by Region and Platform Type.
- ⊗ In-depth analysis of key market players: *Alt-N Technologies, Atilmail, CommuniGate Systems, Critical Path (CP), IBM, IceWarp, Ipswitch, Kerio Technologies, Microsoft, Novell, Openwave Messaging, Open-Xchange, Oracle, Rockliffe Systems, and VMware Zimbra.*

This report is intended for Organizations, Service Providers, Vendors, and Investors who need to make informed decisions about the *Messaging Platforms* market.



Headquarters: 1900 Embarcadero Road, Ste. 206
Palo Alto, CA 94303
phone: (650) 322-8059
fax: (650) 322-8061

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

TABLE OF CONTENTS

SCOPE	5
METHODOLOGY.....	6
EXECUTIVE SUMMARY	7
CHAPTER ONE – MARKET ANALYSIS	9
1.1 MARKET DEFINITION	10
1.2 MARKET SEGMENTATION.....	13
1.3 ENTERPRISE MESSAGING PLATFORMS.....	14
1.3.1 ENTERPRISE MESSAGING PLATFORMS EVALUATION CRITERIA	17
1.3.2 ENTERPRISE MESSAGING PLATFORMS MARKET SHARE BY VENDOR	19
1.3.3 ENTERPRISE MESSAGING PLATFORMS FORECAST	26
1.3.4 ENTERPRISE MESSAGING PLATFORMS INSTALLED BASE BY REGION	28
1.3.5 ENTERPRISE MESSAGING PLATFORMS INSTALLED BASE BY BUSINESS SIZE	30
1.3.6 MICROSOFT EXCHANGE SERVER DEPLOYMENT BY VERSION.....	32
1.3.7 IBM LOTUS DOMINO DEPLOYMENT BY VERSION	34
1.3.8 FEATURE COMPARISON OF ENTERPRISE MESSAGING PLATFORMS	35
1.4 MESSAGING PLATFORMS FOR SERVICE PROVIDERS.....	36
1.4.1 MESSAGING PLATFORMS FOR SERVICE PROVIDERS.....	38
1.4.2 MESSAGING PLATFORMS FOR SERVICE PROVIDERS EVALUATION CRITERIA....	41
1.4.3 MESSAGING PLATFORMS FOR SERVICE PROVIDERS MARKET SHARE	43
1.4.4 MESSAGING PLATFORMS FOR SERVICE PROVIDERS FORECAST	49
1.4.5 MESSAGING PLATFORMS FOR SERVICE PROVIDERS INSTALLED BASE BY REGION	51
1.4.6 MESSAGING PLATFORMS FOR SERVICE PROVIDERS REVENUE BY REGION.....	53
1.4.7 MESSAGING PLATFORMS FOR SERVICE PROVIDERS BY PLATFORM TYPE	55
1.4.8 FEATURE COMPARISON OF COMMERCIAL MESSAGING PLATFORMS FOR SERVICE PROVIDERS	57
CHAPTER TWO – MESSAGING PLATFORM VENDORS	58
ALT-N TECHNOLOGIES	59
ATMAIL.....	64
COMMUNIGATE SYSTEMS.....	69
CRITICAL PATH.....	74
IBM.....	79
ICEWARP	85
IPSWITCH	90
KERIO TECHNOLOGIES, INC.	95
MICROSOFT.....	100
NOVELL	108
OPENWAVE MESSAGING INC.....	113
OPEN-XCHANGE	118
ORACLE	124
ROCKLIFFE SYSTEMS	130
VMWARE ZIMBRA	134

LIST OF FIGURES

FIGURE 1: WORLDWIDE MESSAGING PLATFORMS REVENUE FORECAST (\$M), 2012-2016	8
FIGURE 2: ENTERPRISE MESSAGING PLATFORMS – IB MARKET SHARE, 2012.....	24
FIGURE 3: ENTERPRISE MESSAGING PLATFORMS – REVENUE MARKET SHARE, 2012	25
FIGURE 4: ENTERPRISE MESSAGING PLATFORMS – REVENUE FORECAST, 2012-2016.....	27
FIGURE 5: ENTERPRISE MESSAGING PLATFORMS – IB BY REGION, 2012 & 2016	29
FIGURE 6: ENTERPRISE MESSAGING PLATFORMS – IB BY BUSINESS SIZE, 2012 & 2016.....	31
FIGURE 7: MICROSOFT EXCHANGE SERVER IB BY VERSION, 2012 & 2016.....	33
FIGURE 8: MESSAGING PLATFORMS FOR SERVICE PROVIDERS – IB MARKET SHARE, 2012	47
FIGURE 9: MESSAGING PLATFORMS FOR SERVICE PROVIDERS – REVENUE MARKET SHARE, 2012	48
FIGURE 10: MESSAGING PLATFORMS FOR SERVICE PROVIDERS – REVENUE FORECAST (\$M), 2012-2016.....	50
FIGURE 11: MESSAGING PLATFORMS FOR SERVICE PROVIDERS – IB BREAKOUT BY REGION 2012 & 2016.....	52
FIGURE 12: MESSAGING PLATFORMS FOR SERVICE PROVIDERS – REVENUE BREAKOUT BY REGION, 2012 & 2016.....	54

LIST OF TABLES

TABLE 1: ENTERPRISE MESSAGING PLATFORMS – MARKET SHARE BY VENDOR, 2012	23
TABLE 2: ENTERPRISE MESSAGING PLATFORMS – IB & REVENUE FORECAST, 2012-2016	26
TABLE 3: ENTERPRISE MESSAGING PLATFORMS – IB BY REGION, 2012-2016.....	29
TABLE 4: ENTERPRISE MESSAGING PLATFORMS – IB BY BUSINESS SIZE, 2012-2016.....	31
TABLE 5: MICROSOFT EXCHANGE SERVER IB BY VERSION, 2012-2016	33
TABLE 6: IBM LOTUS NOTES/DOMINO IB BY VERSION, 2012-2016	34
TABLE 7: ENTERPRISE MESSAGING PLATFORMS - FEATURE COMPARISON, 2012.....	35
TABLE 8: MESSAGING PLATFORMS FOR SERVICE PROVIDERS BY TYPE	37
TABLE 9: MESSAGING PLATFORMS FOR SERVICE PROVIDERS – IB & REVENUE MARKET SHARE, 2012	46
TABLE 10: MESSAGING PLATFORMS FOR SERVICE PROVIDERS – IB & REVENUE FORECAST, 2012- 2016.....	49
TABLE 11: MESSAGING PLATFORMS FOR SERVICE PROVIDERS – IB BREAKOUT BY REGION, 2012- 2016.....	52
TABLE 12: MESSAGING PLATFORMS FOR SERVICE PROVIDERS – REVENUE BREAKOUT BY REGION (\$M), 2012-2016.....	54
TABLE 13: MESSAGING PLATFORMS FOR SERVICE PROVIDERS – IB BREAKOUT BY PLATFORM TYPE, 2012-2016	56
TABLE 14: COMMERCIAL MESSAGING PLATFORMS FOR SERVICE PROVIDERS – FEATURE COMPARISON, 2012	57

About The Radicati Group, Inc.

The Radicati Group is a leading technology research and advisory firm focused on all aspects of email, security, email archiving, regulatory compliance, wireless technologies, web services, instant messaging, unified communications, social networking, and more. The company provides both quantitative and qualitative information, including detailed market size, installed base and forecast information on a worldwide basis, as well as detailed country breakouts.

The Radicati Group works with corporate organizations to assist in the selection of the right products and technologies to support their business needs, as well as with vendors to define the best strategic direction for their products. We also work with investment firms on a worldwide basis to help identify new investment opportunities.

The Radicati Group, Inc. is headquartered in Palo Alto, CA, with offices in London, UK.

ORDER FORM *To order, please fill out the following form and return it to The Radicati Group at the address or fax shown on the front.*

Messaging Platforms Market, 2012-2016	
Name:	Company:
<input type="checkbox"/> P.O. \$3,000 <i>Note: We will need the actual P.O. paperwork from your Purchasing Department before we can fill the orders.</i>	
<input type="checkbox"/> Credit Card \$2,500 <input type="checkbox"/> VISA <input type="checkbox"/> MasterCard <input type="checkbox"/> Amex	
Card Number:	Exp. Date:
Signature:	
Address:	
<i>City, State, Zip:</i>	
<i>Country:</i>	
<i>Please indicate street address - NO P.O. BOX please!</i>	
Phone:	Email: