



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

Microsoft SharePoint Market Analysis, 2013-2017

Editor: Sara Radicati, PhD; Principal Analyst: Todd Yamasaki

SCOPE

This study examines the market for Microsoft SharePoint in both the On-Premises and Cloud-based Collaboration Markets. The study provides extensive 2013 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, strengths and weaknesses of Microsoft SharePoint Foundation and Microsoft SharePoint Server 2013 on-premises and offered through cloud-based services, as well as Microsoft SharePoint Online.

The revenue projections 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)20 7794 4298 • FAX. +44 (0)20 7431 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 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

- The consumer technology market has continued to have a large impact on enterprises over the last few years. Business users want tools and solutions for social collaboration, mobility, web content management, and eDiscovery. Microsoft is clearly focusing on these key areas with their latest release of SharePoint Server 2013 and offers the following improvements:
 - *Social Collaboration* – Social capabilities are now much more in line with features and concepts made popular by consumer social media services, such Facebook and Twitter. The way information and content within SharePoint is now shared is much more similar to these consumer social media services.
 - *Mobility* – Users are provided with an optimized mobile browsing experience through multiple mobile interfaces, allowing the user to choose the UI that is most effective for them. Enhanced push notifications and location-based features further round out SharePoint’s new mobile capabilities.
 - *Web Content Management (WCM)* – Microsoft has introduced a new set of features to provide SharePoint site content authors with more control over the building of Internet, intranet, and extranet SharePoint sites.
 - *eDiscovery* –Microsoft has completely reengineered SharePoint’s eDiscovery capabilities and now provides a much more robust solution out-of-the-box.

SharePoint 2013 includes the ability to do in-place holds on SharePoint 2013 and Microsoft Exchange Server 2013 content and new eDiscovery site templates.

- Microsoft offers SharePoint Foundation and SharePoint Server as on-premises solutions, as well as cloud-based solutions through service provider partners. Microsoft also offers its own cloud-based service, Microsoft SharePoint Online as a part of its Microsoft Office 365 productivity suite.
 - Microsoft SharePoint Online is the cloud-based, scaled-down version of Microsoft SharePoint Server 2010. Microsoft started migrating customers to the 2013 version of SharePoint Online in the first quarter of 2013 and will continue migrating customers throughout the year. SharePoint Online is available as a part of Microsoft's cloud business productivity suite, Microsoft Office 365, which also includes: Office Professional Plus, Exchange Online, Lync Online, and Office Web Apps. Microsoft Office 365 replaced Microsoft's previous cloud productivity service, Microsoft Business Productivity Online Suite (BPOS) in 2011.
- The market for third-party developers building solutions for SharePoint has been very strong in recent years. Many third-party developers still believe there is much to be desired regarding the mobile and social capabilities of SharePoint. These developers are aggressively marketing their solutions as necessary add-ons as they believe the functionality that they offer is unmatched by SharePoint. Microsoft has improved many areas within SharePoint 2013, however, there still a lot of opportunity for these developers to succeed here.

- Figure 1, shows the SharePoint Server (for all versions of SharePoint Server combined) worldwide breakout of on-premises SharePoint Server deployments and Microsoft Office 365 and partner cloud-based SharePoint Server deployments in 2013.

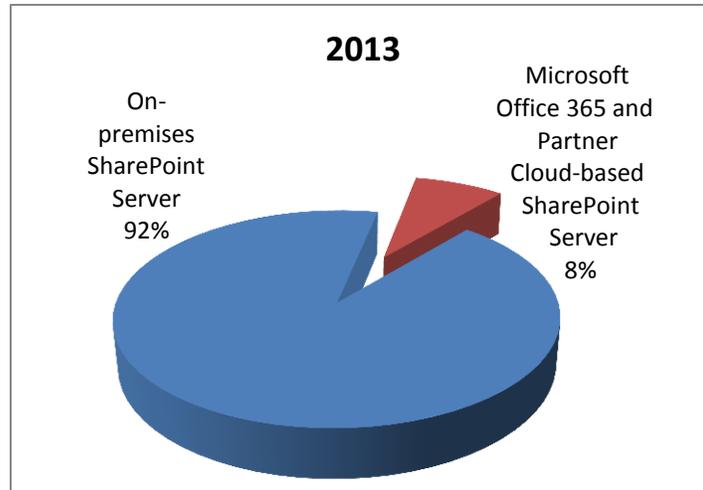


Figure 1: Worldwide On-Premises Microsoft SharePoint Foundation IB by Business Size, 2012 vs. 2016

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