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A TECHNOLOGY MARKET RESEARCH FIRM

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Messaging Platforms Market, 2013-2017

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SCOPE

This study provides an analysis of the Messaging Platforms market in 2013, and its potential growth over the next four years. It provides market size, installed base and revenue market share by vendor, as well as forecasted market growth in terms of installed base and revenues, from 2013 to 2017. 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 are based on primary research conducted by The Radicati Group, Inc. Our proprietary methodology combines information derived from three principal sources:

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- a. Our Worldwide Database which tracks user population, seat count, enterprise adoption and IT use from 1993 onwards.
- b. Surveys conducted on an on-going basis in all market areas which we cover.
- c. Market share, revenue, sales and customer demand information derived from vendor briefings.

Forecasts are based on historical information as well as our in-depth knowledge of market conditions and how we believe markets will evolve over time.

Finally, secondary research sources have also been used, where appropriate, to cross-check all the information we collect. These include company annual reports and other financial disclosures, industry trade association material, published government statistics and other published sources.

Our research processes and methodologies are proprietary and confidential.

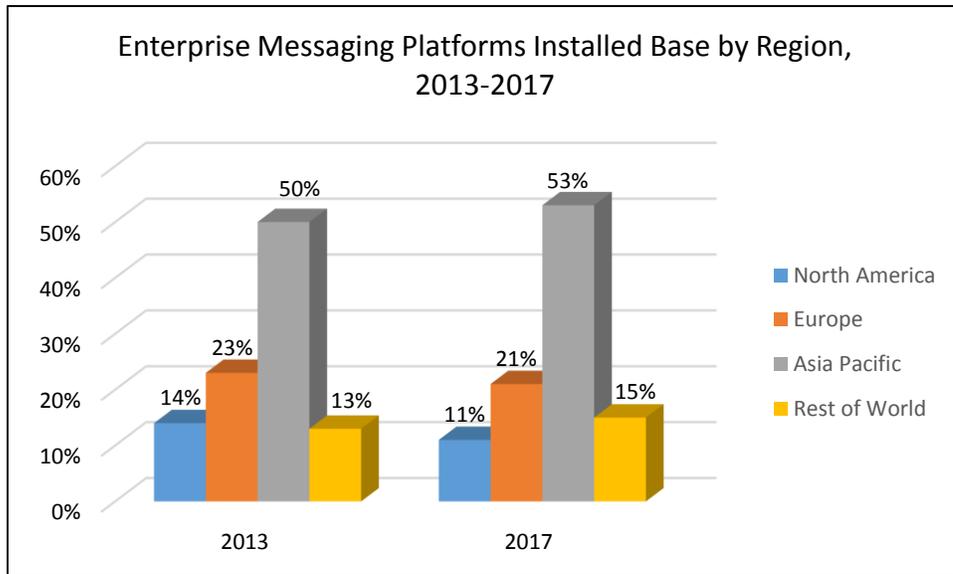
EXECUTIVE SUMMARY

- Messaging platforms provide email functionality, as well as collaboration tools, contact management, calendar/scheduling, security, real-time communications, mobile access, unified communications (UC), and more.
- The Messaging Platforms market is defined by two segments, as follows:
 - **Enterprise Messaging Platforms** – These are on-premises email and collaboration platforms that cater to the needs organizations of all sizes. Key solutions in this segment include: *IBM Domino, Microsoft Exchange Server*, and others.
 - **Messaging Platforms for Service Providers** – These are highly scalable and reliable messaging platforms designed to meet the needs of a demanding service provider environments, which can range from hundreds of thousands to millions of subscriber seats. Key solutions in this

segment include: *Critical Path (CP) Portfolio, Microsoft Exchange Server, Openwave Messaging Universal Messaging Suite, Oracle Communications Unified Communications Suite*, and others.

- Microsoft Exchange Server continues to be the leading platform in the Enterprise Messaging Platforms space, with a 60% market share by year-end 2013. The latest version, Microsoft Exchange Server 2013, was released in late 2012 with a slew of new functionality.
- Growth in the Enterprise Messaging Platforms market, however, is slowing due to the growing popularity of cloud-based business email services. Initially, cloud-based business email services were appealing to smaller organizations with limited resources and fewer concerns with the safety of data in the cloud. Though safety of sensitive data remains a concern among larger enterprise organizations, the cloud is increasingly being embraced by organizations of all sizes.
- Messaging Platforms for Service Providers have evolved into fully-featured unified communications and social platforms. Vendors in this segment must continually meet the ever-growing demand for more advanced capabilities. Messaging Platforms have become a centralized communication hub for users, allowing them to access a wide range of services, including instant messaging (IM), social networking, unified communications, and more.
- Messaging Platforms for Service Providers vendors offer service providers highly customizable packages, allowing them to pick and choose which components to deploy in order to best fit their target market needs. They are also opening up additional monetization opportunities for service providers through open APIs, which allow providers to create their own value-added services, as well include advertisement space on their interface.
- Figure 1, shows the installed base distribution for the Enterprise Messaging Platforms segment by region, in 2013 and 2017. Over the next four years, the Enterprise Messaging Platforms market is expected to shrink in North America and Europe, primarily due to increased adoption of cloud-based email services. Asia Pacific and Rest of World (RoW), on the other hand, are expected to

continue utilizing on-premises messaging solutions, as less developed parts of these regions gain access to email for the first time.



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