THE RADICATI GROUP, INC.
A TECHNOLOGY MARKET RESEARCH FIRM
WWW.RADICATI.COM
TEL. 650 322-8059

Microsoft SharePoint Market Analysis, 2019-2023

SCOPE

This study examines the market for Microsoft SharePoint in the On-Premises and Cloud Collaboration Markets. The study provides extensive 2019 data regarding installed base, broken out by business size, region, version, and other variables, along with four-year forecasts. The report also examines the key features and direction of SharePoint Server and SharePoint Online.

All of the numbers in this study represent *worldwide* figures, unless otherwise indicated. Any financial data is expressed in $USD.

Regional breakouts are provided for: North America, Europe, Asia Pacific, and Rest of World. This report does not contain country breakouts, but these may obtained from The Radicati Group at an extra charge.

The revenue projections in the following sections do not include revenues from systems integration or professional services.

METHODOLOGY

The information and analysis in this report is based on primary research conducted by The Radicati Group, Inc. Our proprietary methodology combines information derived from three principal sources:

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.
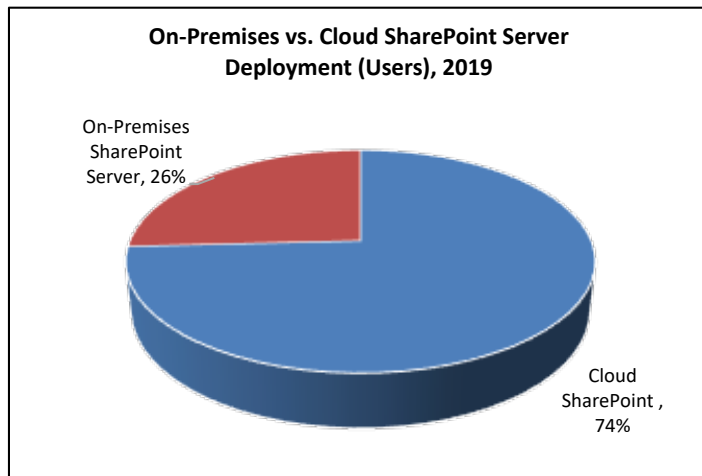
Our research processes and methodologies are proprietary and confidential.

EXECUTIVE SUMMARY

- Microsoft SharePoint's breadth of functionality makes it one of the most unique enterprise solutions available to businesses today. Microsoft SharePoint has no direct competitors, however, it competes against a variety of different vendors and solutions in many different markets, including: Enterprise Content Management (ECM), Social Networking, Web Content Management (WCM), Business Intelligence (BI), Enterprise Search, and more.

- Microsoft SharePoint is available in different form factors:

  o **SharePoint Server** – is an on-premises solution, which is increasingly being deployed in hybrid environments with features and functionality that cut across SharePoint Online, and all of Office 365 functionality.

  o **SharePoint Online** – is the cloud-based version of SharePoint, which is offered as part of Office 365, as a standalone solution, or through Microsoft Hosting Partners. Microsoft is encouraging customers to move to Office 365 and

SharePoint Online, and is rolling out new features on a continuous basis to its cloud environment.

- SharePoint continues to see strong worldwide adoption with organizations of all sizes across all verticals. New features include better integration with OneDrive, Teams, and Yammer, as well as sophisticated features for eDiscovery, Enterprise Search and workflow creation, just to name a few.

- On-Premises deployments of SharePoint are rapidly declining as Microsoft pushes more customers to SharePoint Online, as part of Office 365. Microsoft is rolling out all new functionality first in SharePoint Online and then in on-premises versions, such as SharePoint Server 2019.

- Figure 1, shows the worldwide breakout of On-Premises and Cloud SharePoint Server deployments in 2019. Cloud-based SharePoint deployments, offered by Microsoft or through Microsoft partners, currently represent 74% of all SharePoint deployments. *(Note: On-Premises refers to all versions of SharePoint Server and legacy on-premises solutions, Cloud SharePoint refers to SharePoint Online as well as hosted SharePoint offered by Microsoft Hosting Partners.)*

On-Premises vs. Cloud SharePoint Server Deployment (Users), 2019

On-Premises SharePoint Server, 26%

Cloud SharePoint , 74%

Figure 1: On-premises vs. Cloud SharePoint Server, 2019

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