Microsoft SharePoint Market Analysis, 2020-2024

SCOPE

This study examines the market for Microsoft SharePoint in the On-Premises and Cloud Collaboration Markets. The study provides extensive 2020 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 is a unique solution which offers functionality that straddles a number of different markets, including:

  - o Enterprise Content Management (ECM)
  - o Enterprise Social Networking
  - o Web Content Management (WCM)
  - o Business Intelligence (BI)
  - o Enterprise Search

- Microsoft is focusing new SharePoint functionality to address the following key enterprise needs:

  - o *Social Collaboration* – SharePoint Server's social capabilities are more in line with features made popular by consumer social media services, such as Facebook and Twitter. SharePoint also integrates with Yammer to provide full enterprise social networking across people and content.

- o *Mobility* – SharePoint provides enhanced mobile browsing capabilities through multiple mobile interfaces, allowing users to choose the UI that is most effective for them. Enhanced push notifications and location-based features further round out SharePoint's mobile capabilities.

- o *Web Content Management (WCM)* – SharePoint provides site content authors with control over the building of Internet, intranet, and extranet SharePoint sites. The usability of SharePoint's WCM solution includes capabilities such as: copying content from Word to SharePoint's Rich Text Editor, easier video content manipulation, improved image rendition support and more.

- o *eDiscovery* – SharePoint includes a powerful eDiscovery solution out-of-the-box. It includes the ability to do in-place holds on content and new eDiscovery site templates. An export tool allows results from eDiscovery search queries to be sent out for review. Microsoft has also included eDiscovery APIs that enable businesses to build customized solutions that leverage SharePoint's eDiscovery functionality.

- Figure 1, shows the worldwide breakout of On-Premises and Cloud SharePoint Server deployments in 2020. Cloud-based SharePoint deployments, offered by Microsoft or through Microsoft partners, currently represent 81% 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.)*
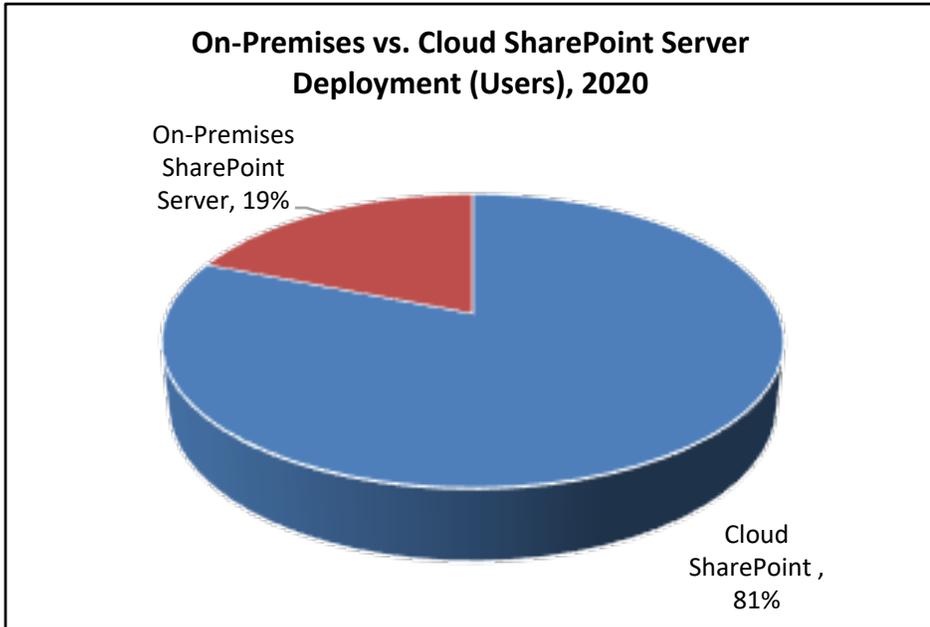
On-Premises vs. Cloud SharePoint Server Deployment (Users), 2020

On-Premises SharePoint Server, 19%

Cloud SharePoint , 81%

Figure 1: On-premises vs. Cloud SharePoint Server, 2020

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