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Microsoft SharePoint Market Analysis, 2016-2020

SCOPE

This study examines the market for Microsoft SharePoint in the On-Premises and Cloud Collaboration Markets. The study provides extensive 2016 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 be 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:

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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

- Microsoft SharePoint is designed to address the following key areas of functionality:
 - *Social Collaboration* – SharePoint’s social capabilities are in line with features made popular by consumer social media services, such Facebook and Twitter. SharePoint also integrates with Yammer to provide full enterprise social networking across people and content.
 - *Mobility* – SharePoint supports enhanced mobile browsing capabilities through multiple mobile interfaces. Enhanced push notifications and location-based features further round out SharePoint’s mobile capabilities.
 - *Web Content Management (WCM)* – SharePoint provides site management controls to build Internet, intranet, and extranet SharePoint sites.

- *eDiscovery* – SharePoint includes eDiscovery capabilities out-of-the-box for In-Place and content management.
- Microsoft SharePoint key products and technologies include:
 - **SharePoint Foundation**: was Microsoft’s free, entry-level collaboration and content management platform. SharePoint Foundation 2013 was included as an underlying component of Microsoft SharePoint Server 2013. Microsoft, however, does not plan to release any further updates to Foundation beyond the 2013 version.
 - **SharePoint Server**: is an on-premises enterprise content management and collaboration platform. SharePoint Server delivers advanced features and capabilities for content management, business intelligence, social functionality, and integration with a broad range of other Microsoft services and applications. SharePoint Server is increasingly being designed to be deployed in hybrid environments with features and functionality that cut across SharePoint Online, and all of Office 365 functionality.
 - **SharePoint Online** – refers to cloud SharePoint Server services offered by as part of Office 365, or through Microsoft Hosting Partners. Microsoft encourages customers to move to Office 365 and SharePoint Online, and rolls out new features on a continuous basis to its cloud environment.
- Figure 1, shows the worldwide breakout of On-Premises and Cloud SharePoint Server deployments in 2016. (*Note: On-Premises refers to all versions of SharePoint Server and previous on-premises solutions, Cloud SharePoint refers to SharePoint Online as well as hosted SharePoint offered by Microsoft Hosting Partners.*)

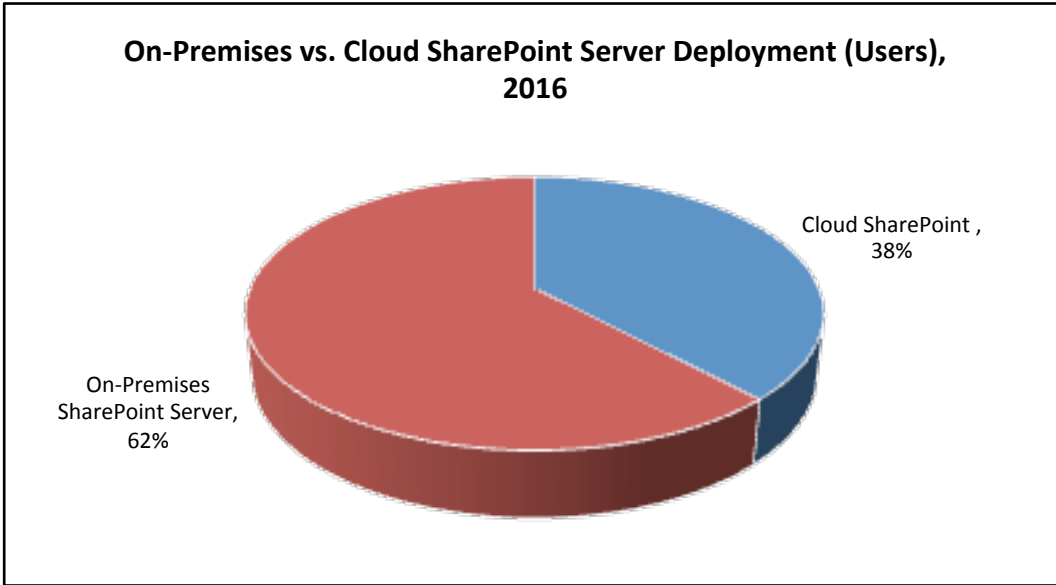


Figure 1: On-premises vs. Cloud SharePoint Server, 2016

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