



Enterprise Messaging Market Trends, 2005-2008

Report Focus

Messaging is the group of infrastructure elements that provide email, instant messaging (IM), calendaring, voice-over-IP (VoIP) and other communication services for an organization. As such, messaging has become the conceptual equivalent of plumbing or electrical wiring for most organizations – it is a necessary part of the business fabric that virtually no organization of any size can operate without effectively.

The primary data sources for this report were two surveys of North American organizations that Osterman Research conducted specifically for this report during September and October 2005. The surveys fielded a total of 87 questions and were completed with 141 respondents for the larger survey and 114 respondents for the smaller survey. Respondents to the surveys were decision makers and/or influencers for their organizations' messaging system(s).

Key Findings Presented in this Report

- Forty percent of organizations have centralized/consolidated their messaging servers into a single data center, while another 37% are working toward consolidation.
- Increasing backup and restore times, growth in messaging storage and increasing message size – all storage-related issues – are the three leading messaging-related problems discovered in the research for this report.
- Only one-third of organizations believe that they are well equipped or very well equipped to address the variety of regulatory, legal and HR-related issues surrounding email.
- One-half of organizations are either concerned or extremely concerned about the leakage of sensitive information via approved and supported applications and communications channels, such as email.
- About one in three organizations view data mining from the corporate messaging system as either important or extremely important. By contrast, the ability to restore data back into email systems from backup tapes and other sources for legal discovery purposes is viewed as important or extremely important by most nearly two-thirds of organizations.
- Only one out of eight organizations is very confident that their estimate of the true cost of providing services messaging services for their organization is correct, while another 45% are only somewhat confident and the remaining 43% are not confident.



- Among the many initiatives that organizations will undertake during the next year, eradicating threats like spam, viruses and spyware top the list of the most important initiatives. More than one-half of organizations view new efforts to eradicate these threats as important or extremely important, followed by initiatives focused on email policy compliance, platform upgrades and migration and capacity planning.
- While only three percent of organizations have actually migrated to Linux-based messaging servers, one in seven organizations is willing to consider doing so now, about one-quarter are willing to consider doing so by late 2006 and nearly two in five organizations might consider it by the end of 2007.
- When asked about the likelihood of using an 'alternative' messaging system, a number of vendors were mentioned as potential replacements for their current vendors' offerings.
- One in five organizations has not deployed any sort of disaster recovery capability for their email system. Even among those that have done so, there is substantial improvement needed in many cases from a business continuity perspective.

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For more information on Osterman Research,
or if you have any questions about this
report, please contact us at:

Osterman Research, Inc.

P.O. Box 1058

Black Diamond, WA 98010-1058

Tel: +1 253 630 5839

Fax: +1 866 842 3274

Email: info@ostermanresearch.com

<http://www.ostermanresearch.com>



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