



## Enterprise Messaging Server Market Trends, 2008-2011

### Report Focus

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This report presents the results of a detailed research program into preferences and plans for messaging servers among mid-sized (100 to 1,000 email users) and large (>1,000 email users) organizations in the North American market. It focuses on the market for messaging servers, the cost of managing these systems, problems that organizations have in managing their messaging infrastructure, the potential use of alternative messaging systems, and other key issues. The goal of this research is to provide vendors, investors and others interested in the messaging market with actionable information that they can use to develop marketing plans and to more accurately focus their efforts on understanding and penetrating the messaging market.

### Key Findings and Trends Discussed in this Report

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- **Prospects Look Bright For Unified Communications**  
The strongest growth in the messaging market is likely to occur in productivity enhancing voice applications, namely Unified Communications and Unified Messaging. More than a third of organizations expect to deploy Unified Communications, the most of any technology, and just about another third expect to deploy Unified Messaging capabilities.
- **Large Organizations Prefer Notes**  
While the vast majority of the Notes organizations surveyed were over 2,500 users, the same could only be said for 34% of Exchange organizations. As has been the case in past surveys, Notes tends to dominate the upper end of the market, GroupWise finds strength at the lower end (with a number of exceptions), and Exchange tends to be used by organizations large and small.
- **GroupWise Isn't Done For Just Yet**  
GroupWise has long been known for its ease of use and requirement for minimal administration, which translates into the bottom line. Overall, GroupWise is less expensive to maintain than many of the systems with which it competes. We expect this to a strong selling point for GroupWise during 2009 and 2010 as decision makers seek to cut costs wherever possible.
- **The Vulnerable Messaging Network**  
There was a greater amount of downtime spent and more time to resolve those failures discovered in the current survey compared to last year's survey. Last year, we found there was an average of 34 minutes of downtime per month; this year that number jumped to 53 minutes. Similarly, last year there were, on average, 7.5 person-hours spent to resolve a typical single downtime incident, whereas this year the number rose to 13.5 person-hours per incident.



- **Smaller Organizations Prefer Appliances**  
We found that about two in five organizations with under 2,500 users would deploy an appliance-based messaging system given the opportunity versus a much smaller proportion of organization with more than 2,500 users.
  
- **Watch Out For Hosted Messaging**  
The number of respondents who indicated that hosted messaging platform was desirable or very desirable, if it could be implemented from scratch, nearly doubled since last year's survey. This is a trend that is gaining momentum, driven largely by a soft economy and decision makers' need to cut messaging-related and other costs wherever possible.
  
- **Linux's Mixed Reviews**  
The number of respondents preferring Linux as the basis for their messaging systems fell by seven percentage points to 16%. The number of organizations that would choose Linux given a clean slate also fell from 30% last year to 23% this year. At the same time, the number of Linux-based messaging servers has doubled since last year.

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## About Osterman Research, Inc.

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Osterman Research, Inc. provides market research, cost modeling, benchmarking and related services to vendors of messaging and collaboration products and services.

We help vendors, IT departments and other organizations make better decisions through the acquisition and application of relevant, accurate and timely data on markets, market trends, products and technologies. We also help vendors of technology-oriented products and services to understand the needs of their current and prospective customers.

Part of what makes us unique is our market research panel: a large and growing group of IT professionals and end-users around the world with whom we conduct our research surveys. This allows us to conduct surveys quickly and accurately.

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