



Messaging Virtualization Market Trends, 2008-2011

Report Focus

This report focuses on the North American market for virtualization among organizations in the mid-sized (100-1,000 email users) and enterprise markets (>1,000 email users). Osterman Research conducted a survey specifically for this report in order to understand current and future trends in the use of virtualization for various messaging-related applications. Early subscribers to this study were provided the opportunity to submit questions that were fielded in the surveys conducted for this report. As a result, the research focus of this report was shaped to some extent by these organizations that represent a wide range of vendors in the messaging market.

Key Findings and Trends Discussed in this Report

- **The impact on server hardware could be significant**
At its core, virtualization is about making hardware significantly more efficient, whether virtualization is deployed on servers, client machines, storage, etc. That means that significant growth in virtualization over the next few years – one of the key findings of this study – could result in a significant negative impact on server and other hardware shipments over the long term.

- **Reasons for deploying messaging virtualization focus on costs, business continuity**
The two leading reasons that organizations cite for deploying virtualization technology are to reduce hardware costs and to improve disaster recovery/business continuity. Other important reasons to deploy virtualization, cited by roughly three in five organizations as a driver or major driver, are optimizing the IT infrastructure, to make it easier to add additional capacity to existing services and to reduce the cost of IT labor.

- **IT understanding about virtualization needs improvement**
IT decision-makers' knowledge about virtualization has a long way to go: 34% of these decision makers have, at best, only a modest understanding of how virtualization could be used for email server applications, while 37% have this level of knowledge about how virtualization could be used for storage systems. Similarly, nearly two-thirds of IT decision-makers are no more than modestly aware of the existence of commercial or open-source virtual appliances for messaging functions.

- **The penetration of virtualization will increase rapidly**
Today, under 10% of email servers are running as virtual servers, but decision-makers anticipate rapid growth in the use of virtualization for email servers during the next two years. Similar growth rates will occur for security and mobility servers.



- **Windows is the preferred email-related OS**
Windows is clearly the preferred operating system for use in email applications, as shown in the following figure: 72% of decision makers will prefer Windows Server as the backbone of their email infrastructure for the next six months, while nearly as many will prefer Windows Server for their email infrastructure projects well into 2009. Even if the entire email infrastructure in organizations could be scrapped, most of which is built on Windows Server, most organizations would still prefer to go with Windows Server as the backbone of their email infrastructure.

- **Vendor familiarity needs improvement**
Most decision makers or influencers in IT departments are not familiar with most vendors of virtualization technologies. For example, the vast majority of IT decision makers are familiar with only with leading vendors like VMware, Citrix, IBM, Microsoft and a few others.

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About Osterman Research, Inc.

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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