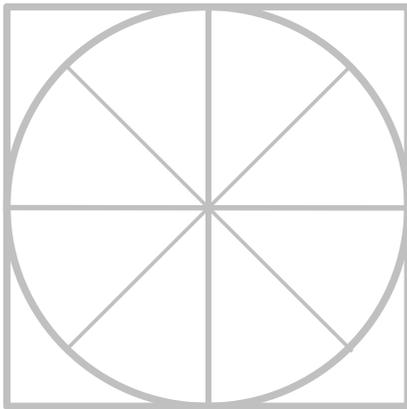




The Radicati Group, Inc.
1900 Embarcadero Road, Ste. 206
Palo Alto, CA 94303
Phone: (650) 322-8059
Fax: (650) 322-8061
www.radicati.com

THE RADICATI GROUP, INC.

Messaging Platforms for Service Providers - Market Quadrant 2012



*An Analysis of the Market for
Messaging Platforms for Service
Providers,
Revealing Top Players, Mature Players,
Specialists and Trail Blazers.*

November 2012

* Radicati Market QuadrantSM is copyrighted November 2012 by The Radicati Group, Inc. Reproduction in whole or in part is prohibited without expressed written permission of the Radicati Group. Vendors and products depicted in Radicati Market QuadrantsSM should not be considered an endorsement, but rather a measure of The Radicati Group's opinion, based on product reviews, primary research studies, vendor interviews, historical data, and other metrics. The Radicati Group intends its Market Quadrants to be one of many information sources that readers use to form opinions and make decisions. Radicati Market QuadrantsSM are time sensitive, designed to depict the landscape of a particular market at a given point in time. The Radicati Group disclaims all warranties as to the accuracy or completeness of such information. The Radicati Group shall have no liability for errors, omissions, or inadequacies in the information contained herein or for interpretations thereof.

TABLE OF CONTENTS

RADICATI MARKET QUADRANTS EXPLAINED	3
MARKET SEGMENTATION	5
EVALUATION CRITERIA	7
MARKET QUADRANT – MESSAGING PLATFORMS FOR SERVICE PROVIDERS VENDORS ..	10
KEY MARKET QUADRANT TRENDS.....	11
MESSAGING PLATFORMS FOR SERVICE PROVIDERS - VENDOR ANALYSIS	14
TOP PLAYERS.....	14
TRAIL BLAZERS	20
SPECIALISTS.....	24
MATURE PLAYERS	34

=====

Please note that this report comes with a 1-5 user license. If you wish to distribute the report to more than 5 individuals, you will need to purchase an internal site license for an additional fee. Please contact us at admin@radicati.com if you wish to purchase a site license.

Companies are never permitted to post reports on their external web sites or distribute by other means outside of their organization without explicit written prior consent from The Radicati Group, Inc. If you post this report on your external website or release it to anyone outside of your company without permission, you and your company will be liable for damages. Please contact us with any questions about our policies.

=====

RADICATI MARKET QUADRANTS EXPLAINED

Radicati Market Quadrants are designed to illustrate how individual vendors fit within specific technology markets at any given point in time. All Radicati Market Quadrants are composed of four sections, as shown in the example quadrant (Figure 1).

1. **Specialists** – This group is made up of two types of companies:
 - a. Emerging players that are still very new to the industry and have not yet built up much of an installed base. These companies are still developing their strategy and technology.
 - b. Established vendors that offer a niche product.
2. **Trail Blazers** – These vendors offer cutting edge technology, but have not yet built up a large customer base. With effective marketing and better awareness, these companies hold the power to dethrone the current market leaders. “Trail blazers” often shape the future of technology with their innovations and new product designs.
3. **Top Players** – These are the current leaders of the market, with products that have built up large customer bases. Vendors do not become “top players” overnight. Most of the companies in this quadrant were first specialists or trail blazers (some were both). As companies reach this stage, they must fight complacency and continue product innovation, or else they will be replaced by the next generation of “trail blazers.”
4. **Mature Players** – These vendors have large, mature installed bases of customers, but no longer set the pace for the rest of the industry. These vendors are no longer considered “movers and shakers” as they once were.
 - a. In some cases, this is by design. If a vendor has made a strategic decision to move in a new direction, it may slow development on one product line and start another.

- b. In other cases, a vendor may simply become complacent as a top vendor and be out-developed by hungrier “trail blazers” and other top players.
- c. Companies in this stage either find new life and revive their R&D, moving back into the “top players” segment, or else they slowly fade away as legacy technology.

Figure 1, below, shows a sample Radicati Market Quadrant. As a vendor continues to develop its product, it will move horizontally along the “x” axis. As market share changes, vendors move vertically along the “y” axis. It is common for vendors to move between quadrants over the life of a product, as their products improve and market requirements evolve.

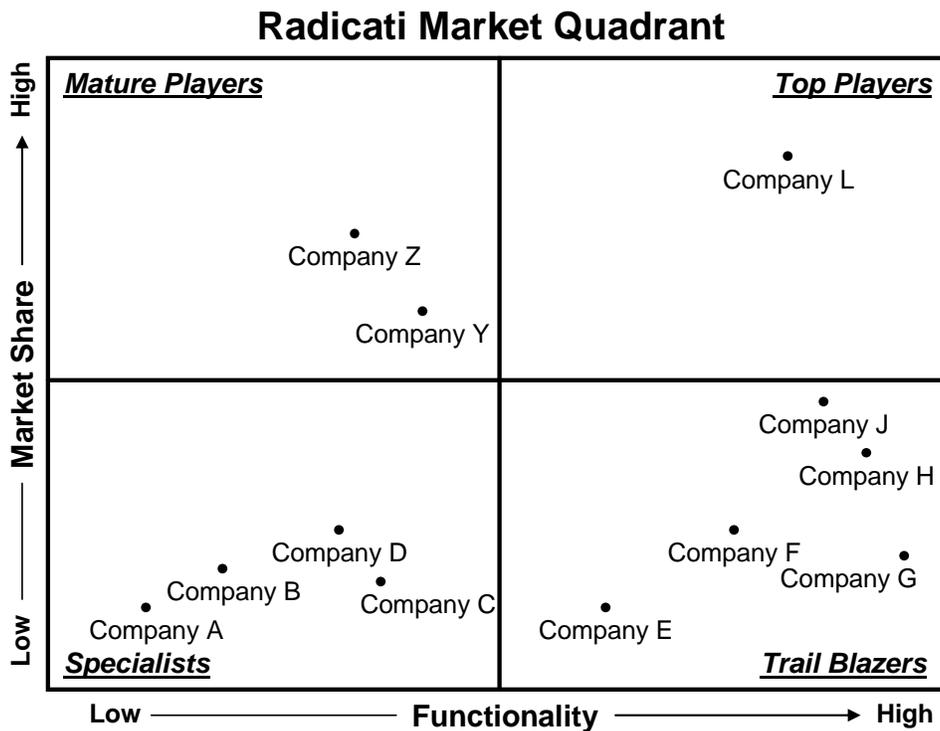


Figure 1: Sample Radicati Market Quadrant

- **Functionality** – is rated from 1 to 10, with 10 being the highest, and 1 – the lowest.
- **Market Share** – is assigned according to the company’s ranking in our latest annual reports, based on its user Installed Base (e.g. the company with the largest installed base market share is number 1, the one with the second largest installed base market share is number 2, etc.).

MARKET SEGMENTATION

This edition of Radicati Market Quadrants covers the **Messaging Platforms for Service Providers** segment of the Messaging Platforms market, which is defined as follows:

- **Messaging Platforms for Service Providers** – are highly scalable messaging platforms that are designed for demanding service provider environments, which can range from hundreds of thousands to millions of subscribers. Service providers deploying messaging platforms include: Internet Service Providers (ISPs), Telecommunication Providers (i.e. Telcos), Web Hosting Providers, Hosted Business Email Providers, and Application Service Providers (ASPs). Vendors in this market include: *Atmail, CommuniGate Systems, Critical Path (CP), IceWarp, Ipswitch, Microsoft, Open-Xchange, Openwave Messaging, Oracle, Rockliffe, VMware Zimbra*, and others.

Many vendors in this space target both on-premises enterprise customers and service providers. However, this report focuses only on the part of their business that deals with supplying messaging platforms to service providers.

One overarching trend in both the consumer and business-oriented service provider market is the ever-growing demand for more features. Service providers must consistently keep up with customers' expectations by providing greater functionality, and platform vendors are now including features such as: a rich user interface, mobile accessibility, social media integration, instant messaging, unified communications, voice, video, and more.

Many messaging vendors also support virtualization of their platforms, which allows service providers to achieve better hardware utilization, more efficient administration, and better economies of scale.

In 2012, the worldwide revenue for the Messaging Platforms for Service Providers segment is nearly \$1.1 billion. This figure is expected to grow to over \$2.8 billion by the end of 2016. Figure 2, shows the revenue forecast of the Messaging Platforms for Service Providers market, from 2012 to 2016.

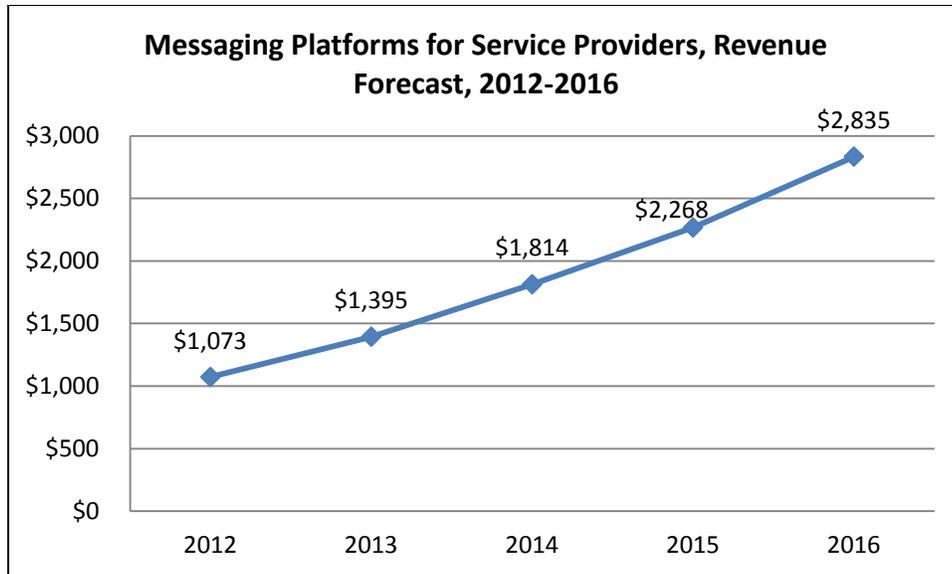


Figure 2: Messaging Platforms for Service Providers – Revenue Forecast (\$M), 2012-2016

Note: Throughout this report, the terms “Email” and “Messaging” are used interchangeably.

EVALUATION CRITERIA

Messaging Platforms for Service Providers vendors are positioned in the quadrant, according to two criteria: Market Share and Functionality.

Market Share – is based on the installed base published in our “Messaging Platforms Market, 2012-2016” report. The provider with the largest installed base has a market share of 1, the one with the second largest installed base has a market share of 2, etc. In order for Messaging Platforms for Service Providers vendors to be positioned in the Top Player or Mature quadrants, they need to have a market share of 1 to 4. Messaging Platforms for Service Providers with smaller installed bases are positioned either in the Trail Blazer or Specialist quadrants.

Functionality – we assess each Messaging Platform for Service Providers solution based on a number of key differentiation criteria.

In order for an Email Platforms for Service Providers vendor to be on the right side of the quadrant (*Top Player* or *Trail Blazer*), their solution should possess the following capabilities:

- **Scalability** – refers to the degree that a Messaging Platform system can accommodate more users. Service providers require a scalable system in order to offer their services to a large number of users. Scalability consists of two components: scaling up and scaling out. Scaling up, otherwise known as vertical scaling, refers to a single node in a Messaging Platform system and its ability to maximize resources and fit a larger number of users on a single server. Scaling out, otherwise known as horizontal scaling, refers to a system’s capacity to integrate additional servers with existing ones. Ideally, service providers deploy a scalable platform in order to lower total cost of ownership (TCO).
- **Reliability** – service providers are expected to offer uninterrupted services to their subscribers. Therefore, the platforms that these service providers utilize must include high availability (HA), as well as disaster recovery (DR) features. These features ensure minimal downtime in the event of a system failure or system update. In addition, Messaging Platforms must also give service providers access

- to resources that allow them to assess the condition of their servers in order to be prepared for any unexpected errors or failures that may occur.
- ***Multi-Tenancy*** – service providers expect their platform to be able to handle thousands to millions of subscribers. Multi-tenancy allows service providers to place and manage multiple customers on a single server. This boosts server efficiency and greatly reduces costs, as service providers can utilize fewer servers while maintaining a large number of subscribers. With a multi-tenant environment, service providers experience less hardware and maintenance overhead, and this reduction in cost allows them to offer low-cost services to customers.
 - ***Mobility*** – with a rapidly increasing number of consumer and business customers with smartphone or tablet devices, service providers have continued to offer mobile access to their customers. Platform vendors typically include mobile clients for Apple iOS, Google Android, Windows Phone, and BlackBerry devices. These clients allow customers to access email, contacts, and calendars on their mobile device. In addition, some vendors are focusing on bringing the mobile experience to popular tablets, most notably Apple’s iPad.
 - ***Social Networking Integration*** – The growth of social networking over the past few years has also influenced service providers to include access to popular social media services, such as Facebook, Twitter, and LinkedIn as part of their package. Some vendors’ platforms have fully integrated these social networking sites into their interface, allowing for access to multiple networks on a single interface. Other platforms allow service providers to utilize open APIs to build custom applications that enable this same type of integration.
 - ***Subscriber Features*** – Today, the messaging platforms market is much more than basic email services. As a result, service providers are including more and more features on top of email in order to make their offerings more appealing for customers, who have grown to expect these types of advanced features. These features include:
 - *Additional Storage*
 - *Email Security (Anti-Virus and Spam Filtering Protection)*

- *Email Archiving and Compliance*
- *Groupware (Shared Calendaring, Shared Contacts, and other Personal Productivity Tools)*
- *Instant Messaging (IM)*
- *Voice and Video Chat*
- *Unified Communications (UC)*

Note: *On occasion, we may put a vendor on the right side of the quadrant by giving them a higher than typical Functionality Score, even if they are missing one or two of the features mentioned above, if we feel that other aspects of their solution are particularly unique and innovative.*

MARKET QUADRANT – MESSAGING PLATFORMS FOR SERVICE PROVIDERS VENDORS

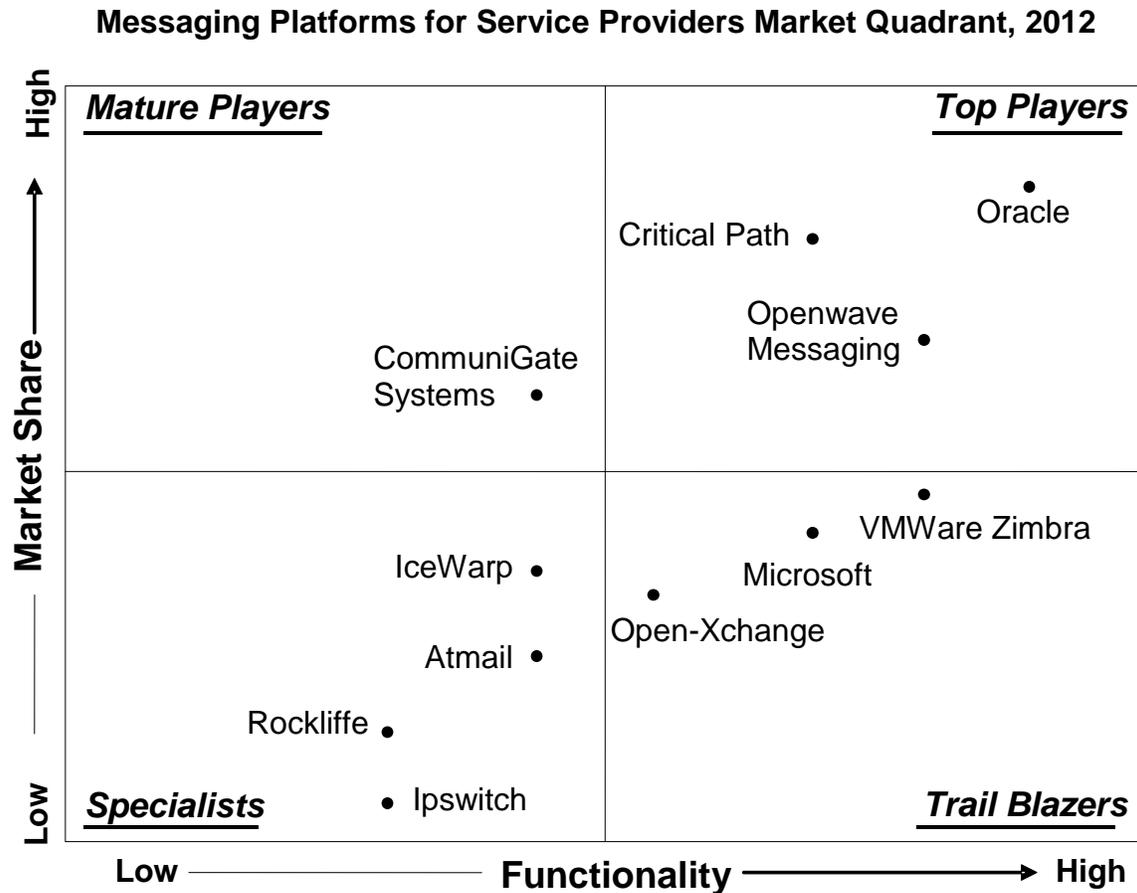


Figure 3: Messaging Platforms for Service Providers Market Quadrant, 2012

* Radicati Market QuadrantSM is copyrighted November 2012 by The Radicati Group, Inc. Reproduction in whole or in part is prohibited without expressed written permission of the Radicati Group. Vendors and products depicted in Radicati Market QuadrantsSM should not be considered an endorsement, but rather a measure of The Radicati Group’s opinion, based on product reviews, primary research studies, vendor interviews, historical data, and other metrics. The Radicati Group intends its Market Quadrants to be one of many information sources that readers use to form opinions and make decisions. Radicati Market QuadrantsSM are time sensitive, designed to depict the landscape of a particular market at a given point in time. The Radicati Group disclaims all warranties as to the accuracy or completeness of such information. The Radicati Group shall have no liability for errors, omissions, or inadequacies in the information contained herein or for interpretations thereof.

KEY MARKET QUADRANT TRENDS

- *Oracle, Critical Path, and Openwave Messaging* rank as **Top Players** in the Messaging Platforms for Service Providers market.
 - *Oracle* currently maintains the largest installed base for service providers with its Oracle Communications Unified Communications Suite. The platform offers robust functionality, high scalability, and reliability for tier 1 and 2 service providers. The platform is highly flexible, and allows users to communicate and collaborate on a multitude of devices. In addition, service providers can easily integrate the platform into their current infrastructure. For future versions, Oracle is exploring greater social integration as well as a completely unified interface with Convergence, the platform's web client. Oracle is well positioned to remain a major player in the Messaging Platforms for Service Providers market.
 - *Critical Path* has expanded its portfolio to deliver numerous deployment options, including both software and appliance offerings. Integration with Laszlo Systems' Webtop, the result of Critical Path's latest acquisition, allows Critical Path to provide a complete set of email and collaboration solutions all under one unified user interface. Overall, Critical Path provides a robust and highly scalable solution for service providers of any size.
 - *Openwave Messaging*, which re-launched as a private entity in May 2012, is placing openness and five-nines availability of its platform at the forefront. The Universal Messaging Suite™ is not only scalable, but also an open platform, as it allows tier 1 and 2 service providers to utilize APIs to create and integrate their own applications for subscribers. The platform is ideal for service providers looking to provide a secure and unified experience to their subscribers.
- *VMWare Zimbra, Microsoft, and Open-Xchange* rank as **Trail Blazers**. These vendors offer innovative and feature-rich platforms in the Messaging Platforms for Service Providers market. However, these companies have not yet built up the large market share that would position them as Top Players. As these companies

build momentum and grow their installed base, they are likely to move into the Top Player quadrant.

- *VMWare Zimbra* is the developer of a highly powerful email and collaboration platform that excels in providing a virtualized deployment option for customers, a staple of the platform since Zimbra's acquisition by VMWare in 2010. With the release of Zimbra 8, VMWare Zimbra has shifted its focus to web access, mobile, unified communication integration with Cisco and Mitel, applications, data, and collaboration as a service. In addition, VMware Zimbra will be providing a new offline experience in future releases. VMware Zimbra Collaboration Server will continue to see success with service providers looking for an easy-to-support solution that offers rich functionality.
- *Microsoft* is focused entirely on deployment by business-oriented service providers. The platform supports multi-tenancy, aims to simplify end-user management for administrators, maximize server resilience, and minimize server downtime, all of which help reduce IT costs. With the upcoming release of Microsoft Exchange Server 2013, Microsoft will continue to set the pace for innovation, offering greater functionality for business-oriented service providers.
- *Open-Xchange* offers a platform that is built on a modular design, allowing service providers to utilize individual components of the platform that best suits their needs. Open-Xchange provides strong social media integration directly into its interface via the Social OX module. In addition, Open-Xchange offers a flexible platform, in that the the front-end can easily be integrated onto an existing back-end. Open-Xchange is a highly scalable and customizable platform that allows service providers to offer a cohesive experience and feature-rich experience to subscribers.
- *IceWarp, Atilmail, Rockliffe, and Ipswitch* are in the **Specialist** quadrant. These email platform vendors play primarily in the lower end of the market and typically offer their platforms to tier 3 and tier 4 service providers. We expect these players to gain more traction as small service providers continue to migrate away from freeware platforms.

- *IceWarp*'s platform is highly adaptable and affordable, making it ideal for smaller service providers. The IceWarp Messaging Server allows service providers to customize packages to deliver to subscribers via a modular design. In addition, the platform's easy setup and administration allows tier 3 and 4 service providers to reduce costs associated with deployment.
- *Atmail*'s Webmail Client and Email Server provide ISPs with a robust yet simple to manage solution. The platform emphasizes simplicity, especially with administration, allowing service providers to avoid costly administrative overhead. Atmail's future plans indicate a push for innovation without compromising the simplicity and scalability of their current platform.
- *Rockliffe*'s MailSite Fusion is a highly scalable platform at an economical price point which provides all necessary industry standard features in an attractive single bundle offering. The platform provides smaller service providers with industry standard messaging solutions and places an emphasis on mobility and security.
- *Ipswitch*'s IMail Server offers customization of features for service providers, as well as an emphasis on email security. In addition, Ipswitch also offers a highly flexible pricing model that allows service providers to greatly diminish the TCO of the platform.
- *CommuniGate Systems* ranks as a **Mature Player**. This company has a large installed base, but has not kept pace in terms of innovation with other big players in the market space.
 - *CommuniGate Systems* provides solutions for tier 2 and 3 service providers with a complete package of unified communications and groupware capabilities that are accessible on virtually any platform. CommuniGate Pro is focused on delivering email, collaboration, and real-time solutions. CommuniGate Systems is attempting to further expand the platform's reach by offering multiple deployment options.

MESSAGING PLATFORMS FOR SERVICE PROVIDERS - VENDOR ANALYSIS

TOP PLAYERS

ORACLE

500 Oracle Parkway
Redwood Shores, CA 94065
www.oracle.com

Founded in 1977, Oracle develops hardware and software for the cloud and the data center. In 2010, the company acquired Sun Microsystems and rebranded the Sun Java Systems Communications Suite to the **Oracle Communications Unified Communications Suite**. The platform is a comprehensive portfolio of secure email and collaboration applications that enables access to communications on desktop, web, and mobile. It is built on a modular design, allowing service providers to implement any number of the suite's numerous offerings. The portfolio consists of the messaging server, a calendar server for calendar management, an instant messaging server, and a mobile synchronization server. The Oracle Communications Unified Communications Suite includes Convergence, a robust web client that integrates various communication services and includes productivity enhancing features and capabilities, including access to popular social networks, a connector to Microsoft Outlook 2003-2010, and a server-based indexing and search engine to provide deep searches and offer pin-point results. Service providers can extend and enhance the suite using its open and published interfaces to bring their core network assets into their branded offering, as well as extend the suite via partner solutions.

In future releases, Oracle will integrate core communication features provided by Oracle Communications Converged Application Server, an application server that delivers a carrier-grade, open standards-based development and deployment platform for next generation applications.

FUNCTIONALITY: 9

MARKET SHARE: 1

KEY STRENGTHS:

- Oracle Communications Unified Communications Suite has a strong reputation as a highly reliable platform. The platform has strong high availability (HA) architecture to ensure business continuity.
- Oracle Communications Unified Communications Suite is extensible, allowing service providers to fully customize the suite's many components and choose to deploy the solutions that best fit their needs. APIs allow service providers to develop and integrate their own features, such as click-to-call, compliance and archiving, voice messaging, and more.
- Convergence allows end-users to access social networking sites directly from the interface without having to exit the web client.

KEY WEAKNESSES:

- The Oracle Communications Unified Communications Suite cannot be deployed on Microsoft Windows environments.
- Oracle Communications Unified Communications Suite does not offer a built-in archiving solution. Customers will need to look to third-party solutions for this.

CRITICAL PATH

2655 Campus Drive, Suite 250,
San Mateo, California 94403
USA

www.cp.net

Founded in 1997, Critical Path (CP) is the developer of the **CP Portfolio**, a comprehensive suite of email and collaboration solutions for enterprises and service providers, available as appliance, software or cloud service. In February 2012, CP acquired Laszlo Systems, developer of the Webtop platform. Along with Mirapoint Software, which was acquired in 2010, CP now integrates both companies' solutions into the CP Portfolio. The portfolio comprises of a white-label messaging platform, an in-house email security system that protects against both spam and viruses, and the Laszlo Webtop, a unified communications interface.

Since merging with Mirapoint, CP has announced it will integrate capabilities of the software platform, such as support for Exchange ActiveSync and SmartStore storage optimization, into both appliance and cloud services offerings. These capabilities are expected to be generally available in late 2012 or early 2013.

FUNCTIONALITY: 7

MARKET SHARE: 2

KEY STRENGTHS:

- The CP Portfolio is a cost-effective, flexible, and scalable white-label messaging platform.
- The CP Messaging Platform, including Webtop, provides end-users with a comprehensive set of unified communications solutions, all under a single user interface.
- CP's software suite provides support for multiple mobility options, including Microsoft Exchange ActiveSync (EAS), OMA DS (syncML), IMAP IDLE, and mobile web, for both basic & smartphone devices.

KEY WEAKNESSES:

- The CP platform deployment on Microsoft Windows server platforms is limited to the email, directory and Webtop components.
- Exchange ActiveSync, an industry standard for mobility, has not yet been extended from the software offering into the appliance package, but is due for launch in Q4'2012 with CP's Cloud Sync product.

OPENWAVE MESSAGING INC.

2100 Seaport Boulevard
Redwood City, CA 94063
www.openwavemessaging.com

Openwave Messaging was recently acquired by Marlin Equity Partners and launched as a private company in May 2012. The **Universal Messaging Suite™** is Openwave Messaging's open and flexible messaging environment. It delivers a complete messaging solution in one integrated environment powered by a flexible infrastructure based on a single message store and a single directory. Openwave Messaging offers a robust and flexible Mx Messaging Platform, Security and Anti-Abuse Solutions, Subscriber and Identity Management, and professional services which includes Hosting and Managed Services. The platform also offers a unified end-user experience through a webmail client and mobile support.

In future releases, Openwave Messaging will continue to increase the openness of its platform, allowing developers to utilize open APIs to create and integrate their own applications. In addition, Openwave Messaging offers additional deployment options such as hosted, on premise managed and hybrid cloud deployment models to add flexibility to the platform.

FUNCTIONALITY: 8

MARKET SHARE: 3

KEY STRENGTHS:

- The Universal Messaging Suite is a highly scalable, highly configurable, open & flexible environment that is easy to integrate with internal systems, application mash-ups and external partners. The products all use a single message store and a single directory, providing access to multiple services from a single platform.
- The Universal Messaging Suite is a highly reliable platform that can offer 99.999% SLAs. The UMS offers Active/Active Geo-redundancy out-of-the-box, allowing simultaneous access to a mailbox from multiple data centers. This

enables service providers to offer business continuity services without the need for expensive HA licenses.

- Rich Mail serves as a communications hub, allowing the user to access different social media communities concurrently, enabling effective cross-platform communications using a single interface and login.

KEY WEAKNESSES:

- While Rich Mail does offer a mobile webkit client, it is only available for Apple iOS and Google Android mobile devices.
- The Universal Messaging Suite does not include an instant messaging solution, a feature that many of their competitors include as part of their package.

TRAIL BLAZERS

VMWARE ZIMBRA

3401 Hillview Ave
Palo Alto, CA 94304
www.zimbra.com

Founded in 2004 and headquartered in the Silicon Valley, VMware Zimbra offers **VMware Zimbra Collaboration Server (ZCS)**, an email, calendaring and collaboration platform that can be deployed on a Linux server environment or as a software virtual appliance on vSphere by service providers. The messaging platform also comes bundled with a webmail client called **Zimbra Web Client**, as well as a desktop version called **Zimbra Desktop** that can be installed on Mac, Windows and Linux desktops and has the same functionality across all platforms. VMware Zimbra Collaboration Server also supports mobile synchronization via Zimbra Mobile, third-party security features, and archiving and compliance via Zimbra Archiving and Discovery.

The latest release of the server, **Zimbra 8**, places an emphasis on virtualization with their software virtual appliance and cloud-based email solutions. In future releases, Zimbra plans to continue leading with a browser-based experience while leveraging offline technologies to replace their current desktop client.

FUNCTIONALITY: 8

MARKET SHARE: 5

KEY STRENGTHS:

- The latest update, Zimbra 8.0, pushes towards complete virtualization of the collaboration server, allowing for reduced hardware overhead and access to the server at any time and location.
- Zimlets allow service providers and customers to extend the functionality of the web client, such as the integration of third-party social media or enterprise applications such as Webex and Salesforce.com.

- Zimbra Collaboration Server supports the latest version of ActiveSync and Blackberry Enterprise Server, allowing for over-the-air synchronization with Apple iOS, Android, Windows Phone, and RIM BlackBerry devices.

KEY WEAKNESSES:

- VMware Zimbra Network Edition reserves several key features that are standard in competitors' solutions for the more expensive Professional Edition, such as Outlook synchronization, smartphone synchronization, and email archiving.
- The standard on-premises deployment of VMware Zimbra is currently only available for a Linux server environment, or as a software virtual appliance on vSphere.

MICROSOFT

1 Microsoft Way
Redmond, WA 98052-6399
www.microsoft.com

Founded in 1975, Microsoft is the world's largest supplier of software products and services for businesses. **Microsoft Exchange Server** is Microsoft's flagship email and collaboration platform, and with the release of Microsoft Exchange Server 2010, the platform is optimized for business-oriented service providers. Microsoft Exchange Server offers full desktop client support for Microsoft Outlook, and includes a webmail client, Microsoft Outlook Web App (OWA), as well as Microsoft Exchange ActiveSync (EAS) support. The platform also includes the Database Availability Group (DAG) for High Availability and Disaster Recovery and robust administrative capabilities.

Microsoft Exchange Server 2013 is expected to be released in early 2013, and will add greater social network integration and real-time anti-spam detection.

FUNCTIONALITY: 7

MARKET SHARE: 6

KEY STRENGTHS:

- Microsoft Exchange Server 2010's "Hosting Mode" enables service providers to access commands and parameters to configure multiple subscribers' settings at once.
- Hosted Exchange providers can also leverage Mailbox Plans for hosted deployments of Microsoft Exchange Server 2010. This allows service providers to assign default mailboxes to users with default configurations.
- Microsoft Exchange Server 2010 enables anywhere access for all of its messaging and collaboration features, regardless of platform, PC, web browser, and mobile device. This includes access to: email, voicemail, calendaring, contacts, instant messaging (IM), archived messages, and SMS.

KEY WEAKNESSES:

- For service providers, Microsoft Exchange Server 2010 does not offer the best scalability compared to other Messaging Platforms. Microsoft Exchange Server 2010 generally requires more work to meet the scalability demands of larger service providers.
- With the release of Microsoft Exchange Server 2010, Microsoft has retired its solution for Hosted Messaging and Collaboration (HMC) platform. Service providers who have built their infrastructure around the HMC platform are required to replace it when deploying Microsoft Exchange Server 2010.
- The cost of running Microsoft Exchange Server 2010 in-house is higher than previous versions.

OPEN-XCHANGE

303 South Broadway
Tarrytown, New York 10591
www.open-xchange.com

Open-Xchange is a Linux-based email and collaboration platform that is built on an open-source framework. The platform supports collaboration features, such as groupware, document and calendar sharing, and full social network integration. In addition, Open-Xchange also offers a robust webmail client, as well as support for Microsoft Exchange ActiveSync and AstraSync for synchronization of smartphone and BlackBerry devices. Due to the open standard and the API richness, Open-Xchange can be integrated into any cloud or hosted infrastructure. Open-Xchange is built on a modular design, which allows service providers to add components as they see fit.

Open-Xchange Server 7 will be released by the end of 2012, while the full web desktop will be released in 2013. Server 7 provides an extensible, lightweight, and non-disruptive experience on desktop, mobile, and tablet clients. In addition, the platform will add chat functionality, as well as greater integration with social platforms.

FUNCTIONALITY: 6

MARKET SHARE: 8

KEY STRENGTHS:

- Open-Xchange is a highly scalable platform.
- Open-Xchange provides service providers with an upsell strategy for higher level features such as collaboration, which allows service providers to easily roll-out value-added services, thus generating more revenues.
- Open-Xchange offers robust social media integration via Social OX, which aggregates sites such as Gmail, LinkedIn, Facebook, Twitter, and Xing into a single user-interface. In addition, contacts are synchronized with addresses from these social networks.

KEY WEAKNESSES:

- Open-Xchange can only be deployed on Linux platforms.
- Open-Xchange does not currently include a built-in instant messaging (IM) and presence awareness solution in the current Open-Xchange Server 6 edition. However, IM and presence will be included in the Open-Xchange Server 7 edition in 2013.

SPECIALISTS

ICEWARP

6506 Loisdale Road
3rd Floor
Springfield, VA 22150
www.icewarp.com

Founded in 1999, IceWarp's core offering is the **IceWarp Messaging Server**, which combines several forms of communications, including email, Jabber-based Instant Messaging (IM), VoIP, SMS, and mobile email, together for a fully unified communications platform. IceWarp 11, the latest version of the platform, includes many upgrades to existing features, the introduction of cloud-based services and online meetings capabilities, and an interface that has been fully optimized for tablets. The platform includes a desktop and webmail server, as well as Microsoft Exchange ActiveSync support. The IceWarp Messaging Server provides robust anti-malware solutions and an optional archiving solution powered by Mailstore.

FUNCTIONALITY: 5

MARKET SHARE: 7

KEY STRENGTHS:

- IceWarp Messaging Server is a modularly designed messaging and collaboration platform. This allows service providers to deploy additional components on an as needed basis. All modules are present in the original installation and can be activated by additional license keys when needed.
- IceWarp includes an integrated secure XMPP/Jabber secure IM server with archive and gateway extension. Additionally, there are gateways to over 10 different public IM networks, including AIM, MSN, QQ, Sametime, Facebook, and Yahoo!
- IceWarp is easy to administer. The company claims that a new server node can be deployed within minutes.

KEY WEAKNESSES:

- Although IceWarp offers a Linux-based version of the IceWarp Communications Server, the platform is only a port of the Microsoft Windows version and is not open source. This may disappoint Linux enthusiasts. Security concerns are the main reason for this approach, along with Windows compatibility considerations.
- Though IceWarp's platform is compatible with BlackBerry devices, a separate synchronization application is required, which must be purchased separately.

ATMAIL

Shop 1a, 66 Old Bells Line of
Rd Kurrajong, NSW, 2758,
Australia
www.atmail.com

Founded in 1998, Atmail offers email and collaboration solutions to service providers. **Atmail Email Server** is a comprehensive messaging server for Linux and Unix platforms that is also capable of running on Xen or VMware via a Linux Virtual Machine. Atmail Email Server includes groupware features, security technologies powered by SpamAssassin and ClamAV, Microsoft Exchange ActiveSync for mobility, and a standalone archiving solution, ArchiveVault. Atmail Email Server offers a similar, browser-based experience, via its Atmail Webmail Client.

Though Atmail Email Server does not currently include an instant messaging solution, Atmail has plans to integrate this into future iterations of the email server. Atmail is also introducing **Atmail Cloud**, a cloud-based email service, which will allow customers to adopt a cloud-based model or deploy a hybrid solution.

FUNCTIONALITY: 5

MARKET SHARE: 9

KEY STRENGTHS:

- For Atmail 6.1.7 versions and above, service providers can deploy available plugins that Atmail offers or create their own, which extends the functionality of the Atmail server.
- Atmail offers a Telco grade VoIP solution with a webmail based, plug-in free browser phone, which integrates with the carrier's VoIP system, billing, and SMSC.
- Atmail has fully licensed the Microsoft Exchange ActiveSync (EAS) protocol for push email and over-the-air synchronization of contacts and calendars with Apple iPhone, Windows Phone, and Android handsets.

KEY WEAKNESSES:

- Atmail does not integrate mobile messaging synchronization with BlackBerry devices into their platform.
- Atmail does not currently support IM, a common feature of competitors' platforms.
- Although Atmail offers a Microsoft Outlook synchronization plug-in, the plug-in is limited to only synchronization of contacts and calendars. End-users looking for more advanced Microsoft Exchange-based features will be disappointed.

ROCKLIFFE SYSTEMS

1901 South Bascom Ave, Suite 900
Campbell, CA 95008
www.rockliffe.com

Founded in 1995, Rockliffe develops **MailSite Fusion**, a Microsoft Windows-based email and collaboration server that delivers scalable calendar sharing across multiple clients via the **MailSite Calendar Server**, as well as web-based email and groupware features via the **MailSite ExpressPro** webmail client. MailSite Fusion also offers optional security measures. Rockliffe has partnered with AVG to provide anti-virus support and Mailshell for anti-spam support. For mobility, MailSite Fusion integrates with a Microsoft Exchange ActiveSync-compatible server and AstraSync.

Near the end of 2012, Rockliffe plans to unveil **MailSite Fusion Version 10**, which will enhance performance as well as add support for BlackBerry Playbook, and integrate Rockliffe's XMPP chat service into the platform.

FUNCTIONALITY: 4

MARKET SHARE: 10

KEY STRENGTHS:

- MailSite Fusion is highly scalable; it is able to accommodate millions of users on one cluster of servers.
- Rockliffe maintains partnerships with Mailshell and AVG for anti-spam and antivirus solutions, which can be layered on top of MailSite Fusion's built-in security measures.
- MailSite Fusion offers robust mobile support for all major mobile devices, including: Apple iOS, Windows Phone, Windows Phone, Google Android, and BlackBerry devices.

KEY WEAKNESSES:

- MailSite Fusion is only compatible with Windows operating systems.
- Automated updates for anti-virus and anti-spam filters require an additional subscription fee.

IPSWITCH

10 Maguire Road
Suite 200
Lexington, MA 02421
www.ipswitch.com

Ipswitch was founded in 1991, with a core focus on offering IT products designed for ease-of-use and business impact. In 1995, the company began offering **IMail Server**, an easy-to-maintain and cost effective email solution for SMBs and tier 2 and 3 service providers. The messaging server, compatible with Windows, connects with various standards-based email clients, specifically Microsoft Outlook, Microsoft Outlook Express, or Eudora, as well as through a webmail client, **IClient**. IMail Server also comes with an Outlook connector. Ipswitch also offers robust security features, which include three different anti-virus technologies and the Hacked Account Mail Regulator (HAMR). Ipswitch provides businesses and ISPs with an optional, upgraded version of IMail Server: **IMail Server Premium**, which includes additional spam filtering protection through Commtouch Premium. A standalone instant messaging (IM) solution, **Ipswitch Instant Messaging**, is also bundled with IMail Server. Email archiving powered by MailArchiva Enterprise Edition and a Microsoft Exchange ActiveSync server are offered as optional solutions.

In addition to IMail Server, Ipswitch also offers **Hosted IMail**, a solution for businesses and ISPs looking to make the move to the cloud.

FUNCTIONALITY: 4

MARKET SHARE: 11

KEY STRENGTHS:

- IMail Server can be purchased for an unlimited number of users. This is most useful to service providers who provide email to a large number of subscribers.
- Ipswitch's introduction of HAMR in the latest IMail Server update ensures server stability in the event of a user account being hacked.

- IMail Server comes with a licensed version of Microsoft Exchange ActiveSync (EAS), which allows Ipswitch to guarantee greater compatibility with Apple iPhone, Windows Phone, and Android devices.

KEY WEAKNESSES:

- IMail Server does not support multiple operating systems; it is only compatible with Microsoft Windows.
- IMail's more robust security offerings are reserved for purchasers of the IMail Premium package.
- Although IMail Server comes with a secure IM solution, it is not interoperable with other IM clients.

MATURE PLAYERS

COMMUNIGATE SYSTEMS

655 Redwood Hwy, Ste 275
Mill Valley, CA 94941
www.communiGate.com

Founded in 1991, CommuniGate Systems develops open-standards messaging and collaboration solutions for both enterprises and telecommunication companies. CommuniGate currently operates five offices worldwide.

PRODUCTS

CommuniGate Pro is a complete unified communications (UC) platform for enterprises and service providers that can be deployed on a variety of different operating systems. The platform delivers email, groupware, instant messaging (IM), shared calendars and contacts, voicemail, video, and VoIP for a complete unified communications (UC) experience. In addition, CommuniGate Pro also includes **Mobile Office** for mobile email synchronization and provisioning with popular mobile devices, and **Pronto!**, CommuniGate's client which allows for access to a unified CommuniGate Pro experience from a web, desktop, or mobile interface.

CommuniGate Systems also offers a hosted solution based on the CommuniGate Pro platform: **Email Guru**.

CommuniGate Systems offers a **Virtualization Adaptor Kit**, a version of CommuniGate Pro for the hosting server market.

FUNCTIONALITY: 5

MARKET SHARE: 4

KEY STRENGTHS:

- CommuniGate Pro is a single server unified communications solution, allowing for multi-tenancy and reduced overhead.

- The Pronto! client is highly extensible, allowing developers to expand the client to include support for business and social third-parties, such as Salesforce.com and Facebook.
- UC Centrex provides ISPs with a robust unified communications experience that includes instant messaging (IM), collaboration features such as video conferencing and whiteboarding, HD voice, and VoIP.

KEY WEAKNESSES:

- While anti-virus and anti-spam solutions are available for integration with CommuniGate Pro, they require customers to pay an additional fee.
- Mobile Office does not support Blackberry devices out of the box, but requires customers to purchase AstraSync for Blackberry compatibility.

THE RADICATI GROUP, INC.
<http://www.radicati.com>

The Radicati Group, Inc. is a leading Market Research Firm specializing in emerging IT technologies. The company provides detailed market size, installed base and forecast information on a worldwide basis, as well as detailed country breakouts, in all areas of:

- **Email**
- **Security**
- **Instant Messaging**
- **Unified Communications**
- **Identity Management**
- **Web Technologies**

The company assists vendors to define their strategic product and business direction. It also assists corporate organizations in selecting the right products and technologies to support their business needs.

Our market research and industry analysis takes a global perspective, providing clients with valuable information necessary to compete on a global basis. We are an international firm with clients throughout the US, Europe and the Pacific Rim.

The Radicati Group, Inc. was founded in 1993, and is headquartered in Palo Alto, CA, with offices in London, UK.

Consulting Services:

The Radicati Group, Inc. provides the following Consulting Services:

- Management Consulting
- Whitepapers
- Strategic Business Planning
- Product Selection Advice
- TCO/ROI Analysis
- Multi-Client Studies

*To learn more about our reports and services,
please visit our website at www.radicati.com.*

MARKET RESEARCH PUBLICATIONS

The Radicati Group, Inc. develops in-depth market analysis studies covering market size, installed base, industry trends and competition. Current and upcoming publications include:

Currently Released:

Title	Released	Price*
Messaging Platforms Market, 2012-2016	Oct. 2012	\$3,000.00
Corporate IT and Business User Survey, 2012-2013	Sept. 2012	\$3,000.00
Hosted Email and Collaboration Market, 2012-2016	Aug. 2012	\$3,000.00
Information Archiving Market, 2012-2016	July 2012	\$3,000.00
Microsoft Office 365- Analysis and Forecast, 2012-2016	June 2012	\$3,000.00
Social Media Market, 2012-2016	June 2012	\$3,000.00
Endpoint Security Platforms, 2012-2016	May 2012	\$3,000.00
Enterprise Content Management Market, 2012-2016	Apr. 2012	\$3,000.00
Email Statistics Report, 2012-2016	Apr. 2012	\$3,000.00
Microsoft Exchange Server and Outlook Market Analysis, 2012-2016	Mar. 2012	\$3,000.00
Microsoft SharePoint Market, 2012-2016	Mar. 2012	\$3,000.00
Google Apps vs. Microsoft 365: An Analyst Comparison, 2012-2016	Mar. 2012	\$3,000.00
Corporate Web Security Market, 2012-2016	Feb. 2012	\$3,000.00
Instant Messaging Market, 2011-2015	Dec. 2011	\$3,000.00
eDiscovery Market, 2011-2015	Nov. 2011	\$3,000.00

* Discounted by \$500 if purchased by credit card.

Upcoming Publications:

Title	To Be Released	Price*
Mobile Security Market, 2012-2016	Dec. 2012	\$3,000.00
Instant Messaging Market, 2012-2016	Dec. 2012	\$3,000.00

* Discounted by \$500 if purchased by credit card.

All Radicati Group reports are available online at <http://www.radicati.com>.

MANAGEMENT STAFF

Sara Radicati, PhD

President & CEO

Sara is a computer scientist, author, entrepreneur and industry analyst. Sara was a pioneer in the early development of unified communications, email, directory services and security systems. She played an active role in the development of several international standards for networking and communications, and served on the board of directors of various industry associations, as well as Interop.

In 1993, she founded The Radicati Group an analyst firm specialized in tracking emerging communication and collaboration technologies. The company provides quantitative and qualitative market research, as well as advises corporate clients on procurement issues, and works with vendors and network operators to help them define their business strategy and product direction. The company also works frequently with investment funds to perform due-diligence and evaluate new opportunities.

Prior to founding The Radicati Group, Sara was lead architect for network protocols at Xerox Corporation and held management positions at 3Com and Novell.

Sara holds Computer Science degrees from Queens College CUNY, and the California Institute of Technology.