



THE RADICATI GROUP, INC.

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Corporate IT Survey – Messaging and Collaboration, 2010-2011

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SCOPE

This survey, designed and administered by The Radicati Group, Inc. in mid-2010, examines the attitudes and procurement plans of corporate IT organizations with regards to messaging and collaboration. The survey was conducted across 100 business organizations of all sizes worldwide, representing a total of 347,448 email users.

The questionnaire used in the study aimed at identifying trends in the following areas:

- IT Budgets & Priorities
- On-Premises vs. Hosted Email Preference
- On-Premises Email Deployments
- Storage
- Hosted Email Deployment
- Hybrid Deployments
- Email Clients
- Microsoft SharePoint Use
- Email Security
- Email Archiving, eDiscovery, Data Loss Prevention
- Instant Messaging
- Social Networks
- Wireless Email
- Unified Communications

All currency figures are expressed in \$USD.

METHODOLOGY

The data and analysis contained in this study is based on primary research in the form of data collected from a specifically designed questionnaire which was administered by email and/or by phone to survey respondents worldwide in mid 2010.

Experienced analysts from The Radicati Group, Inc. collected and analyzed the data. Respondents included many high level IT executives, vice presidents, directors, network administrators, messaging architects, systems managers, systems engineers, and other corporate decision makers. Survey responses were collected from companies of all sizes, in various industries, worldwide.

EXECUTIVE SUMMARY

- The goal of this survey was to understand IT budgets, current deployment and plans for future adoption of messaging and collaboration solutions, including: email security, archiving, eDiscovery, Data Loss Prevention (DLP), instant messaging, Microsoft SharePoint, social networks, wireless email and unified communications.
 - This study was administered to 100 organizations worldwide ranging in size from SMBs to large organizations with over 10,000 users.
- Surprisingly, despite the economic slowdown, a large number of organizations surveyed (i.e. 47%) indicated that their IT budgets increased from 2009 to 2010. This can be attributed in part to 2009 spending that was postponed to 2010, as well as the fact that many IT expenditures are being directed at improving efficiency and therefore reducing operational costs.
- For the first time this year, security was no longer the top concern of most IT organizations. It was replaced by “Reducing IT costs” as the top concern for most organizations across all business sizes. “Moving to hosted/cloud based services” was the second top IT concern, with “Security” in third place.
 - Most of organizations surveyed (48%) felt that the amount of spam that reaches their networks remained fairly constant over the past 12 months, whereas 39% of organizations reported an increase in the amount of spam and 13% actually reported a decrease.

- Despite the strong push towards hosted services, when it came to email and collaboration most organizations still showed a strong bias towards on-premises solutions. Of the organizations we surveyed, 71% had an on-premises messaging and collaboration solution, whereas 16% had a hosted solution and 13% had a hybrid solution.
 - When asked what would motivate their organization to move to a hosted email and collaboration solution, the most prevalent response was “Better Security Guarantees”, followed by “Lower Cost Proposition”, which shows that organizations are still more sensitive about security than costs when it comes to hosted email.
- Storage use continues to grow, with organizations indicating they are allocating an average of 10 GB per user, and 2.6 TB per server of storage. When asked about what type of storage solution they use, the most prevalent response was Storage Attached Network (SAN) solutions.
 - 42% of the organizations surveyed indicated they plan to increase their server storage allocation in the next 12 months, by an average of 60%.
- The use of Microsoft SharePoint has become more prevalent with organizations of all types, with 36% of organizations surveyed indicating they currently deploy some version of Microsoft SharePoint. Out of the 64% not currently deploying it, 23% indicated they have plans to deploy it in the next 12 months.
 - Organizations are using Microsoft SharePoint for a broad range of applications, but document management and collaboration seems to be the most prevalent use at this time.
- In terms of email archiving, 72% of survey respondents indicated they currently have an archiving system in place. However, it should be noted that 15% of these said they were using a home-grown solution which effectively may be nothing more than a basic backup facility. Whereas 28% of respondents said their organizations do not currently have an archiving solution in place and rely only on PST files.
 - While 65% of respondents indicated that email is their main archiving priority, archival of files/documents and Microsoft SharePoint were respectively the second and third most important type of information organizations are looking to archive.
- Instant Messaging has become more mainstream than ever before with 85% of organizations reporting that their organization is deploying a company-sanctioned IM solution for all employees

to use. In addition, most organizations also allow employees to use a range of other IM solutions of their choice.

- Social networking was also very popular with all organizations surveyed, with all respondents saying that employees in their organizations use multiple social networking sites on a daily basis, and 35% of respondents indicating that their organization has one main company-sanctioned social networking site for their entire organization.
 - “Customer interactions and discussion”, “document management and sharing” and “internal employee discussion” were the most popular uses of social networking sites in the workplace.
- Wireless email is prevalent in most organizations (i.e. 81% deploy wireless email to their users), however, only 25% of organizations surveyed provide company-paid wireless email to all their employees whereas the majority provide wireless email to only select departments or groups of users.
- In terms of unified communications, a growing percentage of organizations, 44% this year, are deploying a unified communications solution. This is considerably higher than last year, when only 21% of organizations surveyed were deploying unified communications. An additional 10% of organizations indicated that they plan to deploy a unified communications solution in the next 12-18 months.
- Figure 1, below shows organizations’ top IT priorities in 2010.

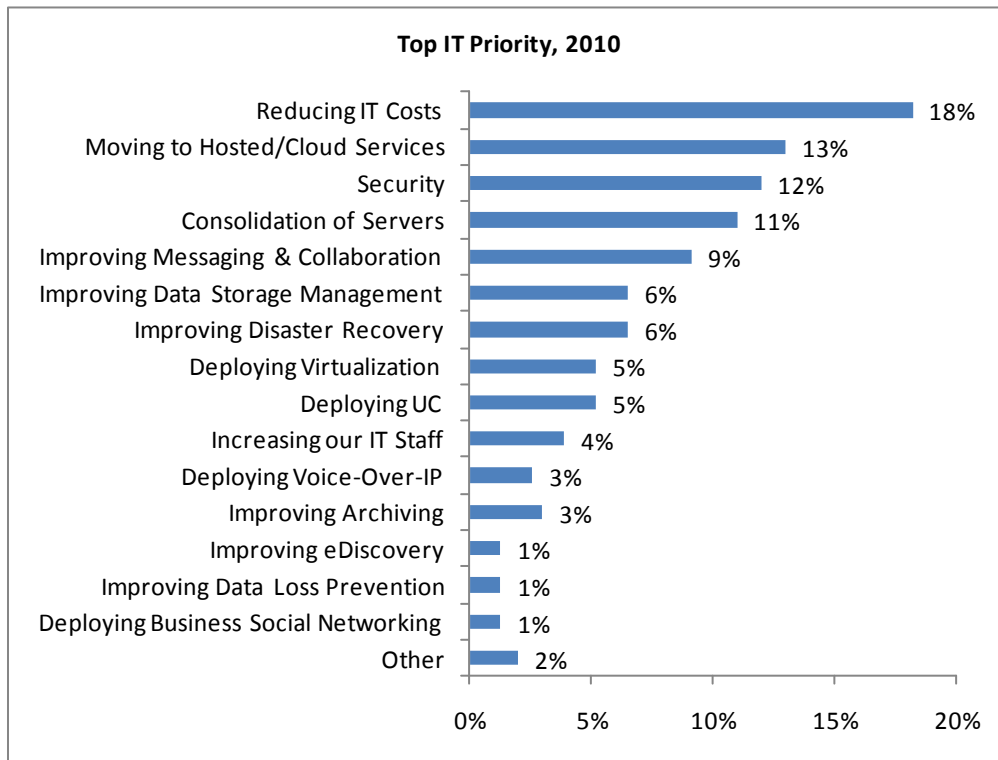


Figure 1: Top IT Priorities, 2010

Note: “Other” included the following write in responses: “Setting up an Extranet for Partners”, and “Cancelling Data Outsourcing deals & bringing skills and datacenters back in-house to cut costs”.

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