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*InfoTrends is the leading worldwide market research and strategic consulting firm for the digital imaging and document solutions industry. We provide research, analysis, forecasts, and advice to help clients understand market trends, identify opportunities, and develop strategies to grow their businesses. Additional information about InfoTrends is available on the Web at [www.infotrends.com](http://www.infotrends.com).*

## **Gathering MOSS? Revealing SharePoint Opportunities & Costs**

- **Discover** – the real market penetration, use, and cost of SharePoint across a broad range of business sizes and vertical industries
- **Uncover** – the perceptions of budgetary decision-makers relative to SharePoint-based solutions
- **Reveal** – the profit pools and threats created by the SharePoint platform

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## Who Should Subscribe?

- MFP OEMs
  - ISV's Software Companies
  - Channel Participants
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## Introduction

Microsoft Office SharePoint Server (MOSS) 2007 has garnered substantial attention and adoption in recent months. Market data indicates that MOSS will reach over \$1B in revenue and 110M licenses in 2008. Microsoft partners and developers are realizing large revenues around SharePoint add-ons, widgets, services, and solutions; and major OEMs and VARs are investigating potential partnerships around this platform. For software vendors, MOSS presents both an opportunity and a threat.

For many organizations, MOSS 2007 is part of a standard upgrade cycle. For others, the tight integration with Office 2007, Windows OS, and Windows Server components make MOSS 2007 highly relevant and adoptable for almost all businesses. MOSS could be a platform and repository option for document lifecycle requirements such capture, document management, records management and archiving, or workflow. Other MOSS use-cases include knowledge management and collaboration, social networking, project management, customer relationship management, web content management, and "Web 2.0" initiatives such as wikis and blogs.

With these opportunities come challenges, though. The MOSS landscape can be confusing for partners, developers, and users alike. MOSS licensing is complex and includes multiple server licenses, multiple Client Access Licenses (CALs) options, as well as required 'add-ons' for certain functionality. Additionally, Windows SharePoint Services v3.0 – included with Windows Server – provides services with many capabilities similar to MOSS 2007. For small and medium businesses, many may be able to get away with these services alone. That said, the total cost of ownership (TCO) of SharePoint requires additional investigation.

Today it is unclear how many CALs are being used, although estimates indicate only 10% of user licenses are active, and most activity points to MOSS as a "web-based network drive." It is also unclear how IT budget holders perceive MOSS today and how they intend to use MOSS in the future, especially given recent economic pressures and forthcoming updates to SharePoint and the Office suite. Additional questions remain around requirements and deployment of MOSS 2007 – it is unclear where Microsoft partners, OEMs, VARs and software vendors can deliver the most added value without marginalizing their existing portfolios.

InfoTrends' new multi-client study, "Gathering MOSS? (Revealing SharePoint Opportunities and Costs)," will take an in-depth look at the opportunities and challenges for MOSS 2007. The study will provide an understanding of customer behavior in relation to purchasing and engaging MOSS, what the market is currently offering, and improvements that could help maximize this emerging opportunity.

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## Project Objectives

- Quantify the penetration of MOSS 2007 on an “active user” basis
- Qualify the current and expected use of MOSS 2007 across small, medium, and large organizations as well as across vertical industries
- Understand perceptions, deployments, and challenges of MOSS 2007 for more robust solutions
- Examine the costs and requirements for deploying MOSS 2007 across a range of uses and scales
- Discover how customers engage with providers of MOSS-related services and solutions
- Evaluate the value of these engagements for various use-cases
- Enumerate the most highly demanded services, solutions, and hardware integrations around the MOSS platform today and in 2 years time

## Methodology

This study will use a combination of primary and secondary research to determine the market requirements and opportunities for Microsoft Office SharePoint Server within corporations of various sizes.

### Secondary Research

InfoTrends has conducted extensive research in the office document solutions market. Relevant research reports and forecasts will be leveraged as part of this study. We will also thoroughly examine existing market information from a variety of sources, including government and industry association data and published reports.

### Primary Research

#### ***Structured Survey with End-Users and IT Participants (approximately 600)***

InfoTrends will conduct structured interviews with end-users from small (50-99 employees), medium (100-999 employees), and large companies (1,000+ employees). The surveys will be critical in determining the project size and scope, budgets, and drivers and influencers for purchases, as well as the overall perception of MOSS. These structured survey results will also be crucial in understanding the overall customer experience and pain points.

For all aspects besides gauging market penetration, InfoTrends will target companies that are currently evaluating MOSS (pre-initiative) as well as customers that have used or are using MOSS. Target respondents will be budgetary decision-makers or direct influencers in technology purchasing with a skew towards IT roles.

#### ***Personal Interviews with Microsoft Certified Partners and/or Qualified SharePoint Developers (approximately 10)***

InfoTrends will conduct in-depth interviews with qualified SharePoint developers and Microsoft Certified Partners. The interviews will provide subscribers with a detailed understanding of the developer and partner experience for selling and implementing MOSS. These interviews will be critical for fully understanding the costs, requirements, challenges, and profit pools associated with MOSS as well as for constructing a more granular SWOT analysis of the SharePoint platform.

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## ***Personal Interviews with End Users (approximately 5)***

InfoTrends will conduct in-depth interviews with qualified end users that are currently using MOSS. The interviews will provide subscribers with a more detailed understanding of the user experience and perceptions for implementing and using various SharePoint-based solutions. These interviews will also be critical for understanding user adoption issues and change management strategies.

## ***Personal Interviews with IT Respondents (approximately 5)***

InfoTrends will conduct in-depth interviews with qualified IT respondents that are currently using MOSS. The interviews will provide subscribers with a more detailed understanding of the IT experience for evaluating, selecting, deploying, and developing various SharePoint-based solutions. These interviews also will be critical for understanding some of the challenges and profit pools associated with SharePoint.

## **Analysis & Project Deliverables**

We will conduct extensive analysis of desk research, personal interviews, and surveys to develop a comprehensive understanding of the opportunities and costs presented by Microsoft SharePoint. Clients will receive a combination of reports, presentation materials, and data for senior management, product managers and planners, and sales and marketing executives. These materials will include:

- Executive Summary with Key Findings
- PowerPoint Style Document with Bullets
- PowerPoint Presentation with Charts
- Data Tabulations

## **Schedule & Fees**

InfoTrends intends to start research for the project in January 2009. We plan to complete the research and publish the report in June 2009. We will provide clients with interim data from the structured surveys as the research is completed.

The fee for clients who sign up on or before February 13, 2009 is \$11,995. For those who sign up after February 13, 2009, the fee is \$13,995. A personal presentation is available for an additional fee of \$2,500 plus travel expenses. Additionally, clients may elect to add InfoTrends-branded, research-driven whitepapers, case studies, or webinars to support their use of the project data.

## **Terms and Conditions**

### **Liability for Advice**

Although reasonable efforts will be made by InfoTrends to ensure the completeness and accuracy of the information contained in written and oral reports in connection with the proposed study, no liability can be accepted by InfoTrends for the results of any actions taken by the client in connection with such information, opinions, or advice.

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## **Confidentiality**

InfoTrends will use its best efforts to ensure that any confidential information obtained about the client and its business during the course of the proposed study is not, unless agreed otherwise in advance, disclosed to any third party without the prior written permission of the client. InfoTrends retains the right to re-use any non-proprietary information as part of its ongoing analysis of the office automation and printing and publishing industries.

## **Timely Delivery**

InfoTrends will take all reasonable steps to ensure that the time scales called for by the proposed study are met in accordance with the agreed-upon schedule, but no liability can be accepted for the consequences of delays, howsoever caused.

## **Terms**

One half of fee upon initiation and one half upon report delivery.

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## Authorization Form

### Gathering MOSS? Revealing SharePoint Opportunities & Costs

For more information on the study or how to order, please send an e-mail to [sales@infotrends.com](mailto:sales@infotrends.com).

Please enter my order as follows (fax completed form to +1 781 616 2121):

#### Report Options:

- |   |          |
|---|----------|
| <input type="checkbox"/> Early Participation Fee (must sign by 2/13/09) | \$11,995 |
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For an additional fee, sponsors may elect to add InfoTrends-branded, research-driven whitepapers, case studies, or webinars to support their use of the project data. Please contact your InfoTrends representative or e-mail [sales@infotrends.com](mailto:sales@infotrends.com) for additional information.

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