

Magic Quadrant for Team Collaboration and Social Software, 2007

Gartner RAS Core Research Note G00151493, Nikos Drakos, 24 October 2007 R2513 10/29/2008

The collaboration support market is being revitalized, with buyers and sellers looking to add social interaction in the context of broad collaboration support. We map how new and established vendors focusing on teaming, communities and social interaction are positioned in this changing marketplace.

WHAT YOU NEED TO KNOW

The collaboration and social software market is evolving in response to the demand for a coherent set of capabilities, processes and services that span communication, coordination, communities and informal social interactions. Buyers in the collaboration support market are looking for persistent virtual environments where participants can create, organize and share information, as well as interact with each other. Established vendors with strong products in information sharing, coordination and teaming are just beginning to deliver support for social interactions. Meanwhile, relative newcomers (including open-source products) that are wiki-centric and customer-interaction-oriented are scoring early successes and gaining mind share, despite their lack of an enterprise track record. Even though most vendors are still far from delivering mature, complete and dependable suites, each could be a good choice for a particular set of requirements and context.

MAGIC QUADRANT

Market Overview

The collaboration support market is evolving in response to the demand for a coherent set of capabilities, processes and services that support a broad range of collaborative activities, including communication, coordination, communities and informal social interactions. This market was created out of a fundamental shift in buying patterns – from buying point products, to looking for broader collections of integrated technologies and services that are becoming increasingly available.

Although we still see steady demand for traditional teaming and document sharing support, what seems to be driving new interest in collaboration support is access to social software capabilities. In the past year, much of the activity on the supply side has centered on adding more open and flexible collaboration support capabilities that encourage social interaction, natural group formation and unplanned collaboration. Social software support is becoming one of the most important areas of differentiation between established vendors playing catch-up and newcomers that have managed to attract early adopters with products that provide exactly these capabilities. Beyond all the hype that surrounds social software, Web 2.0 and its application to enterprises as Enterprise 2.0, there are early signs of real business value, as this “socializing” technology helps to create and nurture connections between people and makes the collective knowledge of the people in an organization more explicit. The promise is of a “grass roots” approach to creating information and connecting people in an organization where production, organization and structure emerge from the interactions between participants.

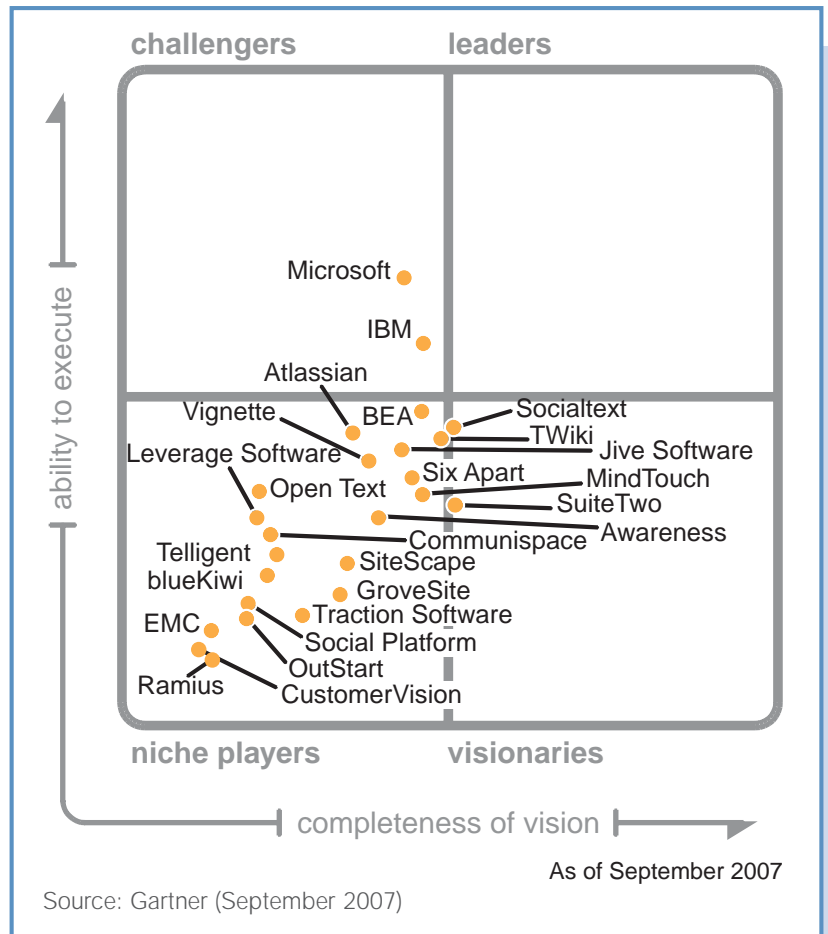
However, the amount of investment made in collaboration support for social interaction is generally small. Deployments tend to be experimental and tactical in scope, and pricing is generally reasonable, thanks partly to the availability of dependable open-source options. Although there's plenty of opportunity for market expansion, we expect that the traction enjoyed by smaller vendors will begin to erode as deployments begin to require better enterprise support, as established vendors begin to offer "good enough" capabilities, and as early adopters are joined by more conservative buyers.

The teaming and social software options available for enterprise use are expanding rapidly as innovative newcomers enter the market, and as mainstream vendors align their products with new user requirements. There is currently a discernible trend toward products that blend multiple capabilities which, in the longer term, will tend to favor those who achieve early critical mass, as well as larger vendors. The opportunities for innovation, the specific needs of different user populations and the increasing acceptance of alternative sourcing options (for example, open-source software and software as a service [SaaS]) will ensure that this remains a vibrant and competitive market for some time. The downside that accompanies any market expansion is the inevitable consolidation, which will weed out vendors with no staying power. What should be kept in mind is that this risk is not only associated with smaller vendors but also with larger vendors, perhaps content or portal vendors, whose main focus is not collaboration support but who nevertheless have seen a short-term opportunity and are rightly looking to take advantage of it. In general, although few products can claim to offer a comprehensive set of capabilities, it is already evident that functional boundaries in different products are constantly broadening and that there are very few "pure" products. Most offer a blend of different capabilities and we expect that successful products will continue to assimilate new functionality.

From Integrated Collaboration to Team Collaboration and Social Software

This Magic Quadrant replaces our previous "MarketScope for Integrated Collaboration, 1H06." Our view of the market, as reflected in user buying patterns, and our inclusion and evaluation criteria remains largely unaltered, though it is more nuanced. We have placed much more emphasis on collaboration support that

Figure 1.
Magic Quadrant for Team Collaboration and Social Software, 2007



focuses on persistent virtual environments in which participants can create, organize and share information, as well as interact with each other. We have looked for integration and interoperability with communications functionality, but have not excluded products that do not offer built-in e-mail or instant messaging, for example. This change allows us to compare a broader range of products suitable for teaming, community or social networking support, which is consistent with current demand and supply trends. The reasoning behind these market definition adjustments is detailed in "From Integrated Collaboration to Collaboration and Social Software: Market Definition Update," but note that to further emphasize the focus on teaming and social interactions, we have named this market "Team Collaboration and Social Software."

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The division between unified communications (messaging, voice and conferencing) and collaboration support is not clear cut, and overlaps are common. As deployments broaden (in terms of requirements and larger user populations), and as vendor consolidation continues, a single market is eventually likely to emerge. However, it is also important to recognize that buying decisions for these two markets will continue to be made independently, at least for the next three years, and our coverage reflects that.

Notable Absences

We considered a number of other vendors for this Magic Quadrant, but we felt that their inclusion would be inappropriate. The excluded vendors, and the reasons for their exclusion, are as follows:

- **Cisco**, through its acquisition of WebEx (see “Cisco Gets Focused on Collaboration With WebEx Buy”), has a product that meets the minimum functionality criteria and, indeed, WebEx was included in our 2006 MarketScope for Integrated Collaboration. However, its primary use is for real-time communications and Web conferencing, and is more aligned with Cisco’s unified communications portfolio. This places it outside the scope of this Magic Quadrant. Also, in early 2007, Cisco Systems acquired Five Across – a small Web publishing and social software vendor targeting consumer-facing media companies – and we will include any independently packaged products based on this acquisition as long as they meet the inclusion criteria.
- **Novell’s** Groupwise product was not included because its primary use is for e-mail, calendaring and basic information sharing. Novell has struck an OEM agreement with SiteScope and will begin to resell ICEcore Enterprise under the name Novell Teaming + Conferencing when that becomes available later in 2007.
- **Oracle** Collaboration Suite (OCS) was also excluded, again because its primary use is for communication (with e-mail, calendaring, Web conferencing and voice over Internet Protocol [VoIP]) and not for teaming or social interactions. Although OCS does contain some teaming support (through its Workspaces services), we have not encountered any customers who use it for this purpose, nor can Oracle provide any references. Despite the presence of Oracle Workspaces, Oracle does not position OCS for teaming and collaboration. Therefore, we don’t expect to see any future enhancements in this respect. Indeed, the future of OCS remains cloudy, with no clear road map available, even though the current release is over two years old. Some teaming and social software capabilities are available as part of Oracle WebCenter Suite (a component of Oracle Fusion Middleware) released in early 2007. However, it would be premature to include these capabilities in our assessment as there are not enough production deployments to date.
- **Sun** offers wikis, discussion, file sharing and search as part of the broader capabilities of its Sun Java System Portal Server. Although the collaboration and social software capabilities are limited, it could offer “good enough” functionality in the context of a broader portal deployment. However, we did not include it in this Magic Quadrant because its primary use is as a portal, and it is unlikely that it will be deployed specifically for collaboration support. Apart from collaboration support in the Portal server, Sun is also adding collaboration and social software components, such as a blog server (based on Apache Roller), to the Updatecenter application repository and distribution service for the Glassfish platform.

Market Definition/Description

We define the team collaboration and social software market as consisting of products that are used primarily for teaming, communities and social networking. The buyers in this market are looking for persistent and structured virtual environments, in which participants can create, organize and share information, as well as interact with each other.

The business uses of these products vary in terms of degree of formality and openness – from team information sharing and project coordination among a small, homogeneous group within an enterprise; to sharing best practices within a business unit; to encouraging socialization and knowledge transfer among employees or even external participants in a partner or customer network.

In particular, team collaboration and social software products are being used to:

- Share team information and coordinate project-related activities by adding permanence and structure to ad hoc communications.
- Empower communities of experts and interested parties (bonding people by specific interests, capturing best practices, disseminating lead-user innovation and providing an informal support network).
- Facilitate social interaction by helping people to establish and strengthen personal relationships, develop trust, and, in the end, to reduce friction and accelerate the business processes that people are engaged in.

The tools provided by vendors in this market are generally deployed internally and managed by IT departments or service partners, although an increasing number of vendors make their products available via SaaS and, in some cases, as managed appliances.

Inclusion and Exclusion Criteria

Inclusion in this Magic Quadrant is based on an assessment of the market presence and functional capabilities of products that are generally available in this market as follows:

- Products that are packaged and sold independently (that is, not offered as part of a bigger suite or offering) and whose primary use is for collaboration and social interaction support, as described in the market definition above.
- There are at least 10 customers using production releases, with at least 500 active user deployments each.
- It is a product that must offer the following required baseline functionality: membership management, access controls, user profiles, shared workspaces, document sharing and discussion forums.

Low Baseline but High Expectations of Additional Optional Functionality

For this version of the Magic Quadrant we did not insist on any specific coordination or social software functionality, as there is not yet a clear consensus on what should be included. However we do expect to see at least some of the following optional functionality and, indeed, we have given better scores to products with more complete functionality in the following areas (see also the Product/Service comments in the section on Evaluation Criteria):

Calendar integration, task allocation, task tracking, workflow, basic project management, wikis, blogs, social tags, social bookmarks, social network analysis, social network visualization, content feeds,

people search (expertise location), team decision support (voting, sorting, ranking, scenario planning and categorizing), content rating, reputation management and alerting.

In future versions of this Magic Quadrant some of the above functionality will become required, to reflect the market conditions at the time.

Also, we did not insist on bundled, native messaging and communications functionality. However, we did give a higher rating to any products that integrate well with the following services (see also the Offering [Product] Strategy comments in the section on Evaluation Criteria):

E-mail, instant messaging, presence, Web conferencing and IP telephony.

Note that although we look for evidence of market presence (10 customers with 500 users each in production) in order to exclude some of the very small vendors, we deliberately do not have an explicit test for minimum revenue. This has meant that the Magic Quadrant includes products from less-established vendors, from vendors experimenting with new pricing models, and open-source products. This helps to reflect some of the innovation and alternative sourcing options available in this market. However, although the size, revenues and profitability of the vendors was taken into account when assessing their ability to execute, you should be aware that some of the vendors here represent more risk than those in Magic Quadrants with a high revenue threshold.

Added

This is the first iteration of this Magic Quadrant, so no vendors were added.

Dropped

This is the first iteration of this Magic Quadrant, so no vendors were dropped.

Evaluation Criteria

Ability to Execute

Product/Service: The overall vendor product/service functionality rating is developed by evaluating specific functionality that is already available and, in particular, the extent to which the product goes beyond the baseline functionality required for inclusion. Some of the functionality we are looking for includes social network analysis, blogs, wikis, wiki spreadsheets, social tagging, social bookmarking, social search, general analytics, expertise location, group formation based on common interests, content/people ratings, alerting mechanism, and so on. Also, as part of the overall score, we took into account the maturity of the product (the number of versions released and how long it has been available), and any evidence of large-scale deployments of over 1,000 users.

Overall Viability (Business Unit, Financial, Strategy, Organization)

Key aspects of this criterion are the vendor's financial health, including funding, who is investing in and backing their activities, profitability, overall size of the collaboration and social software business (in particular, dedicated employee numbers), and the degree to which the organization is committed to this part of its business.

Sales Execution/Pricing: This describes the vendor's ability to sell to large organizations, its price transparency and straightforward sales process, and consistent revenue growth over the last 12 to 24 months.

Market Responsiveness and Track Record: This refers to a vendor's ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. Specifically, we look at evidence of this in the history of the product (acquisitions, development and updates, for example) and in actions and comments of the product management team.

Table 1. Ability to Execute Evaluation Criteria

Evaluation Criteria	Weighting
Product/Service	high
Overall Viability (Business Unit, Financial, Strategy, Organization)	high
Sales Execution/Pricing	standard
Market Responsiveness and Track Record	low
Marketing Execution	standard
Customer Experience	standard
Operations	standard
Source: Gartner	

Marketing Execution: We looked for evidence of mind share, thought leadership and brand recognition, and for any specific marketing initiatives (white papers, events, microsites) that may have helped to promote them. One particularly effective approach is for senior executives to be active participants in ongoing online conversations via their blogs or comments. We also took into account the size of the marketing organization.

Customer Experience: We looked for customer feedback from vendor-supplied references, Gartner inquiries and other customer-facing interactions, such as Gartner conferences. Customer experiences are rated based on the vendor's ability to help customers achieve positive business value, as well as sustained user adoption, and quality implementation and ongoing support. We also took into account the percentage of users still under maintenance, the mix of customers (large as well as smaller organizations), overall customer numbers, and evidence of outstanding customer successes.

Operations: Factors include the quality of the organizational structure – skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis. We also looked at technology and service partners, training and certification programs, research and development resources, the presence of any independent activities adding value to the core product (for example, open-source add-on modules), the size of the support organization and the presence of active customer communities for peer support, for input into R&D.

Completeness of Vision

Market Understanding: The vendor needs to demonstrate a strategic understanding of collaboration and social software opportunities, such as an understanding of the business value of social interaction support, the complementarity of related capabilities (content, portal, communications services), an urgency to pre-integrate them, a tolerance and acknowledgement of other existing but related technologies from other vendors, and an overall vision of the space that focuses more on supporting people-centric activities and less on a formal process-centric view of collaboration.

Marketing Strategy: The degree to which the vendor's marketing approach aligns with (and/or leverages) emerging trends and the overall direction of the market. In particular, we looked at the "use cases" promoted in the vendors' marketing messages, their online activities and any programs for educating and priming the market around social interaction support (for example, "try before you buy," open-source versions and hosted versions).

Sales Strategy: We looked at the level of channel activity, any strategy for converting large numbers of early adopters to high-end or broader deployments, and the opportunity to convert existing customers to products with new or additional capabilities. **Offering (Product) Strategy:** This is the degree to which the vendor's product road map reflects demand trends and opportunities to create demand in the market and fill current gaps or weaknesses. We also looked at interoperability with communication services (e-mail, instant messaging, presence, Web conferencing and IP telephony), mobile support, the neutrality of infrastructure dependencies (OS, directory and security), and the alignment with related products from the same

or other vendors (specifically for content management, portal functionality and search).

Business Model: We looked at the levels of investment needed to achieve profitability and revenue growth, the balance of service and license revenues, evidence of success with repeatable revenue (subscription licensing, for example), and low-cost distribution, development and support (for example, using open-source licensing).

Vertical/Industry Strategy: The level of emphasis the vendor places on vertical solutions, and the vendor's depth of vertical expertise.

Innovation: the degree to which the vendor is investing in R&D directed toward development of the tools, and the extent to which the vendor demonstrates "creative energy." Examples include: a commitment to new browser-based client technologies (in particular, Ajax), Web native formats and any work on microformats; adoption of not just a service-oriented architecture, but one with a strong Web-oriented architecture flavor; offline support; movement toward full access to internal data via representational state transfer (REST) interfaces and XML data streams; fine-grain content syndication and alerting via Atom/Really Simple Syndication (RSS); and the use of open source to fill gaps in the product or to evolve the product itself.

Geographic Strategy: We examined the vendor's strategy to direct resources, skills and offerings to meet the specific needs of regions outside the corporate headquarters' location, directly or through partners, channels and subsidiaries, as appropriate for that geography and market.

Table 2. Completeness of Vision Evaluation Criteria

Evaluation Criteria	Weighting
Market Understanding	standard
Marketing Strategy	standard
Sales Strategy	standard
Offering (Product) Strategy	high
Business Model	low
Vertical/Industry Strategy	low
Innovation	high
Geographic Strategy	low
Source: Gartner	

Leaders

There are no Leaders in this Magic Quadrant. Although about half the vendors rated here are well established with widely used collaboration offerings, some are still trying to catch up, while others are struggling to remain relevant in a fast changing marketplace. The new offerings from established vendors are still relatively immature, suffer from functionality gaps, and are not as well integrated with related products or with those of other vendors. Smaller new vendors that have been getting some traction with products focusing on flexible collaboration and social interaction are still too small to be rated high enough in terms of execution to be placed in the Leaders quadrant.

Challengers

Vendors in the Challengers quadrant offer solutions that are poised to move into leadership but have not yet done so. They have strong products but may not have the same functional breadth, marketing strategy or rate of innovation as those in the Visionaries quadrant. Challengers do have an established presence, credibility and viability, and once their products move beyond a good enough baseline they will likely leverage their existing customer base to leapfrog others into the Leaders quadrant at some point in the future.

Visionaries

Visionaries in the market demonstrate a strong understanding of current and future market trends and directions, such as the importance of a flexible and transparent collaboration environment, as well as the value of mutual reinforcement between tools that encourage user contribution and tools that encourage bottom-up group and structure formation. Their products display a number of innovative capabilities, especially in terms of architecture and lightweight integration, while their marketing and R&D efforts are boosted by their alignment with the open-source “ecosystem.” The Visionaries in this market have not exhibited the scope of delivery of the Challengers, but have demonstrated vision across a range of capabilities.

Niche Players

Niche Players form the bulk of the vendors in this Magic Quadrant. Most understand the changing market dynamics and are working toward similar product capabilities. However, they are still held back by functionality, the urgency they place on their road maps and plans, or by lack of innovation. Many of the smaller vendors may enjoy success relative to their size, but need to exploit the current 12 to 24 month window of opportunity to grow and establish their positions before their competitive differentiation begins to erode. An alternative strategy for a minority of smaller vendors is to specialize in some niche markets, such as customer communities or externally facing social networks. These vendors are unlikely to break out of the Niche Players quadrant even though they may continue to have a long-term viable business. For some of the larger established vendors, collaboration support is peripheral to their core product and service portfolio, and their efforts are more focused on servicing the specialist needs of their core market (for example document-centric collaboration for content management vendors).

Vendor Strengths and Cautions

Atlassian Strengths

- Atlassian offers a well known and popular wiki-centric product (Confluence 2.5.4), often used in combination with an associated issue tracking product (Jira) for supporting and documenting collaborative application development.
- It has an uncomplicated sales process with low server-based pricing and a “try-before-you-buy” option.
- Enterprise acceptance is widespread, with high-end clustered deployments.
- It uses open-source components as part of the core product and the runtime environment, and makes the source code available for inspection.
- The Java-based infrastructure supports several runtime engines and databases.
- Atlassian has active customer communities.

Cautions

- The product has functional weaknesses both in social interaction support (it lacks dynamic user profiles, social networking, social tagging/bookmarking, social search and expertise location) and in supporting more structured work (such as tasks, project management and workflow).
- There is less focus on the broader collaboration market and Confluence's position in relation to other established products.
- Despite rapid growth (106 employees at the time of writing), this is still a small organization with limited geographic presence growing out of its Australian base.

Awareness Strengths

- Awareness (formerly known as iUpload) has a good track record among large organizations, using its product for customer communities, extranet collaboration and, to a lesser extent, for internal deployments (to support communities of interest, for example).
- We had positive customer feedback on the accompanying services for setting up and running communities, from which Awareness derives about 30% of its revenue.
- The company offers near-complete functionality with just a few gaps in structured collaboration support and social network analysis.
- The product has an innovative ability to capture content and then repurpose it as a wiki, blog, forum post or calendar entry (content repurposing and content transformation).
- There is some integration with other workplace applications, primarily via embeddable HTML and portlets.

Cautions

- Hosted-only availability will limit its appeal.
- There is limited ability to execute (due to its small size, with about 25 employees, and no significant activities outside the U.S.).

blueKiwi

Strengths

- blueKiwi gained early traction, with large European organizations reporting successes with a product focusing on blogging and social networks.
- Expanding functionality allows the ability to add wikis, bookmarking, self-service communities and social networking capabilities.
- The company has geographic advantage in European, and especially French-speaking, countries.

Cautions

- blueKiwi is a small company with about 20 employees, limited resources, a short track record (it was founded in 2006) and no activity outside Europe.
- Its architecture is still evolving, with SOAP and REST support still in development.
- The company is weak in supporting structured collaboration.

BEA

Strengths

- Aqualogic Collaboration is already an established collaboration product. The recent additions of Ensemble (an infrastructure system mainly handling security, usage tracking and widget serving for Web resources), Pages (a wiki-style application creation/editing tool for business users to interact with text as well as with structured information, such as data sets, lists, images, maps or tables) and Pathways (mainly a tagging, social bookmarking and social search tool) demonstrate market awareness, innovation and responsiveness.
- There has been early delivery of social search and social interaction support (or as the company describes it, "harvesting implicit user activities to improve discovery and connections"), and in empowering end users with tools for composite and "situational" applications.
- There is good awareness of enterprise requirements, scale of operations and geographic presence.

Cautions

- New capabilities (Ensemble, Pages and Pathways) are unproven, as they only became available in July 2007.
- The initial releases of the new products require the Aqualogic Interaction portal, which may limit their appeal to those already committed to the portal until stand-alone releases are made available (planned for early 2008).
- Enterprise pricing will deter early adopters to move beyond experimentation with trial versions.
- Social computing has become an important part of the overall BEA strategy, but it is not yet an area that BEA is well known for.

Communispace

Strengths

- Communispace has carved a successful niche in private, branded business-to-consumer (B2C) and business-to-business (B2B) communities.

- It has good track record among large organizations, using private customer communities for insight and feedback to generate new product and service ideas, for peer information exchange, and generally to "connect" and converse with customers. Often, it is used as an alternative to customer surveys and focus groups.
- The full-service solution offers clients extensive community strategy consulting and community facilitation, with about 100 out of its 150 employees engaged in facilitation and analysis.
- It is able to handle multimedia content (video, slideshows and so on) and provides useful participation measurement and analysis.

Cautions

- A hosted offering is ideal for its target use case of external communities, though it may hinder its ability to expand beyond that.
- There is limited functionality beyond what is needed for its core business (no wikis, no blogs, no shared bookmarks, no structured collaboration, and no self-service communities), and R&D resources are also limited.
- An emphasis is put on community services rather than on packaged software.
- There continue to be architecture flexibility issues, with limited application programming interface (API) access and the use of dynamic addressing that prevents content or other assets from being bookmarked.

CustomerVision

Strengths

- The company has witnessed some success, with customers deploying CustomerVision BizWiki for training and learning.
- Near-complete functionality is offered, including wikis, blogs, content rating, expertise location and tagging (but no tag analysis or social search).
- A good mix of customers use the product both for internal and external collaboration.
- The product is availability as a hosted service or on-premises installation (but with subscription licensing in both cases).

Cautions

- CustomerVision has limited market presence, is very small in size (15 employees) and has a limited ecosystem.
- It also has limited architecture flexibility (no Web services, no support for REST or other APIs).

EMC

Strengths

- EMC's Documentum eRoom is one of the earliest and most successful enterprise collaboration environments – both for internal workgroups as well as for extranet deployments.
- It has seen good traction for document-centric structured collaboration use cases, such as client engagements, proposal development, new product development, product life cycle management and issues management.

- It is aligned with the ECM offering (the current version includes a Documentum repository and the next, version 7.4, will include information rights management technology).

Cautions

- EMC has a document- and process-centric view of collaboration, with little support for informal communities and no plans to support social interactions.
- The company has very long product cycles.

GroveSite Strengths

- GroveSite has found a niche in easily customizable workspaces that blend wiki-style text information with more structured file and data exchange.
- It has a growing user base consisting mainly of organizations that use GroveSite to collaborate with their vendors, clients and other stakeholders.
- The customer-focused organization has received very positive feedback from customers.
- It makes innovative use of “data tables” to create online Web-native databases for structured data.

Cautions

- Functionality is good enough for target use cases, but there are gaps in tagging, bookmarking, alerting and content aggregation (via Atom/RSS, self-service communities and blogs).
- The hosted-only delivery model may prove a problem if there is a desire to expand beyond the current target market.
- The architectural flexibility with Web services and REST support is still under development.
- The company's small size (15 employees) limits its ability to execute.

IBM Strengths

- The IBM Lotus Connections offering released in June 2007 offers near-complete functionality that includes social tagging, an innovative approach to activity-centered collaboration, blogs, people profiles and expertise location.
- There was evidence of early customer traction even before the first production release.
- This offering showcases IBM's commitment to social computing and, in particular, the innovative work of IBM's Collaborative User Experience Research group.
- It offers very flexible deployment options as independent modules: as the Lotus Connections Suite; as part of a bundle that adds Quickr (primarily for content management) and Sametime (for communications); or as a set of services accessible via the Lotus Notes 8 client or the WebSphere portal with which Lotus Connections is closely aligned. These options make it possible to attract both new and existing IBM customers.
- IBM's market presence as a dependable global vendor means it's able to handle enterprise requirements.

Cautions

- Some functionality gaps remain (in particular, social network analysis, improved community support and, most importantly, a pre-integrated wiki).
- Some of Connections' components have existed for a while as independent products, but some components are relatively unproven. It could benefit from improvements in its look and feel, as well as the addition of numerous lesser features, such as drag-and-drop or sophisticated text editing.
- The lack of a consumer Web offering limits IBM's visibility to this important segment that influences broad adoption of social software. Also, a lack of easy access to hosted, trial or open-source versions beyond what is available at Lotus Greenhouse (greenhouse.lotus.com) discourages experimentation by early adopters.
- Whether justified or not, perceptions of complexity and dependencies on other IBM products such as Domino, WebSphere or DB2 will make it more difficult for IBM to reach customers outside its existing customer base.

Jive Software Strengths

- Jive has some traction in the collaboration market, with related VoIP and instant messaging products.
- Clearspace is a near-complete collaboration and social software suite combining blogs, wikis, forums, tags, spaces, file management, RSS, rich media types, e-mail integration, search, profiles, presence, chat and notification.
- The company has a growing partner and channel ecosystem.
- It leverages several open-source components (for search, basic workflow, PDF rendering, XML processing and embedded database) and makes the source code available for inspection.

Cautions

- Some functionality gaps remain around social bookmarking, self-service communities, better support for structured collaboration and social network analysis.
- Jive is a relatively small organization (65 people) that needs to manage growth carefully.

Leverage Software Strengths

- Leverage Software has market presence in customer, partner, developer, service, hospitality and other externally facing communities.
- It is one of very few vendors offering social network analysis to identify “friends” and social search, in addition to a broad range of collaboration and social software capabilities.
- It has a growing channel ecosystem, including partnerships with AppExchange and WebexConnect.

Cautions

- Leverage has functional gaps in structured collaboration, social bookmarking, wikis, Atom/RSS alerting and syndication, and a lack of template support.

- Web services and REST APIs make SaaS-only delivery more accessible, but may not be enough for organizations which prefer on-premises deployments.
- Leverage is a small organization (20 employees), with activities mainly in the U.S. and a limited ecosystem.

Microsoft Strengths

- Microsoft has a broad set of capabilities that combine structured collaboration; some social computing capabilities, including a “people search” that uses social network analysis; and related content, portal and workflow capabilities. This is all provided on a platform that offers consistent management and administration.
- It has seen exceptional market penetration, momentum and satisfaction around Windows SharePoint Services (a component included in Windows server) and Microsoft Office SharePoint Server 2007 (MOSS 2007).
- Alignment with desktop office applications generates end-user demand for SharePoint services.
- There is also alignment with related collaboration offerings and, in particular, Microsoft’s unified communications suite.
- Microsoft’s market presence as a dependable global vendor enables it to handle enterprise requirements.

Cautions

- Given its breadth, MOSS may deter those who are looking to take advantage only of the collaboration and social networking capabilities, and those not fully committed to Microsoft infrastructure services.
- There are functional gaps which Microsoft is unlikely to be able to address fully before the next release of SharePoint. These gaps include social tagging and bookmarking, social search and an improved wiki.
- While it is also possible to work directly with Web-native formats, SharePoint encourages collaboration around Office documents which it stores and routes, and makes collaboration less transparent and information harder to reuse.

MindTouch Strengths

- Deki Wiki is a relatively recent open-source product, but is growing fast in popularity as indicated by repository activity and downloads (around 40,000 in August 2007).
- The product is fully open source (originally based on the MediaWiki code) with a range of enhancements, including a rich text editor, a Windows desktop connector for drag-and-drop, document attachments with in-browser viewing, and integration with graphing and mind-map engines.
- It has a flexible architecture with extensive REST APIs supporting XML/JSON/PHP for client and server-side integration, which make it possible to add wiki functionality to other applications, to add permalinks, to embed external widgets (from Google, Yahoo or Flickr, for example), or to mix external data with MindTouch content (mashups).

- It has a growing partner and developer ecosystem including Novell and Microsoft, as well as large numbers of active external developers.

Cautions

- MindTouch is a small and young organization (12 employees) that has yet to prove its ability to serve enterprises.
- The core engine is built on Microsoft .NET but can be deployed on platforms other than Microsoft Windows using the open source Mono implementation of .NET (developed by Novell).

Open Text Strengths

- Livelink ECM Collaboration includes good-enough functionality for community self-service, discussions, and basic blogs and wikis. It is stronger in supporting internal deployments for structured collaboration that requires task management, workflow, calendar integration and basic project management.
- Open Text’s collaboration offering is aligned with a very broad range of related offerings for content and document management, real-time collaboration and, in particular, integration with RedDot XCMS and RedDot Liveserver, which can be used to deliver Livelink content to external communities.
- Open Text has an enterprise focus with vertical differentiation, and a broad geographic presence.

Cautions

- Some functionality gaps will be addressed in the next version (social network analysis, social tagging and improved Atom/RSS support) as well as through deeper integration with RedDot XCMS and RedDot Liveserver.
- The collaboration market is not the main focus of Open Text, and it therefore receives less attention as an independent market.
- The separation of some functionality into different modules (for example, Livelink ECM – Communities of Practice, or Livelink ECM – Knowledge Management) may complicate procurement and deployment, although it is possible to blend functionality from different modules into a custom package.

OutStart Strengths

- OutStart Participate has some traction with knowledge repositories, discussions and expertise location either in the context of team collaboration, knowledge management and community support, or as part of training and sales and marketing process support.
- It offers flexible deployment options as independent modules, or as part of the Participate platform, which includes related modules for sales support and e-learning. It is available as a hosted service or via on-premises installation with a perpetual license, or subscription.

Cautions

- Collaboration support is an important and growing part of the business, but not the main revenue source of this relatively small organization (110 employees).
- There are functionality gaps if the product is used beyond its main use cases (limited wiki, no social tagging and no bookmarking analysis).

Ramius

Strengths

- The company's focus is on supporting collaboration between internal and external users, with particular traction in channel extranets.
- It has a proven and mature functionality, including profiles, e-mail integration, content authoring and moderation, search, syndication and threaded discussions, which are tuned for easy setup of partner networks and customer communities.

Cautions

- The current technology architecture and functionality requires a refresh. The next version is promising, but will not be available until 2008.
- Ramius has limited market visibility.
- It is a relatively small organization (30 employees) that needs to exploit its longer experience in the collaboration market for faster growth.

SiteScape

Strengths

- SiteScape is an established collaboration player best known for SiteScape Forum. A new collaboration suite with open source ICEcore and ICEcore Enterprise products is expected in 4Q07.
- The new suite will combine structured collaboration and more flexible support for communities and social interaction.
- It will leverage open-source components to fill product gaps as well as an open-source license (CPAL) to attract early users and developers.
- An OEM agreement with Novell adds credibility to its plans.
- ICEcore's team collaboration and social software capabilities can be deployed with or without the communications capabilities (Web conferencing, presence, telephony integration and content management).

Cautions

- SiteScape Forum is a mature but incomplete product, while ICEcore is unproven.
- A migration toolkit can move content and data from SiteScape Forum to ICEcore, but any custom Tcl (a scripting language, originally from "Tool Command Language") code will need to be ported manually.
- SiteScape has an embryonic ecosystem of users, developers and service providers around its open-source product.

Six Apart

Strengths

- MovableType is already a powerful and popular blogging platform. The current release, from August 2007, added publishing, user management capabilities and social search features (via a "community edition").
- An open-source release of the product by the end of 2007 will likely help to increase its appeal and market penetration.
- Six Apart has general visibility and mind share, but is also among large enterprises who already use it for corporate blogging.
- It has a growing number of partners, including a reseller and consulting network with operations outside the United States.
- Six Apart is a social software innovator with a best-of-breed blogging product, is the developer of an open-source caching server used by high traffic Web sites such as Facebook and Wikipedia, and is originator of the OpenID authentication protocol and the MT API for offline blog authoring supported by many clients.

Cautions

- Six Apart's main focus is not the enterprise, where it has little track record beyond blogging services and technology.
- PERL-based product may deter some who are not familiar with the language and platform.
- Carving up functionality into different editions and differentiating between the open-source and enterprise versions may impact acceptance and complicate the sales process.

Social Platform

Strengths

- Social Platform has gained some traction as a hosted "white label" social software platform supporting multiple, high-volume, external and consumer-oriented communities with evidence of very large deployments (1 million users).
- The product is relatively low cost, benefiting from an open-source Linux, Apache, MySQL and PHP (LAMP) framework.
- The company has some innovative ideas about social networking platform interoperability and transferable identities.
- It is one of the few products that supports social network analysis and social search.

Cautions

- The product is more suited for external customer or consumer social networks rather than internal collaboration support.
- Social Platform is a very small organization (12 employees).

Socialtext

Strengths

- Socialtext was one of the first commercial wiki organizations. It has a sizeable customer base and mind share, and there is evidence of large-scale deployments of the product.

- Apart from near-complete functionality (social bookmarking, social search, social network analysis and expertise location being the most significant gaps), there are several innovative capabilities, including a wiki spreadsheet, a more limited mobile version, a sophisticated wiki editor with widget support, some offline capabilities and SharePoint integration.
- It has active customer communities and partnerships, including one with SuiteTwo.
- OSI's recent approval of the Socialtext Open Source License (CPAL) is good news for Socialtext.

Cautions

- Socialtext's is an open architecture with granular Atom/RSS support, full REST APIs and a PERL-based product, which may deter some who are not familiar with the language and platform.
- The decision to differentiate between the open-source and the commercial version will damage the attractiveness of the open-source version.
- Socialtext needs to prove that it can handle growth.

SuiteTwo Strengths

- SuiteTwo has an innovative pre-integration approach to building the most comprehensive collaboration and social software suite (see "Intel-Led Social Software Effort Bids for Enterprise Attention"). It could establish a logical path from best-of-breed components to enterprisewide suites. And it may serve as a model for a lightweight Web 2.0 integration platform between existing heterogeneous workplace applications.
- Best-of-breed capabilities are supplied by different vendors, including a blog (from Six Apart), a wiki (from Socialtext), feed aggregation/publishing (from NewsGator) and social network analysis (from Visible Path). Related capabilities are also being integrated: currently including content management (from Alfresco), social bookmarking (from ConnectBeam) and Content Security (from Clearswift).
- SpikeSource provides technical innovation with a common API, a common user interface (UI), common single sign-on, search capabilities, "folksonomy tag clouds" (user-generated metadata), automated updates and unified administration services.
- Intel adds global distribution capabilities via its OEMs (Dell and NEC), and it has a strong presence in the small and midsize business (SMB) market through its extensive network of value-added resellers (VARs).

Cautions

- The suite is relatively new and there is not a lot of evidence of high-end use of the complete suite. So far most deployments are for individual components.
- The stability of the vendor alliance has yet to be tested. Although added value through cooperation is a given for now, this could change as each vendor adds capabilities that encroach into those of others.

- Intel's lack of track record and experience in the collaboration market may impact user acceptance.
- Pricing the suite may become problematic when trying to avoid undercutting individual components without inflating the cost of the complete suite.

Telligent Strengths

- Telligent has had relative success with externally focused customer community sites offering forums, blogs, feeds, tagging and so on. It has particularly good moderation and filtering support for open communities.
- There is evidence of very large open community deployments.

Cautions

- Although very good in general community support, there are functional gaps in social network analysis, wikis, social search and support for more structured collaboration (such as tasks, simple workflow and projects).
- Telligent needs to keep its focus on the needs of high-end community support if it is to avoid falling into a commodity niche.

Traction Software Strengths

- Innovative capabilities including a what you see is what you get (WYSIWYG) wiki editor with widget support; rich media support; the ability to generate complete PDF/Word documents (with tables of contents, cross references and appendices) from collections of wiki pages; document attachment and versioning; content repurposing; and tag-based content exploration with dynamic views.
- It is based on a Java platform with no third-party dependencies, which leverages open-source components.
- Traction has partnerships with Fast Search and Transfer for search and content navigation and expertise location, and with QL2 Software for competitive intelligence (monitoring and reporting changes in Web sites, news feeds and databases).

Cautions

- Early successes with high-end customers resulted in some sophisticated high-end capabilities, but more needs to be done in terms of usability in order to broaden its appeal.
- There are functionality gaps in dynamic user profiles and social network analysis.
- Traction is a very small organization (seven employees) that needs to grow if it is not to be left behind.

TWiki Strengths

- TWiki offers a popular open-source wiki-centric product reporting 10,000 downloads per month with a number of successful customer deployments.

- It has broad functionality (gaps in social network analysis, social bookmarking and social search).
- It offers a growing number of plugins (currently 200+) that add task management, calendar integration, online spreadsheets, tag clouds, blogs, discussions and so on, plus a general mechanism for input and presentation of structured content (WikiForms).
- TWiki has a large, active development and user community with a good track record in peer support.
- Commercial support comes from Twiki.net, as well as from independent consultant organizations. A supported "certified TWiki" version is expected before the end of 2007 (currently in beta).
- No licensing fees are levied for the full version or for plugins.

Cautions

- Commercial support is available but limited. Until that evolves, users should supplement it with internal resources and ties to the TWiki community.
- The quality of the available plugins is variable. Users must conduct their own assessment of plugins beyond what will be available as part of the certified version.

Vignette Strengths

- Vignette Collaboration provides a new focus on "user-generated content," with version 7.1 already supporting blogs, wikis, RSS, discussions and community support.

Vendors Added or Dropped

We review and adjust our inclusion criteria for Magic Quadrants and MarketScopes as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant or MarketScope may change over time. A vendor appearing in a Magic Quadrant or MarketScope one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. This may be a reflection of a change in the market and, therefore, changed evaluation criteria, or a change of focus by a vendor.

- It is a relatively large organization with an enterprise focus, broad geographical presence and vertical differentiation.
- It is based on a flexible Java-based architecture, leveraging open-source components, and has been pre-integrated with other communication services.

Cautions

- Important functionality is not yet available (tags, bookmarks, analytics, social search and improved moderation – though these are planned for the next release).
- The Java-based Ephox editor may limit the wiki appeal.
- Collaboration has not been Vignette's main focus, although it is an important ingredient of its support for the "next-generation Web."
- There is a lack of collaboration, market visibility and mind share.

Evaluation Criteria Definitions

Ability to Execute

Product/Service: Core goods and services offered by the vendor that compete in/serve the defined market. This includes current product/service capabilities, quality, feature sets and skills, whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.

Overall Viability (Business Unit, Financial, Strategy, Organization): Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood of the individual business unit to continue investing in the product, to continue offering the product and to advance the state of the art within the organization's portfolio of products.

Sales Execution/Pricing: The vendor's capabilities in all pre-sales activities and the structure that supports them. This includes deal management, pricing and negotiation, pre-sales support and the overall effectiveness of the sales channel.

Market Responsiveness and Track Record: Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the vendor's history of responsiveness.

Marketing Execution: The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message in order to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This "mind share" can be driven by a combination of publicity, promotional, thought leadership, word-of-mouth and sales activities.

Customer Experience: Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways customers receive technical support or account support. This can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups and service-level agreements.

Operations: The ability of the organization to meet its goals and commitments. Factors include the quality of the organizational structure including skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis.

Completeness of Vision

Market Understanding: Ability of the vendor to understand buyers' wants and needs and to translate those into products and services. Vendors that show the highest degree of vision listen and understand buyers' wants and needs, and can shape or enhance those with their added vision.

Marketing Strategy: A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the Web site, advertising, customer programs and positioning statements.

Sales Strategy: The strategy for selling product that uses the appropriate network of direct and indirect sales, marketing, service and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base.

Offering (Product) Strategy: The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature set as they map to current and future requirements.

Business Model: The soundness and logic of the vendor's underlying business proposition.

Vertical/Industry Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments, including verticals.

Innovation: Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes.

Geographic Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries as appropriate for that geography and market.