

Magic Quadrant for Social Software in the Workplace

Gartner RAS Core Research Note G00171792, Nikos Drakos, Carol Rozwell, Anthony Bradley, Jeffrey Mann,
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A tighter focus on the social software products used primarily by internal employees brings into sharp contrast the strategies and choices pursued by established large vendors and smaller specialist ones.

WHAT YOU NEED TO KNOW

This document was revised on 24 November 2009. For more information, see the [Corrections](#) page on gartner.com.

The social software market is not a homogeneous one. Buyers are evaluating products that will be deployed internally for employees differently from those aimed at external participants. In this 2009 assessment we focus on the market segment that contains products targeted at or employed primarily for use in the workplace. This change will effectively narrow the scope of the Magic Quadrant to match the kinds of products that our clients actually consider when looking to buy in this market. The tighter focus on the social software products used mainly by internal employees brings into sharp contrast the strategies and choices pursued by established large vendors and smaller specialist ones. Established workplace vendors with communication, portal, content or general collaboration platform offerings have continued to invest in social media support, and they are gaining market traction. Specialist vendors directly target social media prowess, so are enhancing product functionality, moving toward solution selling that appeals to non-IT buyers, and innovating with viral adoption techniques both within and between user organizations. Being smaller with a specialist focus rather than broader “ecosystem” players, they are struggling to demonstrate enterprise credibility and long-term viability through partnerships, alliances, integration options and examples of customer success. Products from specialist vendors continue to be preferred for first and follow-on deployments, but many smaller vendors are struggling to close large enterprisewide deals. Product selection should be driven by specific requirements: product capabilities, risk tolerance and the timeline dictated by the relevant business opportunity. The social software market is still maturing and only a handful of vendors earned more than \$10 million in revenue from products in this market. There are no “safe bets” yet. Established vendors need to build up their products, while specialist vendors need to build up their reputation.

MAGIC QUADRANT

Market Overview

Moderate growth, continued innovation and further steps toward maturity characterize the social software market.

Established Vendors Are Expanding Their Products and Sharpening Their Marketing Messages

EMC's Documentum CenterStage, a new release of IBM Lotus Connections, Social Media add-ons for Open Text's collaboration product, and renewed emphasis on the My Sites functionality in Microsoft's SharePoint are all examples of this trend. Irrespective of whether supporting social interaction is really central to the long-term strategies of these vendors, it is clear that they all recognize it as a growth area that represents a natural part of their product portfolio. Many customers that are already committed to these vendors are also beginning to accept their products and are at least delaying broad internal deployments.

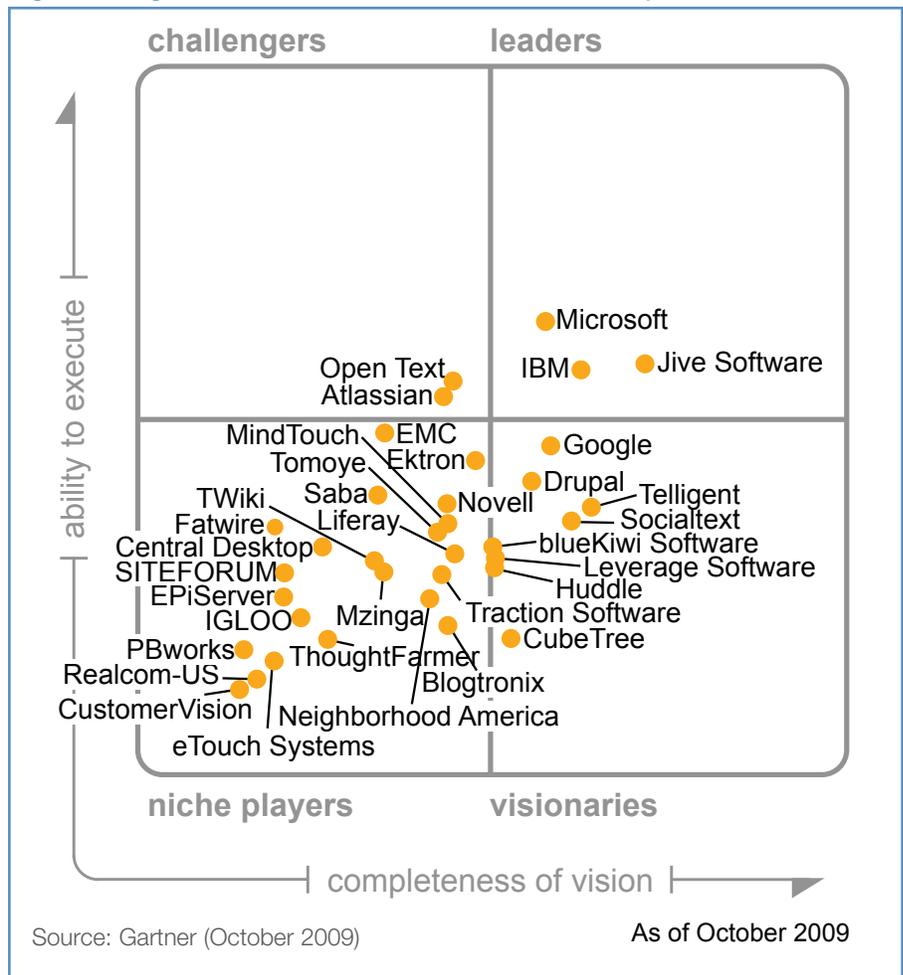
Functionality Combinations Are Still not Settled

Although all the vendors in this Magic Quadrant have suite-like products with a broad, core set of capabilities (otherwise they would not have been included), there are noticeable differences beyond this core. Bundled or pre-integrated support for real-time messaging and conferencing, document management, workflow and business process modeling, as well as specific business process support, continue to blur the boundaries between social software products and other workplace technology. Smaller vendors are addressing this potential weakness in their offerings using a number of approaches: partnerships; embedding third-party products; application or portal integration; open application programming interfaces (APIs) and bidirectional widget support; in some cases by positioning their products as add-ons to more established offerings; and by promoting solution-specific packages that can appeal to business buyers with specific problems.

Growing, but not Very Fast

Overall, the last 12 months have not been a period of high growth. This is hardly surprising, of course, given the difficult economic climate during this period. While this adds to the general market pressures felt by vendors in this market, we also expect that vendor diversity will persist. New vendors are still appearing in the market (CubeTree, for example), while several other vendors have received

Figure 1. Magic Quadrant for Social Software in the Workplace



additional funding. Most vendors are also finding other cost-effective ways to stay relevant and in the market – for example, by embedding open-source components, by using cloud computing infrastructure services, or by keeping their marketing, sales and support costs down through their online presence and software as a service (SaaS)-only deployment options.

Companies Are Struggling to Balance Risk and Business Value

Among Gartner clients, the level of awareness of the business value of social software is high. Most organizations already have experience with initial deployments and many of their employees have personal experience of similar consumer services. Such

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trials, experiments and pilots have convinced many that there is value in social software deployment, mainly in terms of improving “connectedness” in their organizations (making it easier to find, approach, understand and connect with others), or in terms of capturing and organizing valuable formal and informal knowledge. However, despite evidence of a positive impact on specific business activities, it is still difficult to establish a reliable aggregate measure of business value that could justify large-scale, enterprisewide investments. Apart from difficulties in building a general business case, many organizations are finding it hard to align existing practices, and more generally their organizational culture, with the end-user empowerment promised by social software environments. One specific aspect of this misalignment is the certainty of increased risk, which is often pointed out by compliance officers, security professionals and enterprise information architects. Attempts to broaden modestly successful early deployments are shelved because of culture misalignment often expressed as security or information architecture risk. Such stalemates can only be broken with clearly articulated, specific arguments pointing to business value and strong business leadership, to champion culture-changing deployments where necessary.

Notable Absences

Some vendors came very close to being included in this market assessment, and although they have not met all the formal inclusion criteria, they should still be of interest to readers of this report:

Cisco’s WebEx offering is used primarily for real-time communications and Web conferencing. It is more aligned with Cisco’s unified communications portfolio, which places it outside the scope of this Magic Quadrant. A more comprehensive collaboration and social software offering would naturally complement Cisco’s current product portfolio, and we will assess any new offerings as they appear on the market.

KickApps and Lithium Technologies. KickApps and Lithium Technologies are examples of vendors with products that support outward-facing deployments primarily among customers (and therefore outside the scope of this Magic Quadrant). However, in actual use, they do make it easier for internal users (typically sales and marketing, customer service or support staff) to work together within a shared environment that brings information and insights gleaned from the customer communities supported on the same platform (or gathered from the public social Web). At the same time, their products can be integrated with internal workplace environments (such as e-mail or Microsoft’s SharePoint), as well as transactional business applications. Although not typically deployed as general-purpose collaboration and networking environments for internal users, these products can be used to support internal users for social ideation, collaboration and customer-facing activities.

NewsGator’s Social Sites is a popular offering delivering microblogging, communities, activity streams, innovation management, enhanced Really Simple Syndication (RSS) feed capabilities, rich dynamic profiles and enhanced people search with visual expertise maps. Because Social Sites is built into Microsoft SharePoint (using the content storage, user profile and security controls directly from SharePoint), it could not be included formally in this Magic Quadrant as a self-contained solution.

Oracle’s Beehive offering combines messaging, team collaboration and social interaction. Its primary use is as an e-mail platform and is therefore outside the scope of this report. The Oracle WebCenter Suite 11g also includes substantial new capabilities, such as personal and group workspaces, social tagging and filtering and activity sharing (leveraging technology brought into Oracle with the BEA Systems acquisition), as part of a much broader suite that combines portal, business process management, content management, search and mashup/application development. It can be an attractive platform to support collaboration and social interaction within the context of other business applications, but it has not been included formally in this assessment as it is not marketed or deployed primarily to support collaboration.

SelectMinds offers a comprehensive corporate networking solution focusing on retaining and engaging current and former employees through talent communities and rich employee profiles. While the social networking solution from SelectMinds can integrate with any other existing collaboration or content management solution (and is often deployed alongside Atlassian Confluence), it does not offer its own, “self-contained” wiki, and therefore has not been assessed formally.

Yammer and Intradea (the latter through the Present.ly service) offer activity-centric microblogging platforms for enterprise collaboration. They would be of interest to those looking for a private “Twitter-like” platform, but they have not been included here as they do not meet all the functionality criteria.

Market Definition/Description

We view this market as consisting of products that are used within an organization, primarily among employees, to support teaming, communities and networking. The buyers in this market are looking for persistent virtual environments, in which participants can create, organize and share information, as well as find, connect and interact with each other. They are deployed mainly internally among employees. The business use of these products varies in terms of degree of formality and openness – from team information sharing and project coordination among a small, homogeneous group; to sharing best practices within a business unit; to encouraging networking and knowledge transfer among employees across the whole organization.

In general terms, products that compete in this market help users to:

- Find out about each other.
- Form teams, communities or informal groups.
- Work together on the same work objects.
- Discuss and comment on their work.
- Organize work from their perspective.
- Identify relevant work.
- Discover other people with common interests.

- Learn from others' expertise.

Some specific uses of products in this market include:

- Sharing team information and coordinating project-related activities by adding permanence and structure to ad hoc communications.
- Empowering communities of experts and interested parties (bonding people by specific interests, capturing best practices, disseminating lead-user innovation and providing an informal support network).
- Facilitating social interaction by helping people to establish and strengthen personal relationships, develop trust and, in the end, reduce friction and accelerate the business processes that people are engaged in.
- Accessing relevant knowledge and expertise that can be used to formulate a plan of action when decisions need to be made.

Change in the Scope of This Magic Quadrant Compared to 2008

In 2008 we included all products that met specific functionality and market presence criteria, irrespective of the targeted user audience and use cases. In 2009 we are restricting the products we include here to those that are used internally to target primarily employees. We adjusted the name of this market report from "Magic Quadrant for Social Software" in 2008 to "Magic Quadrant for Social Software in the Workplace," to reflect the more focused scope of our coverage in 2009. This change is based on feedback from clients who look for different capabilities and vendors for employee versus customer communities.

In this 2009 market assessment we focus on the market segment that contains products for internal workplace use. Social software supporting external communities, partners, customers and the like, where the majority of participants are external, will be assessed in a separate report at a future date. Products that are used both by internal and external users, and which fulfill the relevant inclusion criteria, will be included in both assessments.

The products available 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 any product that is generally available in this market, and where the vendors could provide a positive "YES" answer to ALL of these questions:

- Q1: Do you offer a product or products that are packaged, marketed and sold primarily to support collaboration and networking, as advertised in marketing material and as demonstrated in actual use?

- Q2: Is the product being used for general collaboration and networking support? (That is, it is NOT limited to a specific business process such as project management, e-learning or customer service, and it is NOT limited to a specific industry such as publishing or entertainment.)
- Q3: Are there at least 10 different customers that are actively using the product primarily among their internal users?
- Q4: Are there at least 75,000 active internal users (seats) for the product, in total, among all your customers?
- Q5: Are there at least three named customers deploying the product primarily for internal users that are willing to discuss the product with Gartner?
- Q6: Does the product support ALL the minimum functionality mentioned below, "out-of-the-box," without the need to purchase any other products from you or from other vendors – apart from the products that you mentioned above?

Minimum functionality required from products:

- **User management:** the ability to create, modify or retire user accounts.
- **User profiles:** information about each user can that be accessed by other users.
- **Roles and access control:** support for multiple roles (for example, editor, facilitator, community manager, moderator) with associated access controls.
- **Configurable group, project, team or community areas:** end users with the right permissions can create themed areas for a group, project, team or community.
- **Document sharing:** the ability to upload, store, organize and share documents.
- **Discussion forums:** support for a persistent environment to post questions and answers or to have general discussions.
- **Blogs:** end-user instant publishing functionality that displays entries in reverse chronological order and permits comments from others.
- **Wikis:** group authoring of collections of pages with support for "click-to-edit," change tracking and internal linking.

There have been some adjustments to the inclusion criteria when compared with those in our 2008 market assessment:

- The vendor must be able to demonstrate that the relevant product is being used among internal users within an organization (as opposed to internal or external use).

- We raised the total active user threshold to 75,000 (as opposed to 50,000 in 2008) and added the condition that these must be internal users (as opposed to being internal or external users).

As a result of these changes, some of the vendors in last year's assessment are not included here. However, despite narrowing the scope of deployments to internal use only, and despite raising the threshold for inclusion, we do include a larger number of vendors. This is because of new products coming onto the market, and because we have become aware of other products already in the market (see the relevant section below for details).

Please note that the above functionality is the minimum required for inclusion. The products will be evaluated on the minimum as well as additional optional functionality. Also note that although we look for evidence of market presence in order to exclude some of the very small vendors, we deliberately do not have an explicit test for minimum revenue. This means 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, revenue 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.

Vendors Added

- Central Desktop.
- CubeTree.
- Ektron.
- Neighborhood America.
- PBworks (the company changed its from PBwiki, which was included in the 2008 Magic Quadrant).
- Saba.
- SITEFORUM.

Vendors Dropped

- Awareness.
- GroveSite.
- Josh.
- LiveWorld.
- Lithium Technologies.
- ONEsite.

- PBwiki (included in the 2009 report as PBworks after its name changed).
- Six Apart.
- Small World Labs.
- Vignette.

All the above vendors (with the exception of PBwiki, which is included here under its new name PBworks, and Vignette, which was acquired by Open Text) were removed because of the new narrower scope of the Magic Quadrant, which now only includes products targeting internal, workplace deployments. Many of the vendors not included here will be assessed separately in future reports that cover products for externally facing deployments.

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, wiki spreadsheets, social tagging, social bookmarking, social search, general analytics, expertise location, group formation based on common interests, content/people ratings, alerting mechanisms and people/content recommendations. 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.

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 its activities, its profitability, the overall size of its 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, consistent revenue growth over the last 12 to 24 months, and the opportunity to convert existing customers to products with new or additional capabilities.

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.

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.

Table 1 shows weightings for our specific evaluation criteria.

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.

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	standard
Marketing Execution	standard
Customer Experience	high
Operations	standard
Source: Gartner	

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, and any strategy for converting large numbers of early adopters to high-end or broader deployments.

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 Internet Protocol [IP] telephony), mobile support, the neutrality of infrastructure dependencies (operating system, 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 revenue, 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), browser-based rich authoring, 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; social network analysis; participation metrics and analysis; activity tracking; and adaptive people and content recommendations.

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 shows weightings for our specific evaluation criteria.

Table 2. Completeness of Vision Evaluation Criteria

Evaluation Criteria	Weighting
Market Understanding	high
Marketing Strategy	standard
Sales Strategy	standard
Offering (Product) Strategy	standard
Business Model	low
Vertical/Industry Strategy	low
Innovation	high
Geographic Strategy	no rating
Source: Gartner	

Leaders

Leaders are well established vendors with widely used social software and collaboration offerings. Their leadership is being established through an early recognition of user needs in this market, their overall market presence, and their success in delivering user-friendly and solution-focused suites with broad capabilities.

Challengers

Vendors in the Challengers quadrant offer solutions that are poised to move into leadership but have not yet done so. They have a strong market presence in general, or strong products, and the market position and resources to become Leaders. But they may not have either 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 and product road maps display a penchant for innovation, 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 or Leaders, but have demonstrated vision across a range of capabilities.

Niche Players

Niche Players form the bulk of the vendors in this Magic Quadrant. They provide useful focused technology, understand the changing market dynamics, and are working toward evolving their product capabilities. However, they are still held back by breadth of functionality, by product road map urgency, or by lack of an innovative growth strategy. Many of the smaller vendors may enjoy success relative to their size, but need to exploit every opportunity to grow and establish their positions before their competitive differentiation begins to erode. As the social software market continues to mature, pockets of specialization can solidify. Therefore, a viable alternative strategy for a minority of smaller vendors is to focus on niche markets serving specific verticals or supporting specific activities. Many of these vendors are unlikely to break out of the Niche Players quadrant, even though they may continue to have a long-term viable business.

Vendor Strengths and Cautions

Atlassian

Atlassian is a Challenger because it has demonstrated the ability to penetrate a global market with its popular wiki functionality, but needs to demonstrate more vision in evolving additional social software functionality.

Strengths

- Atlassian’s Confluence is a popular early example of a wiki-centric suite. New social capabilities were introduced with Confluence 3.0 in June 2009, including enhanced profiles, activity streams, microblogging and an OpenSocial container bringing third-party or self-built applications directly into Confluence.
- The company is strong in user experience and rich content.
- Confluence is a global product used by over 7,000 organizations in over 90 countries across multiple industries.
- Atlassian has a straightforward sales process that relies more on transparency and Web distribution than on a traditional sales force. It also offers low server-based pricing (starting at \$10 for 10-user teams and capped at \$12,000 for an unlimited number of users) and a “try before you buy” option. It offers both on-premises and hosted options.
- It uses open-source components as part of the core product and the runtime environment, and makes the source code available for inspection.
- Its Java-based infrastructure supports several runtime engines and databases.

Cautions

- Aside from its strong wiki capability, social networking and blogging, other social capabilities are relatively weak. However, the company does manage a rich repository of plug-ins which extend confluence capabilities but add to cost and complexity.
- Atlassian is a relatively small company (about 200 employees) and Confluence is one of many products it builds and sells that can impact its ability to continue evolving Confluence.
- Atlassian needs to attract more non-technical buyers.

Blogtronix

Blogtronix is in the Niche Players category because its strong product capabilities and global customer base are primarily based around smaller implementations within the financial industry.

Strengths

- Blogtronix, despite its name, offers a robust basic social software suite founded on integrated blog, wiki and social networking capabilities. It also offers capabilities such as microblogging, tags, alerts, RSS, search and mobile support.
- It competes on ease of use and flexibility, and is quick to install and use with multiple deployment options such as SaaS, on-premises software and a social software platform appliance.
- The Blur.it multimedia “microsocial” network acquisition (a social networking platform built around microblogging) may provide another way to be noticed by organizations looking for private microblogging – especially when it becomes available to third-party resellers and SaaS ISP providers as a white-label solution.
- The company has strong customer implementations in the financial industry, and a global presence, with 20% of its customers in Europe.

Cautions

- Blogtronix is weaker in document management and structured collaboration but has strong integration with EMC Documentum.
- The company’s small size (about 30 people and a few hundred customers), small partner network and limited large enterprise deployments limit its ability to execute.
- It is rebuilding its platform architecture for broader functionality and greater flexibility in extending its capabilities.

blueKiwi Software

blueKiwi Software is in the Visionaries quadrant because of its understanding of social interaction support.

Strengths

- blueKiwi Software gained early traction with large European organizations (and more recently in the small or midsize business [SMB] market), with a product focusing on information sharing and employee networking.
- It offers comprehensive functionality, ease of use and multiple deployment options (SaaS and on-premises deployment), with strong participation, social networking analytics, microblogging, extensive community management, polling and ideation.
- The company has a geographic advantage in Europe.
- blueKiwi’s relationships with Alcatel-Lucent and Dassault Systemes will give it additional leverage in the market and a stronger solution-based focus (especially to support product life cycle management and CRM activities).

Cautions

- Despite some growth in 2008, blueKiwi is a small company with about 30 employees, limited resources and limited activity outside Europe.
- Its product is weak in supporting structured collaboration – such as task or project tracking.
- It has limited enterprisewide deployments.

Central Desktop

Central Desktop offers an innovative, user-friendly and popular service, but its focus on small deployments means that it can only be a Niche Player in this market.

Strengths

- Easy to use, SaaS-only, shared work space-oriented offering.
- Built-in Web meeting support and salesforce.com integration.
- Active customer communities.

Cautions

- Small company (fewer than 30 employees) targeting primarily the SMB market, with limited experience of large deployments over 1,000 users.
- Limited networking and community functionality.

CubeTree

Despite being in the market for less than a year, CubeTree is in the Visionaries quadrant because of fast product evolution, its vision of blending internal and external communities and networks, and its innovative viral adoption model.

Strengths

- Intuitive, user-centric SaaS-only collaboration and networking offering.
- It has a continuously expanding, broad set of capabilities with an emphasis on activity sharing, dynamic profiles, social filtering, rich authoring and document/office integration, as well as integration with dozens of online services.
- The viral “Freemium” adoption model is capitalizing on internal or cross-company workspaces initiated by end users.

Cautions

- CubeTree is a very new, small organization with a very limited track record, partner ecosystem or geographic presence.
- CubeTree’s product launched in May 2009 and has a limited number of deployments.

CustomerVision

CustomerVision is a smaller Niche Player providing strong social feedback and knowledge capture capabilities, mainly in the U.S.

Strengths

- CustomerVision offers a broad collaboration and networking platform, and is strong in social feedback and knowledge capture and sharing.
- It has a good mix of customers using the product for both internal and external collaboration.
- The product is available as a hosted service or on-premises installation and can be deployed rapidly and without significant IT involvement.

Cautions

- Present only in the U.S., CustomerVision is very small (18 employees) and has a small ecosystem.
- It has limited R&D capacity.

Drupal

Drupal is in the Visionaries quadrant because of its use of the open-source model to drive adoption and popularity, while providing enterprise services via organizations such as Acquia.

Strengths

- Drupal offers a popular and extensive open-source platform with large high-profile deployments, a very active developer community with over 600,000 members, a good track record of community support, and a growing ecosystem of service providers.
- Also available is Acquia Drupal, the commercially supported version of Drupal from Acquia – a commercial venture-capital-funded organization headed by the founder of the Drupal open-source project.
- Its strong content-centric, community and Web application foundation is being rapidly extended with hundreds of modules, including many for collaboration and social interaction support.

Cautions

- The thousands of modules from third parties is a source of strength but quality is variable. The use of modules beyond the core distribution requires careful evaluation and ongoing support provisions, by engaging directly with the developer community or through the services of organizations such as Acquia.
- The breadth of the platform functionality is an advantage but it also contributes to deployment complexity (though “Install Profiles” such as Open Atrium and planned services such as Drupal Gardens can help to reduce this complexity).
- Acquia is growing fast (doubling its employees to 45 in the last 12 months) but it is still a small and new organization with an unproven ability to execute.

Ektron

Ektron has already been successful by adding social tools for external communities on top of its flagship content management system, and it is getting traction with employee communities and networks.

Strengths

- Ektron’s intranet, launched in 2007, adds collaborative support and social tools as a “Starter Site” (template) on top of the Ektron CMS400.NET content server.
- It combines strong content management with activity feeds, blogs, wikis, discussions, profiles, social networks and dashboards, as well as workflow, task management and a sophisticated server synchronization engine.

- It specializes in the healthcare and education vertical markets, in addition to its horizontal focus.
- It has recently invested in new regional sales and service offices, and is building its professional services organization.
- Ektron has a well-designed partner program which gives it an extensive global partner network.

Cautions

- Despite growing success with internal deployments among its customer base, Ektron needs to build up its visibility as a collaboration and social software vendor independently of its reputation in content management.
- Ektron needs to continue to build out its product with additional capabilities for group interaction, such as expertise location and social filtering.

EMC

EMC has based its CenterStage product on a solid company foundation, but the relatively new offering still needs to be validated by the marketplace.

Strengths

- EMC has a large enterprise presence with Documentum Content Server and Documentum eRoom (which is superseded by CenterStage).
- EMC's Documentum CenterStage has a broad set of capabilities including team spaces, communities, tagging, wikis and blogs, on top of Documentum Content Server.
- The company has a global presence and services capability, as well as a well designed partner program.

Cautions

- CenterStage is a new product that will need time to mature.
- CenterStage requires a Documentum Content Server license, which will limit its appeal beyond EMC's current customer base.
- CenterStage is not backward-compatible with eRoom, and eRoom customers looking at CenterStage will either need to run multiple environments or use services to help them migrate.

EPiServer

EPiServer is a Niche Player with a strong community support product. It is evolving its business, which historically was externally facing, to suit the workforce-facing market.

Strengths

- EPiServer's Relate+ Intranet Edition represents an attempt to leverage EPiServer's strength in supporting large external communities in a new context (internal deployments).
- The company is growing fast (it currently has 140 employees) and has expanded its presence with local offices in the U.S. (Chicago), Australia, South Africa and Vietnam. It also has a large and active partner network (sales are 100% via the partner network) mainly in Europe and in particular the Nordic countries.

Cautions

- The company is only starting to establish its presence outside Europe.
- Internal, behind-the-firewall deployments are a growing but still small part of EPiServer's business.

eTouch Systems

eTouch Systems is a Niche Player that is still evolving its product and its business.

Strengths

- eTouch offers an easy-to-install Java-based, wiki-centric product with additional profile, document sharing and blog functionality.
- It has already had positive feedback from large customers concerning its usability and vendor responsiveness.

Cautions

- eTouch is a small company (15 employees) with limited ability to execute.
- Its product needs to evolve beyond its core wiki functionality to stay competitive.

FatWire

FatWire is leveraging its strength and presence in Web content management to enter this adjacent market.

Strengths

- FatWire is best known for its Web content management product, but the company also offers TeamUp 3.1 for collaboration support, which can be used with or without other FatWire products.

- TeamUp has reasonable baseline collaboration functionality, and is strong when it comes to creating and managing rich content with built-in document asset management (DAM) and transcoding modules with flexible APIs for mashups. FatWire's bundled Content Integration Platform makes it easy to access content stored in disparate locations (including SharePoint and Documentum repositories) for use in collaboration.

Cautions

- The product's primary appeal is among existing FatWire customers and creative marketing teams or media agencies dealing with rich media content.
- Given the company's focus on supporting the external "Web experience," it has less experience with internal collaboration and social interaction deployments.

Google

Google is in the Visionaries quadrant because of its early lead in terms of in-document collaboration, and its potential for market disruption despite the current state of its Google Apps Premier Edition (GAPE) offering.

Strengths

- Google is a strong brand with a very large consumer base.
- It has enjoyed viral adoption by individuals, creating demand for enterprise versions (in GAPE).
- It is strong in online document authoring and sharing (including in-document collaboration), with additional support for site authoring, discussion and messaging.
- It also has plentiful R&D resources, a track record of fast-paced innovation, and a flexible delivery model.
- It has the potential to disrupt the market by aligning GAPE with Google Wave.

Cautions

- The main interest in GAPE has been for e-mail services, with limited traction so far for general collaboration-led enterprise deployments.
- Entering the enterprise IT market is an opportunistic move that is increasingly strategic but not central to Google's strategy; Google needs to do more to meet enterprise requirements.
- The company is weak on social interaction support, group formation and information organization/filtering.
- The SaaS-only model will limit the appeal for some organizations.

Huddle

Huddle is in the Visionaries quadrant because of the speed at which its product has evolved through partnerships and its innovative viral adoption model.

Strengths

- Huddle 4.1 is a SaaS collaboration offering that emphasizes a combination of live (same time, any place) and asynchronous (any time, any place) collaboration.
- It also emphasizes integration with the social Web (including Facebook, LinkedIn and Google Docs).
- Huddle competes on low complexity and cost, with unlimited users per account and a free limited version that encourages viral growth within and between organizations.
- The product is simple to use; strong in discussions, document sharing and structured collaboration (shared calendars and task management); offers deep, secure integration through Facebook applications and Microsoft SharePoint; and has newly added Web and voice conferencing capabilities.

Cautions

- The company is oriented toward structured collaboration with weaknesses in social networking.
- Despite growing in size to 36 people, and planning a U.S. presence, Huddle is still a small U.K.-based company.
- Its SaaS-only offering may not appeal to enterprises delivering workforce-facing social software implementations that involve sensitive information.

IBM

IBM is a Leader by virtue of being ahead of the market with a strong market presence.

Strengths

- IBM Lotus Connections 2.5 offers a comprehensive social software suite that includes a newly launched wiki.
- IBM offers 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, Microsoft Office/Outlook or the WebSphere portal, with which Lotus Connections is closely aligned.

- IBM's LotusLive SaaS offerings add more deployment options for customers and will allow IBM to engage with smaller organizations.
- It has a Web-oriented architecture with full REST APIs, as well as complementary analytics and social network visualization and exploration using IBM Atlas for Lotus Connections.
- Interest in IBM's product is growing and it has sizable enterprisewide deployments.
- IBM is an established workplace technology global vendor.

Cautions

- Users who need more than the new File Services functionality in Connections 2.5 can also deploy IBM's Lotus Quickr, but this will add to cost, complexity and usability issues.
- The functionality in some of IBM's LotusLive SaaS offerings (for example, LotusLive Connections and LotusLive iNotes) is more limited than the on-premises options.
- Usability could be improved.

IGLOO

IGLOO is a Niche Player that needs to expand its visibility and reputation as an enterprise vendor.

Strengths

- IGLOO has a SaaS-only offering that supports basic document-centric collaboration and information sharing with some social networking and analytic support.
- It has an established presence both in workplace communities and externally facing marketplace deployments.
- It offers a desktop client with offline capabilities and a native BlackBerry client.
- It has regular and aggressive product update schedules.

Cautions

- There was growth in 2008 both in terms of employees (now around 45) as well as new clients, but the company needs to build up its visibility and reputation as an enterprise vendor.

Jive Software

Jive was an early entrant in this market, and is now in the Leaders quadrant because of its mature product, solution focus, vision of bridging internal and external communities, and strong evidence of market acceptance.

Strengths

- Jive's Social Business Software combines broad support for structured collaboration with tasks, projects and limited workflow. Social interaction support is via rich profiles, tagging, blogs, wikis and social network analytics.
- Jive has a solution-based focus, strengthened via partnerships (such as that with SAP BusinessObjects BI OnDemand for analyzing and exploring social networking data); as well as success with selling to non-IT buyers and experience with both internal and externally facing deployments.
- It offers an innovative combination of on-premises, hosted and cloud services (using Amazon's EC2) deployments.
- There has been increasing customer interest and positive customer feedback both for the product and the organization.
- Jive has a clear strategy for adding value to the enterprise's ability to build and capitalize on productive communities.

Cautions

- Growth needs to be handled carefully as Jive establishes its position as an enterprise vendor.
- Third-party add-ons and module-based pricing add to cost and pricing complexity.

Leverage Software

Leverage Software is now in the Visionaries quadrant because of the strength of its offering in supporting communities and networks.

Strengths

- Leverage Software has established a market presence in external communities (customer, partner, developer, service, hospitality) and a growing business that focuses on internal employee communities (with at least one large internal deployment for over 300,000 users).
- It offers deep community implementation and strategy experience.
- Leverage also offers advanced social network analysis to identify "friends," social search, visual "people maps" and geotagging, in addition to a broad range of collaboration and social software capabilities, including rich profiles, tagging, blogs, wikis, chat, polling, recommendation engines and private/public groups. There is also a single content storage repository for content retrieval into multiple tools (for example blog content can be retrieved and enhanced as a wiki).
- A single content storage repository enables content retrieval into multiple tools. For example, content created in a blog can be retrieved and enhanced as a wiki.

- Its all-inclusive pricing based on active users limits the cost of initial investments.

Cautions

- Liferay has functional gaps in document handling and structured collaboration.
- Its easy to use Web services and REST APIs make SaaS-only delivery more accessible, but this may not be enough for organizations that prefer on-premises deployments.
- Liferay is still a small organization (about 25 employees), with activities mainly in the U.S.

Liferay

Liferay is leveraging the popularity of its Liferay Portal as a vector to deliver a social software solution.

Strengths

- Liferay offers collaboration and social interaction functionality as part of Liferay Portal for those looking to embed it in a flexible environment that leverages the portal capabilities for development and integration. It offers a prebuilt solution through Liferay Social Office, which combines team-oriented information-sharing capabilities with informal content creation and organization through content management (including integration with Microsoft Office via Microsoft's published SharePoint protocols). It also offers blogs, wikis, discussions, activity tracking, tagging, federated search and content/people recommendations.
- Social Office is a natural add-on for those committed to the popular open-source Liferay Portal server.
- Liferay has a healthy developer and partner ecosystem.

Cautions

- The availability of the complete product as an open-source download encourages use and creates demand, but Liferay needs to work harder to built its reputation as a collaboration platform vendor. Although there is good evidence that Liferay Portal is being used to provide collaboration and social networking in the context of larger portal deployments, Liferay Social Office is still relatively new in this market.

Microsoft

Microsoft has used the popularity of SharePoint to successfully deliver "good enough" social capabilities to many mainstream organizations that value the breadth of the platform and the solidity of a large vendor.

Strengths

- With Microsoft Office SharePoint Server 2007 (MOSS 2007), Microsoft offers a broad set of capabilities that combine structured collaboration with core social computing capabilities, including blogs, wikis, podcasting, discussion groups, "people search" that uses social network analysis, and related rich content, portal and workflow capabilities.
- There is growing demand for, and evidence of, large-scale successful deployments for social networking based on SharePoint's My Sites functionality, to complement existing structured collaboration deployments.
- The company has a commitment to social computing in the context of a general-purpose workplace computing platform.
- There is integration with desktop office applications and related offerings such as Microsoft's productivity tools, a leading e-mail server, a unified communications suite, Web-based meetings and Live Services, and a SaaS option including "mixed-mode" deployments based on Microsoft's Business Productivity Online Suite.
- Microsoft has market presence as a dependable global vendor with a very strong technology and service partner network.

Cautions

- Microsoft SharePoint is a platform, and significant effort can be required to deliver a social computing solution on top of it. This is a double-edged sword in that the platform delivers both flexibility and complexity. This may deter those who are looking to take advantage only of the collaboration and social networking capabilities, and those not fully committed to Microsoft's infrastructure services.
- There are functional gaps in the current version of MOSS 2007, including social tagging and bookmarking, social search and an improved wiki (although these are likely to be addressed in the forthcoming SharePoint 2010 version in the first half of 2010).
- SharePoint does not appeal to non-IT buyers looking for a specific solution to a business problem.

MindTouch

MindTouch offers a feature-rich product on top of a flexible open-source engine.

Strengths

- MindTouch 2009 Enterprise offers rich social suite functionality, including a Windows desktop connector for drag-and-drop, document attachments with in-browser viewing, and integration with SugarCRM, salesforce.com and graphing and mind-map engines.
- It offers migration from existing MediaWiki deployments.
- There are extensive REST APIs, along with a Web service orchestration engine offering extensibility and integration, which make it possible to: add social functionality to other applications; embed external widgets (from Google, Yahoo or Flickr, for example); or mix external data with MindTouch content to create dashboards, dynamic reports or mashups.
- MindTouch has a growing partner and developer ecosystem that includes Novell and Microsoft, as well as large numbers of active external developers who are contributing to localization and other development efforts.

Cautions

- MindTouch is a small, young organization that needs to enhance its reputation for supporting large enterprise deployments.
- The core engine is available with an open-source license (built on Microsoft.NET and Mono), but advanced functionality for charting, connecting to databases or business applications, directory integration, and deep desktop integration are only available with a MindTouch commercial license.

Mzinga

Mzinga leverages its strength in the corporate learning market but is still a Niche Player. As Mzinga expands its focus on internal deployments the value of its integrated community offering will become more evident.

Strengths

- Mzinga has a strong presence in external social media and networking deployments, as well as in supporting internal talent development and social learning activities.
- It offers full service provider community services, strategic consulting and moderation services.
- It has complementary offerings in e-learning, talent development and customer support. The OmniSocial offering, released in September 2009, increases the integration among these components.
- The company recently completed a \$10 million round of financing, which it plans to use to continue updating its products and improve analytics.

Cautions

- Although it has been gaining traction with general-purpose internal employee collaboration and social networking deployments, this is still a relatively new area for Mzinga.
- It has weak content/document authoring, informal project support and information organization.

Neighborhood America

Neighborhood America offers a capable and successful offering in social CRM, but is in the Niche Players quadrant here because of limited traction with internal deployments.

Strengths

- Strong cross-industry customer base with robust workforce and externally facing implementations.
- Offers services for community initiative strategy, design and implementation.
- Strong analytics capability with an underlying data warehouse, reporting and online analytical processing engine.
- Robust support for mobile computing.

Cautions

- The company's main focus is on social marketplaces, and it has less experience in internally facing, general-purpose collaboration support.
- It offers weak document authoring and sharing.
- Its SaaS-only offering may not appeal to enterprises delivering workforce-facing social software implementations that involve sensitive information.
- Its presence is primarily in North America.

Novell

Novell has a capable product (which was a result of the SiteScape acquisition in 2008) but needs to improve its visibility and market acceptance.

Strengths

- Novell Teaming combines structured collaboration with flexible support for communities and social interaction.
- Novell has an established presence in enterprise messaging, a commitment to collaboration and social interaction support and an innovative road map.

- Its product can be deployed with or without the complementary communications capabilities (Web conferencing, presence and telephony integration), and can benefit from Novell's DataSync technology for connecting to external repositories and business applications.
- Novell Teaming V2 has been re-engineered for improved performance and usability.
- The company has a global channel and partner ecosystem.

Cautions

- Product visibility beyond the existing Novell customer base is limited.
- Novell needs to improve its visibility beyond IT buyers.

Open Text

Open Text emerged as a Challenger with the introduction of social capabilities into its enterprise content management (ECM) suite and the acquisition of Vignette.

Strengths

- Open Text's ECM suite has a long track record in large enterprise deployments for structured collaboration that requires task management, workflow, calendar integration, communities (including wiki and blog functionality) and basic project management.
- With the addition of fundamental social software functionality such as profiles, blogs, tagging, social search and alerting, Open Text's collaboration offering represents a very broad range of content and document management, real-time collaboration and mobile computing.
- Open Text has an enterprise focus with vertical differentiation, as well as a broad geographic presence, and views social capabilities as critical to its product evolution.
- The newly acquired Vignette Collaboration 7.2.3 supports user-generated content, idea management, ratings and tagging, as well as enhancements to existing blog, wiki and discussion capabilities. Its integration with Vignette Portal provides additional flexibility with application integration options or customer-facing external deployments.

Cautions

- Open Text's social software capabilities are new and have not matured. Some weaknesses exist in areas such as social analytics, bookmarking and social ratings.
- The new social software capabilities (branded as Open Text Social Media) do not yet have a large number of customer implementations.

- Vignette Collaboration continues to be available as a separately packaged product, but potential buyers should make sure they understand Open Text's long-term plans for the product before committing to it.

PBworks

PBworks is a simple and easy to use service, but needs more differentiation and a sharper focus on larger deployments to move beyond the Niche Players quadrant.

Strengths

- As a SaaS offering, PBworks is very easy to set up and use, with "instant gratification" appeal.
- The company offers solution-based packaging around projects and specific verticals (such as the legal market).
- It offers flexible integration APIs with external services including OpenID.

Cautions

- It offers comprehensive functionality, but the focus is more on shared workspaces than social networking.
- There is a SaaS-only option with modest integration capabilities beyond general APIs.
- PBworks is a small company with a limited track record.

Realcom-US

Realcom Inc. (the entity that resulted from the merger between Realcom and AskMe in 2008) is in the Niche Players quadrant, despite its long track record with large-scale knowledge management deployments, because it needs to evolve its product and increase its visibility and market traction.

Strengths

- Realcom's AskMe Enterprise 9 has a knowledge management orientation, with a track record in high-end deployments and strong social networking (including social network analysis), expertise location and search capabilities. The latest release added better support for knowledge networks, new analytics to monitor usage patterns, and enhanced reporting. A separate product provides similar functionality but leverages Microsoft's SharePoint for the core user management and content capabilities.
- The company has a strong presence in Japan.

Cautions

- Limited market visibility.

Saba

Saba is a Niche Player as it tries to leverage its strong presence in adjacent markets.

Strengths

- Saba is an established public company with over 500 employees, a strong partner program and a global presence.
- The company's main social software product is Saba Collaboration Suite, which includes Saba Social and Saba Centra (a conferencing tool).
- It has relationships with non-IT buyers who are interested in social software from their specific perspective – for example, related to learning or talent and performance management.

Cautions

- Saba is well known in the corporate learning systems market but has yet to establish itself as a major player in the social software market.
- Saba needs to continue to develop its platform to include more community-oriented features such as group support, tagging and shared calendars. It also needs to improve its document management functions.

SITEFORUM

SITEFORUM is a well liked vendor with a functionally rich platform offering, and is in the Niche Players quadrant because of its limited traction in terms of internal deployments.

Strengths

- A scalable SaaS solution used both internally for collaboration and social networking and externally for customer communities and networks.
- Once set up it is easy to use, and if necessary it can be customized with a flexible development toolkit (SITEFORUM Studio). The vendor is also willing to customize to suit specific customer needs (such as SAP, Active Directory and salesforce.com integration).
- Positive customer feedback.
- SITEFORUM offers an innovative application store for selling and distributing add-on modules developed by third parties or SITEFORUM, and has partnerships with Internet and network service providers.

Cautions

- SITEFORUM is a small organization (its headquarters and R&D are in Germany with a presence in the U.K.).
- Although it is gaining experience with internal collaboration and employee networking, SITEFORUM has more experience with externally facing deployments.

Socialtext

Socialtext is a visionary vendor that continues to innovate in this space, as demonstrated by its early addition of a microblogging capability and a wiki spreadsheet.

Strengths

- Socialtext was one of the first software companies to focus on social software; it has a sizeable customer base and mind share, and large-scale deployments of its product.
- It offers innovative new capabilities, including Signals, a Twitter-like microblogging module accessible through a dedicated desktop client as well mobile devices; a dashboard mechanism based on the OpenSocial standard; and a wiki-based spreadsheet.
- The solution is based on a Web-oriented architecture with granular Atom/RSS support, full REST APIs, and a general events handling engine that can channel and filter any events into Activity Streams.

Cautions

- Socialtext is a small organization that needs to do more to build up its reputation as an enterprise vendor.

Telligent

Telligent is a Visionary in terms of its technology road map, and in capitalizing on SharePoint proliferation, but it needs to emphasize its additional value as SharePoint's social capabilities improve.

Strengths

- The company has been successful with externally facing customer community sites offering features such as forums, blogs, feeds, tagging and particularly good moderation and filtering support. There is evidence of very large deployments.
- Telligent has social technology products directed at externally facing communities (Telligent Community) and at workforce-facing implementations (Telligent Enterprise).
- The product can integrate with different repositories and applications, including Microsoft SharePoint, Outlook and Active Directory.

- Telligent offers strong social analytic capabilities that it delivers as a separate product, Telligent Analytics.

Cautions

- Although very good in terms of general community support, there are some functional gaps in structured collaboration support (such as document handling, tasks, simple workflow and projects) that can only be addressed via integration with other products.
- Its strong ties to Microsoft technologies may limit the appeal to some organizations.

ThoughtFarmer

ThoughtFarmer is a well liked and capable product, but is in the Niche Players quadrant because of its limited experience with large deployments.

Strengths

- ThoughtFarmer targets internal deployments with comprehensive team collaboration and informal interaction functionality (including page creation via e-mail, mailing list integration, an organizational relationship browser, faceted browsing and PDF generation from collections of wiki pages).
- It is easy to use and innovative (offering, for example, “on-the-fly” content translation), with positive feedback from customers about the product and the vendor.

Cautions

- ThoughtFarmer is a small organization with a small client base and no evidence of large-scale deployments.
- It has limited document handling.

Tomoye

Tomoye is a veteran of community and networking solutions with a capable product and an organization with a deep understanding of issues beyond technology. However, it also needs to grow its business.

Strengths

- Tomoye has a lot of experience in collaboration and knowledge management, with many large and satisfied customers, especially in the defense sector.
- Its strength is in internal community support through rich profiles, participation metrics, social filtering and deep SharePoint integration.

- Customers have made positive comments about its end-user flexibility and Tomoye’s responsiveness.

- It offers a formal customer education program for building successful communities, reinforced by active customer communities.

Cautions

- Tomoye is a growing but small organization (with around 50 employees), with limited resources, geographic reach and vertical-market diversification (though it is particularly strong in the defense, education and healthcare sectors).

Traction Software

Traction’s sophisticated authoring and collaboration environment needs more visibility and market presence.

Strengths

- Traction Software’s TeamPage 4.2 has innovative capabilities, including sophisticated authoring, widgets, rich media support, PDF/Word export from collections of wiki pages (with tables of contents, cross references and appendices), document- as well as site-level versioning and moderation, content repurposing, tag-based content exploration with dynamic views, Twitter-like alerting and BlackBerry support.
- There have been positive customer comments on product usability and the responsiveness of the Traction organization.
- There has also been a new search engine partnership with Attivio, and the introduction of the Google Web Toolkit (GWT) for a faster, multibrowser, rich user interface (UI) experience.
- The company offers attractive unlimited user pricing options that encourage unmetered corporatewide “visitor” usage.

Cautions

- Traction is still a very small organization (with only 10 employees) that needs to grow faster if it is to avoid being left behind.

TWiki

A new organization, Twiki, Inc. (<http://twiki.net>), can capitalize on the popularity of the open-source TWiki.org by moving beyond the “technical enthusiasts” that have been a core constituent of its success so far.

Strengths

- An experienced executive leadership team, following a venture funding round for TWiki in 2009, may help to focus attention on the acceptance of TWiki in business environments beyond its current technical user base.

- TWiki.org provides a popular open-source, enterprise, wiki-centric collaboration platform reporting 10,000 downloads per month, several large-scale customer deployments, and an active developer and user community with a good track record in peer support.
- It has core wiki-centric functionality extended by a growing number of community plug-ins (currently 250+) that include task management, calendar integration, online spreadsheets, charting, mail integration and a powerful mechanism to capture and display structured content by integrating data feeds and workflows. Additional prepackaged functionality beyond the open-source core from Twiki, Inc. can support collaborative activities relating to project management, document management, CRM and sales automation. Another module (TWiki Connect) adds rich profiles, activity feeds, social networking and tagging.

Cautions

- Twiki needs to evolve in terms of usability and UI design, to increase its appeal to end users and non-IT buyers.
- Commercial support for the free open-source edition is available from organizations such as Twiki, Inc. and some system integration/consulting firms, but it needs to expand.
- The quality of the available plug-ins is variable. Users must conduct their own assessment of plug-ins beyond those certified and supported by Twiki, Inc. (about 40 of the most popular).

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.

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 that the individual business unit will continue investing in the product, will continue offering the product and will advance the state of the art within the organization's portfolio of products.

Sales Execution/Pricing: The vendor's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales 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 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 initiatives, 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, service-level agreements and so on.

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 to 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 products 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 sets 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 vertical markets.

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.