August 6, 2009

The Forrester Wave™: Collaboration Platforms, Q3 2009

by Rob Koplowitz

for Information & Knowledge Management Professionals

August 6, 2009

The Forrester Wave™: Collaboration Platforms, Q3 2009

Microsoft And IBM Lotus Lead; Novell Challenges

by Rob Koplowitz
with Matthew Brown and Sara Burnes

EXECUTIVE SUMMARY

In Forrester's 66-criteria evaluation of collaboration platform vendors, we found that Microsoft and IBM Lotus led the pack based on the breadth of functionality in their offerings. Novell edged into the Leaders' quadrant with its Teaming product. MindTouch, the only open source option in this Forrester Wave, landed as a Strong Performer. Open Text represented a strong option, particularly for current Open Text ECM Suite customers. Atlassian, Jive Software, Socialtext, and Traction Software all approach the market with strong social networking capabilities. New entrant Cisco WebEx debuted as a Contender and will look to disrupt the market landscape over time. Central Desktop is the only pure software-as-a-service (SaaS) offering with a focus on small and medium businesses, as well as enterprise departments.

TABLE OF CONTENTS

NOTES & RESOURCES

Forrester conducted demo-based evaluations in Q1 2009 and interviewed 11 vendor and user companies: Atlassian, Central Desktop, Cisco WebEx, IBM Lotus, Jive Software, Microsoft, MindTouch, Novell, Open Text, Socialtext, and Traction Software.

Related Research Documents

Collaboration And Web 2.0 Technology Adoption, Q4 2008
April 2, 2009

Notes Versus SharePoint: Which Collaboration Platform Is Right For You?
November 7, 2008

COLLABORATIVE PLATFORMS DRIVE KNOWLEDGE WORKER EFFICIENCY, LOWER RISK

The vast majority of collaboration continues to take place through email, with knowledge workers passing file attachments. The fundamental inefficiencies of this approach are creating numerous enterprise pain points. Users cannot find the most current version of content. There is very little structure available in email to drive best practices. Content artifacts — like documents and threaded discussions — are not easily reusable. And it is difficult and costly to identify content that requires special handling for compliance, security, and privacy purposes.

To address these inefficiencies, organizations have embraced collaborative platform technologies. By moving collaboration from email to workspaces for basic team-based document collaboration — collaborative applications for building more robust content-centric collaborative applications, that may include custom coding, and workflow and social networks that enable Facebook-like capabilities within the enterprise, companies realize a number of benefits:

- **Knowledge worker efficiency.** By providing users with a single place to store and collaborate on content, collaborative platforms remove inefficiencies associated with collaboration through email. Basic library services like check-in, checkout, and versioning allow greater control over content creation and sharing. Further, IT's ability to build and deploy custom templates and workflow drives more efficient and effective business process flows.

- **Improved knowledge capture.** Information stored in email systems is difficult to leverage for future reuse. By moving content into a collaborative platform, workers can more easily discover and reuse knowledge artifacts — like presentations, forms, and images. Consider, for example, the value of capturing and reusing even a small number of the documents, discussions, and activities associated with developing a complex sales proposal.

- **More effective management of content.** Not all content is created equal. Some content, like repair manuals or official memos, need to be managed more stringently for reasons of accuracy, compliance, discovery, security, and/or privacy. By moving users into collaborative platforms, it becomes easier to identify content that requires special handling and to apply policy management within the platform or move content programmatically into a separate system of record.

- **Increased social networking effect.** Social networking capabilities, like those found on the popular consumer site Facebook, are quickly augmenting the value of traditional email or document-focused collaboration tools. Enterprise-focused social networking capabilities greatly enhance knowledge workers' ability to access relevant content and expertise in a business setting. Collaborative platforms are increasingly providing social networking capabilities and/or integrating with best-of-breed product offerings.[1]

EVALUATION OVERVIEW: BREADTH AND DEPTH CAN BE AT ODDS

To assess the state of the collaborative platforms market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of top collaborative platform vendors. Given the current market landscape, Forrester included a number of vendors that address collaboration from a social networking perspective, as well as more traditional collaborative platform vendors.

After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria. We evaluated vendors against more than 60 criteria, which we grouped into three high-level buckets:

- **Current offering.** To assess product strength, we evaluated each offering against seven groups of criteria: 1) collaboration platform; 2) language support; 3) architecture and administration; 4) monitoring and reporting; 5) security; 6) cross-platform support; and 7) Information Workplace readiness.

- **Strategy.** We reviewed each vendor's strategy, evaluating how well the vendor's planned enhancements will position it for market leadership and whether or not the vendor has the financial resources to support that strategy.

- **Market presence.** To determine a vendor's market presence, we evaluated each vendor's financial performance, installed base, integration partners, professional services, number of employees, and technology partners.

Evaluated Vendors Demonstrate Enterprise Rigor And Traction

Forrester included 11 vendors in the assessment: Atlassian, Central Desktop, Cisco WebEx, IBM Lotus, Jive Software, Microsoft, MindTouch, Novell, Open Text, Socialtext, and Traction Software. Each of these vendors has (see Figure 1):

- **Collaborative workspace capabilities.** This includes the ability to store and manage multiple artifacts with the space, not just the ability to share content over a network.

- **Basic content management capabilities.** These capabilities allow users to access a single copy of an artifact through the network.

- **The ability to customize the space for specific business purposes.** Personalized dashboards, workspace templates, and workflow capability are examples of customizability.

- **Enterprise capabilities for security and authentication.** Access-control lists (ACLs), single-sign on through Active Directory or LDAP support, and enterprise rights management capabilities (ERM) are some of the key components for enterprise security and authentication offered by these vendors.

- **A development environment for building custom collaboration applications.** The evaluated vendors provide development options for firms with very specific internal needs or for power users who want to self-provision custom applications.

- **At least 25 reference customers.** Products with at least 25 enterprise and SMB reference customers have reached a reasonable level of maturity and have been tested in the field.

- **An installed base of 1 million users or more.** Though the number of active users may vary, these collaboration platforms have each been deployed to at least 1 million users.

Figure 1 Evaluated Vendors: Product Information And Selection Criteria

| Vendor	Product evaluated	Product version evaluated	Version release date
Atlassian	Confluence	3.0	June 2009
Central Desktop	Enterprise Edition	n/a	SaaS
Cisco WebEx	Connect	5.0	SaaS
IBM Lotus	Connections, Mashups, Notes, Quickr	2.0/1.1/8.5/8.1.1	June 2008/2009
Jive Software	SBS	3.0	May 2009
Microsoft	SharePoint Server 2007 CAL, Enterprise Edition, SharePoint Designer 2007	3.0	November 2006
MindTouch	2009 Enterprise	9.02.2	April 2009
Novell	Teaming	2.0	July 2009
Open Text	Open Text ECM Suite (with Social Media 1.0)	3.5	June 2009
Socialtext	Socialtext	2.0	March 2009
Traction Software	TeamPage	4.1	December 2008

Vendor selection criteria

How well does the solution provide collaborative workspace capabilities?
How well does the solution provide basic content management capabilities?
How well does the solution provide the ability to customize the space for specific business purposes?
How well does the solution provide enterprise capabilities for security and authentication?
How well does the solution provide a development environment for development of custom applications?
Does the solution have at least 25 reference customers?
Does the solution have an installed base of 1 million users or more?

47748   Source: Forrester Research, Inc.

Vendors Come At This Market From Different Starting Points

The collaborative platform market is not new. However, it has evolved greatly over the past several years. New communication and content generation patterns — like microblogging, activity streams, and business social networks — attracted many new and highly relevant vendors to the market from social networking perspective. Information and knowledge management (IKM) pros increasingly compare these vendors to more traditional collaboration vendors because of their ability to address similar business issues around sharing information. At the same time, traditional collaboration vendors have recognized and reacted to the unique capabilities of social networking and are actively building these capabilities into their offerings. Lastly, traditional content management vendors continue to extend into collaboration, building out social capabilities as well. The result is a market where vendors from different market segments are converging on the same opportunities (see Figure 2). Depending on your core requirements, vendors from one area may be more appropriate for your needs.

Figure 2 Collaborative Platforms Are At The Intersection Of Collaboration, Content, And Social
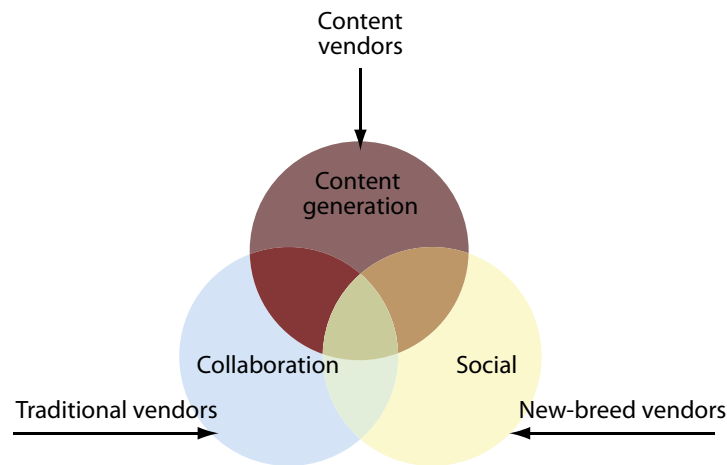
Source: Forrester Research, Inc.

THE RESULTS: TRADITIONALS LEAD, BUT THE OVERALL LANDSCAPE IS RICHER THAN EVER

The evaluation uncovered a market in which (see Figure 3):

- **Traditional vendors IBM, Microsoft and Novell lead on breadth of offering.** The vendors that have dominated the collaboration landscape for nearly two decades have all invested heavily over the past three years to keep their offerings at the forefront in terms of overall functionality. IBM Lotus placed a big bet on social functionality with the introduction of Quickr and Connections that has paid off. Microsoft has made SharePoint the centerpiece of

its collaborative platform strategy and has seen strong adoption of Microsoft Office SharePoint Server 2007.[2] Meanwhile, Novell's acquisition of SiteScape and rebranding as Novell Teaming has placed it in a solid position as a collaborative platform vendor.

- **Challengers all demonstrate unique strengths.** While traditional vendors offer broad functionality, a wide array of challengers offers unique and compelling value propositions. A number of vendors have jumped into the collaborative platform fray from the perspective of social networking and have made investments in core collaboration capabilities like workspaces to meet customer demands. These vendors, Atlassian, Jive Software, Socialtext, and Traction Software, can provide standalone collaborative platform capabilities or integrate as best-of-class social tools within an incumbent vendor's platform. MindTouch has built a strong offering and staked out the favored position among organizations with open source leanings. Enterprise content management (ECM) vendors have also entered the market. For example, Open Text continues to position its collaboration offerings as an adjacent capability to its overall ECM Suite. Open Text has invested heavily in upgrading its existing offering with social capabilities. Central Desktop is a pure SaaS offering and has focused on SMB and departmental opportunities, but it will look to move upstream within enterprises as SaaS becomes more a more mainstream option.[3]

- **Cisco WebEx debuts as a Contender.** Cisco WebEx has broken out of its traditional place as Web conferencing vendor with the addition of WebEx Connect, which includes workspace capabilities focused on more efficient team collaboration around document creation. Cisco is focusing on lightweight workspace capabilities that are easily accessed through its SaaS model.

This evaluation of the collaboration platform market is intended only to be a starting point. We encourage readers to view detailed product evaluations and adapt the criteria weightings to fit their individual needs through the Forrester Wave™ Excel-based vendor comparison tool.

Figure 3 Forrester Wave™: Collaboration Platforms, Q3 '09
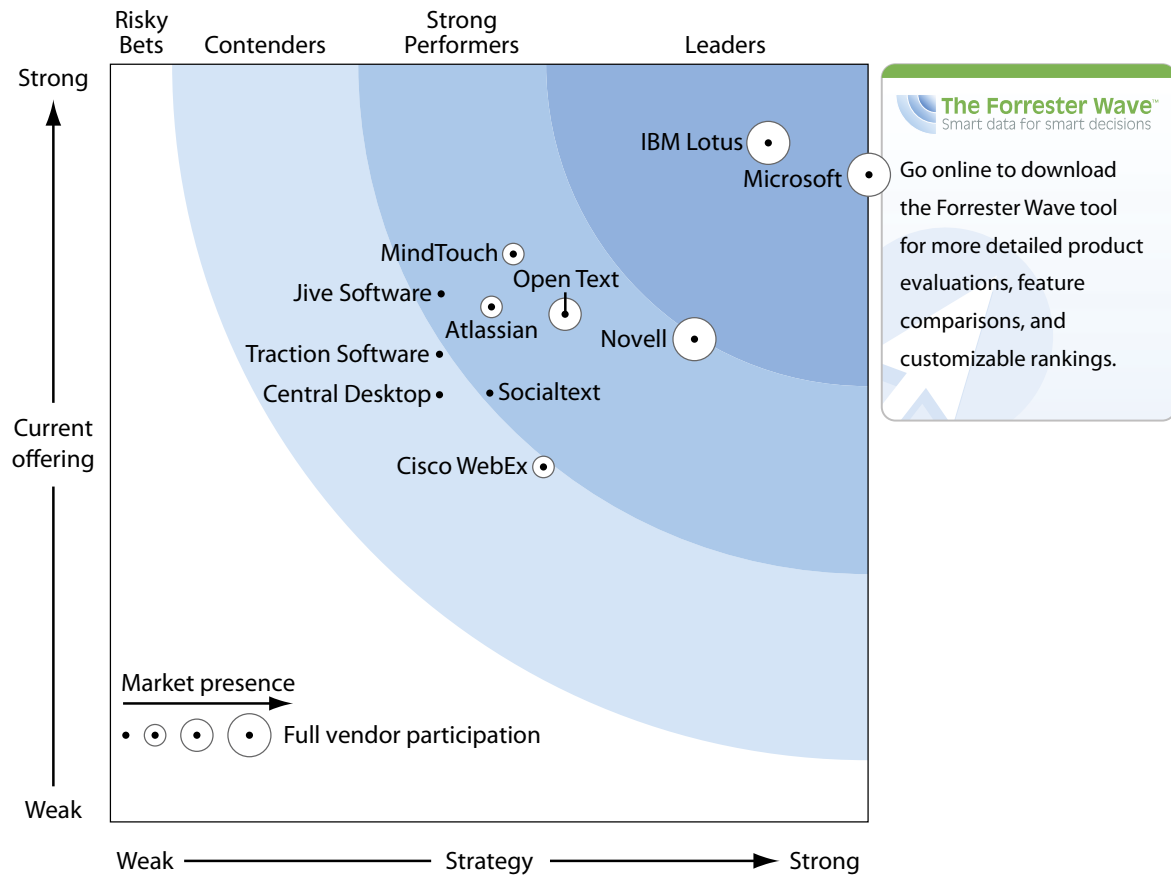
Figure 3 Forrester Wave™: Collaboration Platforms Q3 '09 (Cont.)

	Forrester's Weighting	Atlassian	Central Desktop	Cisco WebEx	IBM Lotus	Jive Software	Microsoft	MindTouch	Novell	Open Text	Socialtext	Traction Software
CURRENT OFFERING	50%	3.43	2.82	2.34	4.48	3.48	4.27	3.74	3.19	2.84	2.84	3.08
Team collaboration platform	30%	3.53	3.15	1.75	3.95	3.20	3.98	3.65	3.70	3.80	3.80	3.13
Team collaboration language localization	10%	2.25	1.00	1.50	5.00	1.50	5.00	4.00	1.75	1.00	1.00	1.00
Architecture and administration	10%	4.50	2.50	2.50	4.50	4.00	4.13	4.00	3.50	4.50	4.50	3.00
Event logs, monitoring, and reporting	15%	3.08	4.34	3.30	5.00	5.00	5.00	4.67	2.65	2.32	2.32	4.26
Security	10%	3.00	2.60	3.30	4.40	3.10	4.30	3.90	3.70	3.50	3.50	3.70
Cross-platform support	10%	5.00	3.00	2.50	5.00	5.00	4.00	3.00	2.50	1.00	1.00	4.00
Information Workplace readiness	15%	2.93	2.10	2.25	4.35	2.75	3.93	3.05	3.58	2.33	2.33	2.23
STRATEGY	50%	2.51	2.18	2.86	4.34	2.18	5.00	2.67	3.85	3.00	2.51	2.18
Executive vision and strategy	100%	2.51	2.18	2.86	4.34	2.18	5.00	2.67	3.85	3.00	2.51	2.18
MARKET PRESENCE	0%	2.58	1.15	2.85	5.00	1.78	5.00	2.78	4.35	3.88	1.33	1.43
Installed base	50%	1.40	1.00	2.60	5.00	1.40	5.00	1.60	4.00	3.20	1.00	1.00
Employees	15%	2.00	2.00	4.50	5.00	2.50	5.00	1.50	4.00	3.50	2.00	1.50
Partners	35%	4.50	1.00	2.50	5.00	2.00	5.00	5.00	5.00	5.00	1.50	2.00

All scores are based on a scale of 0 (weak) to 5 (strong).

Source: Forrester Research, Inc.

Two Vendors That Are Not Included In This Evaluation Show Strong Future Potential

In addition to the vendors identified in this collaborative platform Forrester Wave, two other significant vendors are in the process of re-entering the market with new product offerings. EMC Documentum has announced that its existing eRoom product will be replaced with a new Web 2.0-centric offering called Center Stage. Oracle has also re-entered the market, replacing its Oracle Collaboration Suite offering with Oracle Beehive. Both of these offerings were too new to have garnered the appropriate level of adoption for inclusion in this evaluation, but they are potentially important offerings in the space that require close attention. Google also continues to invest in functionality that Forrester believes will ultimately make it a relevant collaborative platform vendor.

VENDOR PROFILES

Leaders

- **Microsoft's bet on SharePoint pays off.** Microsoft has chosen an integrated suite approach for its collaborative platform offering and has packed functionality into MOSS 2007. The market has responded well to this approach. While the primary initial use case for SharePoint is often document workspace functionality, the suite approach generally leads to broader adoption of functionality including search, portal, an application development platform, business intelligence in the form of PerformancePoint Services, and basic content management. Microsoft offers only basic social capabilities in the current version, but don't expect that to persist with the upcoming version due out in early 2010.

- **IBM Lotus's investment in social moves the bar.** Building on a large installed base of Lotus Notes and Domino for collaboration, IBM Lotus has steadily introduced new products into the line. New collaborative platform capabilities came with Quickr, which offers basic content services and workspace capabilities and provides tight integration with IBM's higher-end CM8 and FileNet P8 content management offerings. IBM Lotus Connections marked an early entry into enterprise social tools, and that has helped keep the IBM Lotus offering at the head of the pack in functionality. IBM's modular approach will allow it to continue to introduce new functionality aggressively.

- **Novell rounds out its collaboration offering.** Novell has traditionally been a major player in the email and calendaring space, but it has lagged on the collaborative platform side. That changed with its acquisition of SiteScape, which was subsequently rebranded Novell Teaming. Teaming brings very strong capabilities for workspaces and collaborative application development, particularly in the area of workflow. Novell's latest release adds strong social capabilities to the offering and rounds out the functionality to move Novell into the Leaders' quadrant.

Strong Performers

- **MindTouch resonates with open source customers.** MindTouch represents a strong offering in the area of traditional collaboration and has addressed the Social Computing opportunity quite well. MindTouch benefits from being an open source offering with a large and active community behind the product. Introduction of new functionality is aggressive, as is expected with an open source offering. The open source community support moves MindTouch into a very strong position as a partner and provides customers with a wide array of add-on and integration offerings.

- **Open Text brings social to ECM.** Open Text has been in the collaborative platform market for a long time with products like Livelink, and it has recently upgraded its offering with the introduction of Open Text Social Media. While the offering has strong collaboration and social

capabilities on its own, it becomes particularly effective when matched with the Open Text ECM Suite. When the offerings are combined, the Social Media offering can be tightly integrated with the back-end ECM capabilities to provide end-to-end content and collaboration functionality. Open Text Social Media should be on the evaluation radar screen of Open Text ECM shops.

- **Atlassian leverages strong IT ties.** Some vendors focus on business users, some focus on IT. Atlassian is definitely in the latter category. Its Confluence offering has had very strong uptake that generally starts with IT and often with buyers who are already using Atlassian's JIRA offering for developers. While Confluence is still billed as a wiki product, Atlassian has invested in community capabilities. Additionally, Confluence is supported by a large plug-in library and is built on a highly customizable platform. The extensible nature of the product is a very compelling aspect. Confluence also offers prebuilt integrations to Microsoft SharePoint and Lotus Connections, allowing stronger co-existence in heterogeneous collaborative platform environments.

- **Jive Software looks to create a new market segment.** Jive has approached the collaboration market from the Social Computing perspective and has placed a very strong emphasis on community capabilities. With Jive SBS (formerly Clearspace), Jive looks to create a new industry segment for enterprise social software. This positioning allows it to compete, often effectively, with more traditional collaborative platforms. Jive is one of several vendors in this evaluation that warrants strong consideration when social tool sets are top of mind and traditional document- or email-based collaboration is secondary.

- **Socialtext brings the latest in social concepts to the enterprise.** Socialtext has focused on leveraging new and innovative content generation and communication capabilities from the open Internet and bringing them to the enterprise. Starting out as a wiki vendor, Socialtext was among the first to introduce social networking and most recently microblogging with its recent introduction of Socialtext Signals, which brings Twitter-like functionality to the enterprise. Each new piece of functionality integrates with and leverages the rest of the product offering. Socialtext focuses on providing business solutions and sells largely to business buyers. Like a number of vendors in this Forrester Wave, Socialtext focuses on social tools first. To that end, it provides integration with Lotus Connections and Microsoft SharePoint.

- **Traction Software looks to simplify collaboration.** Traction's TeamPage has been around for a decade and was a pioneer in applying blog and wiki constructs to the enterprise. Traction's goal was and remains simplifying knowledge worker communications and content generation. The result has been an offering that is now enterprise hardened and has seen strong adoption in highly rigorous verticals like government and pharma. Traction has remained committed to its vision of a simple collaboration platform with a user experience that will drive fast adoption — it should be on your shortlist where that meets your organizational collaboration goals.

Contenders

- **Cisco WebEx will be the right answer for some now, more later.** Cisco WebEx has long been highly relevant in real-time collaboration with its Web conferencing offering. With the introduction of WebEx Connect, Cisco WebEx now offers collaborative platform capabilities as well. As a new entrant in the space, Cisco WebEx has focused on providing basic workspace capabilities for sharing and collaborating on documents. These high-value capabilities can be easily and quickly provisioned through its SaaS-only offering. While the overall functionality is limited, the core value proposition of a document collaborative workspace is well executed and the user experience is simple and intuitive. Look to Cisco WebEx to build on this early effort by leveraging its SaaS delivery model to aggressively introduce new functionality.

- **Central Desktop aims to serve small and medium businesses and departments.** Central Desktop is offered in a pure software-as-a-service model and is attractive to organizations and departments that are looking to deploy quickly and easily without IT support. To that end, Central Desktop may lack some higher-end enterprise capabilities, but it's likely that those areas of functionality are not of interest to its target market.

SUPPLEMENTAL MATERIAL

Online Resource

The online version of Figure 3 is an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings.

Data Sources Used In This Forrester Wave

Forrester used a combination of two data sources to assess the strengths and weaknesses of each solution:

- **Product demos.** We asked vendors to conduct demonstrations of their product's functionality. We used findings from these product demos to validate details of each vendor's product capabilities.

- **Customer reference calls.** To validate product and vendor qualifications, Forrester also conducted reference calls with two of each vendor's current customers.

The Forrester Wave Methodology

We conduct primary research to develop a list of vendors that meet our criteria to be evaluated in this market. From that initial pool of vendors, we then narrow our final list. We choose these vendors based on: 1) product fit; 2) customer success; and 3) Forrester client demand. We eliminate vendors that have limited customer references and products that don't fit the scope of our evaluation.

After examining past research, user need assessments, and vendor and expert interviews, we develop the initial evaluation criteria. To evaluate the vendors and their products against our set of criteria, we gather details of product qualifications through a combination of lab evaluations, questionnaires, demos, and/or discussions with client references. We send evaluations to the vendors for their review, and we adjust the evaluations to provide the most accurate view of vendor offerings and strategies.

We set default weightings to reflect our analysis of the needs of large user companies — and/or other scenarios as outlined in the Forrester Wave document — and then score the vendors based on a clearly defined scale. These default weightings are intended only as a starting point, and we encourage readers to adapt the weightings to fit their individual needs through the Excel-based tool. The final scores generate the graphical depiction of the market based on current offering, strategy, and market presence. Forrester intends to update vendor evaluations regularly as product capabilities and vendor strategies evolve.

ENDNOTES

[1] The social networking effect on collaboration has been significant. For a more in-depth analysis of the phenomenon, see the April 30, 2008, "Social Computing Changes The Enterprise Collaboration Landscape" report.

[2] SharePoint adoption has been strong since the introduction of Microsoft Office SharePoint Server 2007. In Forrester's March 2008 North American And Western European Enterprise Microsoft Office 2007 Adoption Online Survey, the question, " Which of the following best describes your organization's time for implementing or upgrading to Microsoft Office SharePoint Server?" resulted in 24% answering "immediately" and 41% answering "within six months".

[3] Collaboration in a cloud model is becoming increasingly accepted for organizations that need or wish to bypass the requirements of an on-premise implementation. For small and medium businesses, this is a particularly compelling option. For a more in-depth analysis of cloud-based collaboration, see the March 18, 2008, "Get Ready For Collaboration In the Cloud" report.

FORRESTER®

Making Leaders Successful Every Day

Headquarters

Forrester Research, Inc.
400 Technology Square
Cambridge, MA 02139 USA
Tel: +1 617.613.6000
Fax: +1 617.613.5000
Email: forrester@forrester.com
Nasdaq symbol: FORR
www.forrester.com

Research and Sales Offices

Australia	Israel
Brazil	Japan
Canada	Korea
Denmark	The Netherlands
France	Switzerland
Germany	United Kingdom
Hong Kong	United States
India	

*For a complete list of worldwide locations,
visit www.forrester.com/about.*

For information on hard-copy or electronic reprints, please contact Client Support
at +1 866.367.7378, +1 617.613.5730, or clientsupport@forrester.com.
We offer quantity discounts and special pricing for academic and nonprofit institutions.

Forrester Research, Inc. (Nasdaq: FORR) is an independent research company that provides pragmatic and forward-thinking advice to global leaders in business and technology. Forrester works with professionals in 20 key roles at major companies providing proprietary research, customer insight, consulting, events, and peer-to-peer executive programs. For more than 26 years, Forrester has been making IT, marketing, and technology industry leaders successful every day. For more information, visit www.forrester.com.

FORRESTER®

47448