IDC MarketScape: Worldwide Collaboration and Community Applications 2021 Vendor Assessment
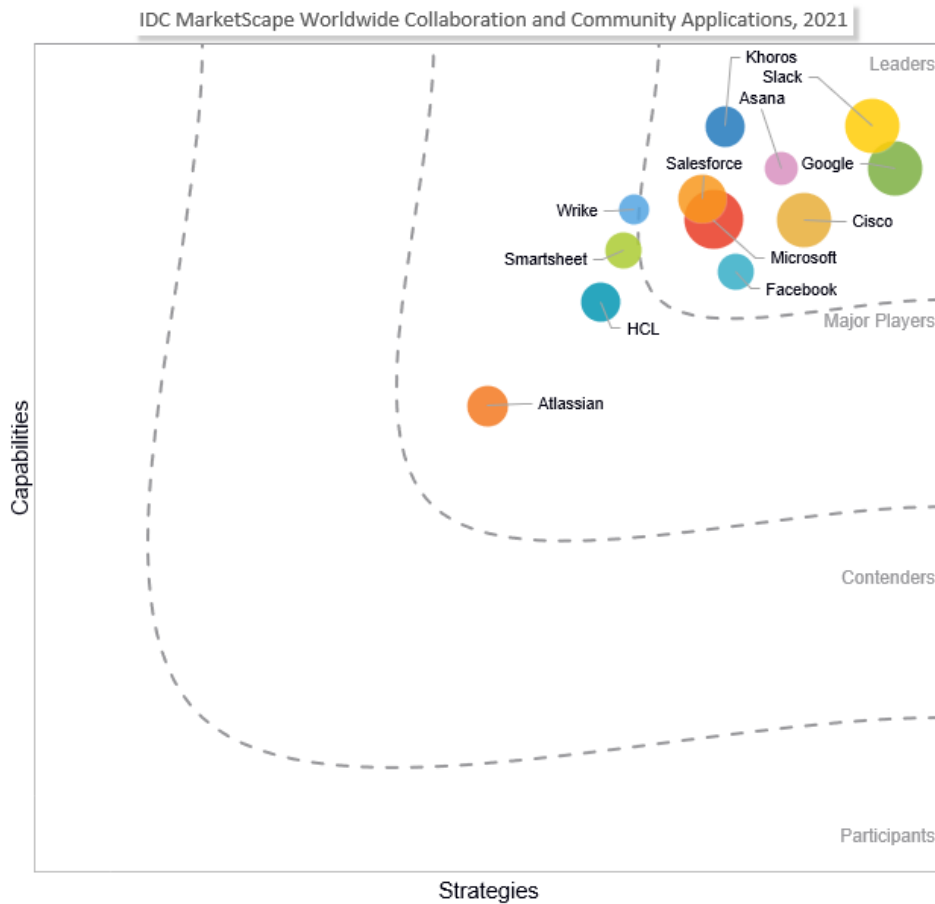
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THIS IDC MARKETSCAPE EXCERPT FEATURES: CISCO

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Collaboration and Community Applications 2021 Vendor Assessment

IDC MarketScape Worldwide Collaboration and Community Applications, 2021

Source: IDC, 2021

Please see the Appendix for detailed methodology, market definition, and scoring criteria.

IN THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Collaboration and Community Applications 2021 Vendor Assessment (Doc #US46743820e). All or parts of the following sections are included in this excerpt: IDC Opinion, IDC MarketScape Vendor Inclusion Criteria, Essential Guidance, Vendor Summary Profile, Appendix and Learn More. Also included is Figure 1.

IDC OPINION

This study applies the IDC MarketScape methodology to evaluate major global collaborative and community platform vendors.

As the pandemic drove the increased need for collaborative technologies, three primary categories emerged: team collaborative applications, team collaborative applications with native work management, and enterprise communities – community management platforms that connect within and outside the enterprise. For this document, IDC identified leaders in the team collaborative applications and enterprise community functional markets. In detail:

- The collaborative applications market has become essential to connect a digital workforce to their colleagues and work, regardless of where they work.
- Collaborative and community products are connecting both internal workers and partners and customers.
- With an intense feature velocity, vendors are distinguishing themselves as unique, while integrating with other products to help drive seamless workflow and improved metrics.
- Enterprises of every size are centralizing work and communications on team collaborative and community platforms.
- These platforms, unlike email, keep relevant conversations with meeting assets in one place, saving considerable time while encouraging other voices to be heard, driving better results.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

This IDC MarketScape looks at team collaborative applications and enterprise community application vendors. The criteria for inclusion are as follows:

- Vendors must have appeared in IDC's 2019 and 2020 market share research documents as a top 10 worldwide vendor in the collaborative applications market share, the team collaborative applications market share, or the enterprise communities (enterprise social networks) market share documents.
- Vendors must offer a proprietary product with the primary purpose of enabling or fostering collaboration and/or communities for a line of business or an enterprise.
- Vendors must have a presence in the United States and at least one other country.
- Vendors must sell to at least three global regions.
- Products in this study were reviewed as they were in general availability as of August 1, 2021.

ADVICE FOR TECHNOLOGY BUYERS

- Customers need their collaborative applications to support the APIs of the vendors they use, including CRM, HRIS, and their marketing technology stack. The business goals are more consolidated data, greater employee, partner and customer experience (CX), and machine learning (ML) to drive new and better outcome-based metrics.

- Vendors responded to the events of 2020 with massive feature velocity. This shows little sign of abating over the next few years.

- Customer support is lacking for some vendors, in part due to the explosive growth in the market. Communities of customers, where they exist, help deflect the support needs and create brand loyalty.

- Many vendors started adopting a greater role for partners to be the first line of sales and support; this is meeting with widely varied and mixed results. Several customers interviewed voiced that the partners may not be using the applications they are selling, creating a knowledge and support gap. Customers want to buy and get support online, have a community of users available to them, and want to be able to alter their offering based on emerging needs.

- Enterprises are asking for longer term, continuous road maps, and product updates. Companies that deliver annual or biannual updates have an optics challenge of being less innovative.

- Ease of online purchasing, enterprise package customization and deployment, and customer onboarding and support are challenges for many but not all vendors. Customer experience is an imperative. Simplify these areas.

- Customers voiced the needs for better APIs for many (but not all) products, as well as more help executing change management to be more collaborative.

- Customers expressed the need for real-time translation and support for multiple global regions.

VENDOR SUMMARY PROFILES

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

Cisco

Cisco is positioned in the Leaders category in this 2021 IDC MarketScape for worldwide collaboration and community applications.

The Webex platform has been part of the Cisco portfolio for over a decade. In 2020, Cisco started treating the Webex business as the independent entity it should have always been. The result was over 800 new targeted features in an eight-month period and a commitment to continued investment in the platform. While best known for videoconferencing, Webex offers an enterprise messaging product with group messaging capabilities where teams can chat, coedit documents (based of integrations), collaborate with internal and external participants, schedule meetings, and access recordings and transcriptions.

Webex Customer Success Managers provide onboarding and training resources targeted at specific industry verticals and job functions. This provides onboarding and long-term adoption and learning. They also provide tools for IT admins to measure the success of adoption and engagement of meetings, messaging, and calling workloads in the Webex app.

In June 2021, new, easier-to-purchase pricing configurations bundles include calling, messaging, meetings, polling, and events.

Strengths

- Strong security "built in" story with zero trust security and real-time data loss prevention
- Integrations with other applications such as Slack and Microsoft Teams, while creating Spaces within Webex for teams to meet
- Internal and external collaboration abilities
- Partnering with clients to improve the culture of collaboration and resolve adoption challenges
- Acquisitions covering AI, automation, and engagement already adding to the solution

Challenges

- Metrics are rich but focus on adoption rather than outcomes.
- Cisco has had good name recognition with the C-suite for a long time. Now that purchasing occurs through multiple line-of-business leaders and staff, and a reintroduction is in order. Cisco has started an awareness ad campaign to start to rectify this.
- Webex has refreshed the product and messaging several times in the past two years. Still, the core product has been consistent and reliable.

Consider Cisco When

Consider Cisco Webex as a solution when you may be using or considering additional Cisco products in the workplace. Security and interoperability with hardware and software is a plus.

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

Using the leaders in these markets created a very mature picture of the market. These were among the companies that "stepped up their game" to meet the emerging needs of 2020, and beyond. Even the least mature product in this grouping became mature and very stable. This created a challenge in the visual of the IDC MarketScape graph (refer back to Figure 1); however, we have clarified in the Vendor Summary Profiles section for each vendor.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market Definition

Collaborative Applications

Collaborative applications enable groups of people to work together by sharing information, communications, and frequently processes. Definitions of collaborative applications markets are presented in the sections that follow.

Enterprise Community Applications

Enterprise community applications enable social collaboration capabilities to users that are either inside or outside an organization's firewall. Solution capabilities should include, but are not limited to, activity streams, blogs, wikis, microblogging, discussion forums, groups (public or private), ideas, profiles, recommendation engines (people, content, or objects), tagging, bookmarking, and online communities. An enterprise community application provides a social collaboration or relationship layer in a business that can be a discrete standalone solution and/or a set of service-oriented application programming interfaces (APIs) or integrated applications that coexist with other business and communications applications. Discrete solutions may support one type of social functionality (such as online communities, ideation, or innovation management) or a broad-based platform that encompasses many functionality traits.

Team Collaboration Applications

Team collaboration applications (TCAs) provide a workspace and an integrated set of web-based tools for an ad hoc, unstructured, asset-centric, or document-centric collaboration between groups or individuals between known domains. A TCA can be represented by secure "channels" or "rooms" that contain documents, chat history, and transaction history to maintain a persistent auditable history or a more multipurpose shared workspace where users are able to store, access, and share files. Administration is primarily performed by a known user (that governs access rules), but IT administration controls/management may also be possible. TCA solutions may also allow directory integration, policy management, and integration with social collaboration tools (content shared within the social context of newsfeeds or groups). Communication within the TCA environment is mostly asynchronous, business to business (B2B), and closed to a specific set of eyes.

Related Research

- *Worldwide Collaborative Applications Forecast, 2021-2025* (IDC #US48061821, July 2021)
- *Worldwide Collaboration Applications Market Shares, 2020: The Year of Mass Adoption* (IDC #US48061921, July 2021)
- *IDC's Annual Collaboration Survey, 2021* (IDC #US46305621, May 2021)
- *IDC Conferencing Applications and Virtual Events Survey 2021: New Expectations* (IDC #US47693821, May 2021)
- *The Rapidly Evolving Future of Collaboration and Conferencing* (IDC #DR2021_FoW_WK, March 2021)
- *Market Analysis Perspective: Worldwide Collaborative Applications, 2020* (IDC #US45918920, September 2020)

Synopsis

This IDC study represents a vendor assessment of the collaborative and community applications market through the IDC MarketScape model. Team collaborative applications and enterprise community applications became critical to connect workers, vendors, partners, and customers. Each vendor has differentiated itself with both core abilities and integration abilities that they believe will be most in demand in the future. While some companies saw customer service challenges in their growth, all are seeking better ways to improve adoption to make collaboration and communities a core part of the enterprise IT stack going forward. If user adoption of these platforms is any gauge for the future, collaborative and community platforms will be very successful. Enterprises must embrace them as a new way to communicate, form community, improve customer and worker experience and, most importantly, redesign legacy processes.

"The future of business is the connection and communities with the workforce, partners, and customers," according to Wayne Kurtzman, research director for Social, Communities, and Collaboration Applications at IDC. "Deep integrations with the rest of the technology stack improve insights, minimize context switching, and drive significantly more productivity with better worker experience. Companies that fail to provide well-designed collaboration and community platforms will force their workforce, partners, and customers to create their own solutions."

About IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications and consumer technology markets. IDC helps IT professionals, business executives, and the investment community make fact-based decisions on technology purchases and business strategy. More than 1,100 IDC analysts provide global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries worldwide. For 50 years, IDC has provided strategic insights to help our clients achieve their key business objectives. IDC is a subsidiary of IDG, the world's leading technology media, research, and events company.

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