

# Ovum Decision Matrix: Selecting an Enterprise Social Networking Product, 2016–17

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## Summary

### Catalyst

Businesses and institutions depend on the cooperation of employees and teams to function and compete; thus, organizational life is inherently social. Individuals often turn to their colleagues for advice, information, and inspiration, hence the saying, "It's not what you know but who you know that matters." Enterprise social networking provides a connective medium to facilitate and develop this kind of "knowingness" and harness it for the benefit of the organization.

Connected employees are much more likely to communicate, engage, organize, cooperate, share, and build communities than those that are not. These fundamental behaviors drive business growth and progress, so business leaders are constantly seeking better ways of amplifying the productive social behaviors of the workforce.

Enterprise social networking functionality, whether embedded in line-of-business applications, enterprise portals, productivity tools, or collaboration platforms, enables individuals and teams to develop "social capital" (connections, goodwill, and tangible/intangible resources), which in turn enables flexible, opportunistic engagement and high levels of cooperation within the workplace, especially among those that might not otherwise become acquainted.

As the market transitions through eager and proactive communities toward more pragmatic and somewhat skeptical IT buyers, this Ovum Decision Matrix examines the leading players in the market and assesses their relative strengths and weaknesses. This report also explores the future of enterprise social networking as new offerings enter the market and workstyles change.

### Ovum view

Despite significant investment in enterprise collaboration solutions, email continues to be the default electronic communication medium within most enterprises. Email is certainly a useful medium when it comes to interacting with individuals and exchanging information within small groups, but as the number of participants grows, there comes a point when email becomes clumsy, inefficient, and unproductive. We all know what this looks like, and we can generally spot the "breaking point," so the way in which employees deal with this breaking point, or preempt it by switching to other tools and collaboration mediums, is likely to determine business process efficacy and operational prowess.

Enterprise social networking products, in whatever guise they might take, are designed to facilitate and structure mass communication, cooperation, and collaboration communities, and to surface the information that flows through them in timely and pertinent ways. As such, this genre of product warrants the attention of business leaders, CIOs, corporate communication departments, and proactive employees. Ovum has monitored the enterprise social networking landscape for nearly a decade, and our research suggests that this category of software has not yet reached the "late majority" stage of market adoption, which means that a sizable part of the addressable market is still seeking insight and business value.

Products designed for very large enterprises are no longer dominating the workplace collaboration market. Instead, a variety of cloud-native, mobile-first communication and collaboration products are attracting the attention of "movers and shakers." However, it should be noted that many of these

products were designed with small teams and groups in mind, so organizations should consider how these might scale in terms of enterprise functionality, utility, and manageability. Many enterprise products now exhibit "social capabilities," but enterprise social networking products are distinct in their ability to span entire organizations, providing an engagement platform that enables every employee, whether they be knowledge worker, service worker, or manual worker, to connect and participate, contribute and collaborate, and cooperate and engage.

All the products presented in this Ovum Decision Matrix (ODM) have something unique to offer, so we recommend that organizations review the more detailed standalone SWOT assessments that have been summarized in this report. Available as a separate tool, the Ovum Interactive Decision Matrix (OIDM) enables organizations to model their requirements, add feature weightings, and compare product suitability. Used together, these resources provide business and IT decision-makers with facts, insights, and market intelligence, thereby reducing the effort required to assess the market and shortlist potential products and solutions. These resources also provide vendor strategists and product managers with crucial insight into competitors and the influential offerings of large enterprise software service providers.

## Key findings

- Ovum Decision Matrix leaders IBM and Jive Software offer mature, well-established enterprise social networking products that address the needs of business users and IT departments.
- Comparative analysis reveals that IBM Connections is marginally stronger than Jive in terms of overall end-user functionality, while Jive is slightly ahead in terms of overall IT management functionality.
- Neither IBM nor Jive Software can claim dominance in the broadest sense of the enterprise social networking market, as Microsoft Yammer and Salesforce Chatter appear to have almost ten times as many end users.
- Ovum Decision Matrix challengers MangoApps, Microsoft Yammer, and SAP Jam Collaboration are very different offerings from very different vendors.
- In terms of market segment, MangoApps targets midsize organizations, while SAP is generally associated with larger enterprises. Through its partners and service models, Microsoft Yammer is found across all industries and used by organizations of all sizes.
- MangoApps has been serving the modern intranet and collaboration needs of midsize organizations for the past six years, and it is frequently chosen because of the product's ease of use.
- Although Yammer was one of the first offerings to embrace the term "enterprise social networking," it has always tracked the essence, principles, and style of various popular consumer-oriented social networks.
- Ovum now considers SAP to be an established vendor in the collaboration and social intranet market.
- Ovum believes that large enterprises are unlikely to find a single enterprise social networking solution that suits the entire workforce, so an integrated approach might be a better option.

- Salesforce Chatter and Socialcast by VMware compare very favorably with the other products listed in this report, especially when viewed from the perspective of IT management functionality.

## Vendor product selection

### Inclusion criteria

Enterprise social networking is a general term used to describe collaborative platforms that promote and encourage openness, cooperation, and information sharing relating to business interests and activities. This report includes detailed analysis, evaluation, and comparison of seven products, all of which meet the following criteria:

- **The product identifies with the enterprise social networking market:** Products that exhibit clear enterprise social networking functionality, as detailed in the Social Features section of this Ovum Decision Matrix.
- **The product is relevant to Ovum's clients:** Vendors whose products featured in client enquiries, interviews, and advisory sessions.
- **The vendor and/or product is established in the enterprise market:** Products from start-up vendors that have been generally available for 36 months, or products from established vendors that have been generally available for 12 months.

### Exclusion criteria

The enterprise social networking market has matured markedly over the last three years, reaching the "early majority" phase of adoption. Several mergers and acquisitions had recently taken place when we produced our first *Enterprise Social Networking Ovum Decision Matrix*, so the intervening period has seen some significant product realignment as vendors redefine their product strategies in response to market demand and functional capabilities. In the last three years, "enterprise social capabilities" have been added to all manner of IT products and solutions, but it would be inappropriate to include these offerings in this report. The primary reasons for exclusion are as follows:

- **The vendor did not wish to participate in the report:** Vendors, for various reasons, do not always want to engage in analyst reports, especially if the emphasis of their product strategy has changed or the company is heading in a new direction.
- **The product has social features but these are not central to the core offering today:** Content collaboration vendors are adding "enterprise social" features to their offerings, but they are often found to partner (or integrate with) enterprise social networking vendors rather than competing head-to-head in this market. Some business application vendors offer enterprise social networking capabilities as an alternative to the more traditional tool-centered collaboration approach, but this functionality is not generally offered as a standalone commercial product.
- **The product is new to the market and is not yet commercially proven:** Project management, document collaboration, business intelligence, and real-time communication vendors are entering the enterprise social networking market with new and innovative products. These are covered by Ovum's *On the Radar* reports.

## Methodology

### Product assessment: Business-user features

In this assessment dimension, Ovum considers a series of data points that identify features of note and areas of product differentiation within the enterprise social networking market. Essentially, it is an assessment of end-user product functionality. Vendors were asked to complete Ovum's Enterprise Social Networking Features Matrix, comprising 107 product functionality data points divided into four categories:

- **Social features:** The product's core attributes as an enterprise social networking solution (26 data points).
- **Collaboration features:** The product's ancillary collaboration features and the extent to which it facilitates getting work done (23 data points).
- **End-user experience features:** The human-centered design features of the product, arguably the most important to the success, or otherwise, of an enterprise social networking project (38 data points).
- **Content management features:** The product's level of integration with and management of content-driven business activities and processes (20 data points).

### Product assessment: IT management features

In this dimension, Ovum considers a series of data points that identify features and functions that are important to those with responsibility for product implementation, management, support, and maintenance, such as CIOs, IT departments, developers, and integrators. Essentially, it is an assessment of enterprise "fit and finish." Vendors were asked to complete Ovum's Enterprise Social Networking Features Matrix, comprising 102 "enterprise fit" data points divided into three categories:

- **Deployment features:** Product deployment options (architectural and geographical) and the extent to which the offering coexists with, and adds value to, existing corporate IT systems and line-of-business applications (41 data points).
- **Administration features:** The manageability of the product in terms of user management, IT governance, information security management, compliance, and data analysis (34 data points).
- **Developer features:** The options open to corporate developers and independent software vendors in terms of APIs, standards support, platform ecosystem, and app marketplace (27 data points).

### Market impact

In this dimension, Ovum considers the global market impact of a product based on the assessment of six market indicators. This is the most challenging dimension to ascertain, as vendors continue to play their cards close to their chest, only sharing glimpses of business performance and sales data when it complements and supports their marketing message. Ovum has tracked the products detailed in this report over the last four years, so has a good insight into vendor progress and product adoption. The six categories relating to market impact are as follows:

- **Revenue:** Private companies seldom disclose revenues, and established enterprise vendors do not usually disclose product revenue unless it is substantial, sustainable, and commercially in their best interests to do so. Also, product and vendor revenue profiles continue to change

with market maturity and product packaging, so Ovum is cautious in its weighting of this factor.

- **Market competitiveness:** Ovum's examination of the enterprise social networking market includes a detailed look at the competitive landscape. Every vendor has a few competitors that it competes against on a regular basis, and Ovum's research methodology captures this information.
- **Customer deployments:** The potential business value of enterprise social networking products is proportional to the number of employees or network members that have access to them, so one must try to determine the extent to which end users are engaging on these platforms. Vendors provide only indicative numbers when talking about paying customers and total number of end users, so Ovum tempers these figures with publicly available data, such as mobile app downloads and installs.
- **Geographical penetration:** Where the information is provided, Ovum can establish the geographical reach of the product, both in terms of regional brand recognition and vendor presence. Data center locations, sales operations, and the provision of local support are also given merit.
- **Vertical industry penetration:** Some vendors provide industry-specific solutions and/or implementation expertise, while others partner with industry specialists and consultancies to extend their reach and range. Where provided, this information is considered along with other market impact indicators.
- **Market segment focus:** Small, medium, and large enterprises often have different business and technical requirements, and vendors deal with these segments of the market in different ways. Contract negotiation, bespoke service level agreements, customized support options, and tailored billing arrangements are important considerations for large companies and public sector organizations. Ovum considers the extent to which vendors are realistically able to address these different market segments.

## Ovum ratings

- **Leader:** This category is reserved for enterprise social networking products that score significantly above the combined group average. The primary metrics considered are those derived from an assessment of business-user and IT management product functionality as described in the Methodology section. Vendors appearing on this list do so based on Ovum's weightings and common enterprise requirements. Large organizations evaluating the enterprise social networking market should pay attention to products listed in this category as they generally rank above average in terms of enterprise readiness.
- **Challenger:** This category is reserved for enterprise social networking products that score on or around the combined group average. The primary metrics considered are those derived from an assessment of business-user and IT management product functionality as described in the Methodology section. Ovum recognizes the significance of market impact, but it is given less weighting because it is not an easily verifiable measure.
- **Follower:** This category is reserved for those enterprise social networking products that generally score below the combined group average. All dimensions and their constituent categories are included. Products appearing on this list do so based on Ovum's weightings and common enterprise requirements. Businesses and institutions evaluating enterprise

social networking solutions should consider the market and product strategies of the vendors associated in this category, as they may more closely align with the business and technical requirements of the organization.

## Ovum Interactive Decision Matrix

The Enterprise Social Networking Ovum Interactive Decision Matrix is an Excel-based modeling tool that enables detailed analysis and assessment of the enterprise social networking products featured in this report. It can be tailored and tuned to examine product suitability against key business and IT requirements. Access to this tool is via the Ovum Knowledge Center.

## Product and market analysis

### Ovum Decision Matrix: Enterprise Social Networking, 2016–17

The enterprise social networking market has changed significantly over the last four years. In 3Q13, Ovum analyzed 13 products and identified a common theme of "providing a Facebook for the enterprise." Today, as the market slowly transitions through early adopters toward the more skeptical buyer, some of the products we assessed in 2013 are now heading in somewhat different directions as the features typically associated with this product genre become almost commonplace. Moreover, the market appears to have come full circle, with Facebook itself entering the arena with its own offering called Workplace by Facebook, targeting businesses and institutions of all sizes.

"Social business" can be approached from various directions, and we find many of these represented in the products assessed in this report. Understanding the differences in direction and trajectory of these products is fundamental to the successful selection and implementation of an enterprise social networking solution. The products presented in this report represent a good cross section of what the market offers.

IBM Connections and Jive represent the "all-singing, all-dancing" segment of the market, as can be seen by their relative position in the top-right-hand corner of the ODM (see Figure 1). The offerings from Salesforce and SAP represent products that often form part of a "portfolio sale" or strategic investment in that vendor's enterprise applications. Yammer, as part of Microsoft Office 365, and MangoApps represent the notion of an "all-in-one" collaboration platform and enterprise social networking solution. Meanwhile, Socialcast represents a nascent shift in the market toward digital workspace solutions that embrace new models of end-user computing and styles of working.

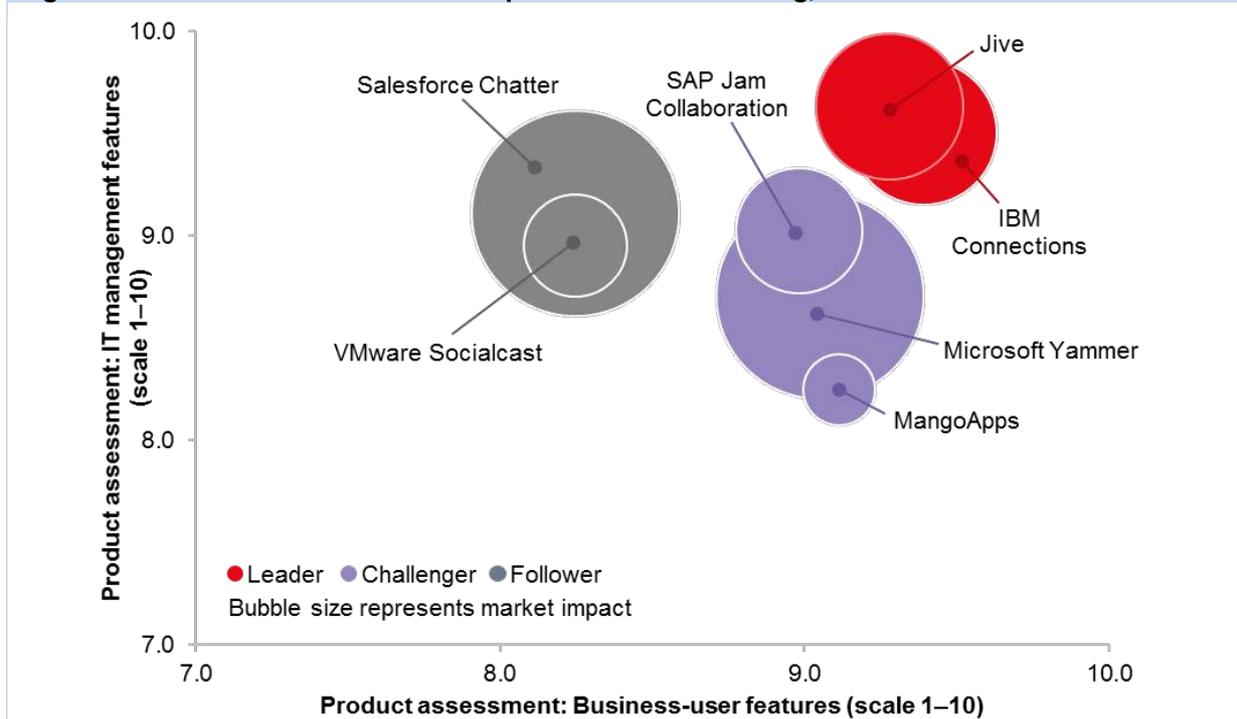
As always, the challenge for CIOs and IT managers is to identify the product or solution that best meets the organization's current and future requirements. These requirements are largely determined by the general needs of the business, factoring in IT strategy and associated considerations. However, executives and empowered employees also have influence. Indeed, if the business user is ignored or not consulted, then the adoption of another shadow IT product becomes likely.

Ovum has discussed the provision of enterprise social networking products with CIOs and IT managers across a broad cross section of industries. Although there is no universal pattern, it seems that small and midsize companies are finding it easier to adopt a single offering from established cloud-native providers, while larger enterprises still struggle with the challenge of on-premise versus cloud and the "one-size-fits-all" conundrum. Indeed, it is not that unusual to find a large enterprise

using different combinations of Jive, Yammer, and Chatter, especially where executives have sponsored divisional or business unit initiatives.

The tight scale used in Figure 1 reflects the maturity of the enterprise social networking product market, and the narrow gaps and overlaps highlight the small differences that now exist between offerings. It should be noted that Ovum's assessment model is of a general nature and is therefore indicative of a product's capabilities. An organization's unique business requirements and weightings may bring about a different arrangement when applied to the Ovum Interactive Decision Matrix.

**Figure 1: Ovum Decision Matrix: Enterprise Social Networking, 2016–17**



Source: Ovum

**Table 1: Ovum Decision Matrix: Enterprise Social Networking, 2016–17**

Leaders	Challengers	Followers
IBM Connections	MangoApps	Salesforce Chatter
Jive	Microsoft Yammer	VMware Socialcast
	SAP Jam Collaboration	

Source: Ovum

## Ovum Decision Matrix: Leaders

IBM Connections and Jive are mature, well-established enterprise social networking platforms, hence their relative positions in the Ovum Decision Matrix shown in Figure 1. Both products provide an excellent range of features and functions geared to meet the needs of a range of business users, and this is matched by their ability to satisfy IT management requirements, including deployment,

administration, and developer features. Not surprisingly, both vendors cite one another's products when asked to describe the competitive landscape.

Comparative analysis of the two products using Ovum's assessment criteria reveals that IBM Connections is marginally stronger than Jive in terms of overall end-user functionality, while Jive is slightly ahead in terms of overall IT management functionality.

The market impact of these vendors is almost the same, although adoption of IBM Connections appears to be growing at a faster rate if one uses mobile app downloads as a metric. This is not especially surprising, as IBM Connections offers a broader set of general collaboration functions than Jive.

Neither vendor can claim dominance in the broadest sense of the enterprise social networking market, as Microsoft Yammer and Salesforce Chatter appear to have almost ten times as many end users. With revenues of \$195.7m in 2015, Jive Software provides a hint as to the value of this market. IBM does not provide revenue figures for its Connections product line.

## **IBM Connections**

With information volumes doubling almost every year, IBM has recognized the need for a smarter workspace, one that can assist the business user by harnessing advancements in "cognitive computing" (i.e. natural language processing, analytics, machine learning). This notion of the "cognitive-infused workspace" is becoming central to IBM's collaboration product strategy, and those organizations gaining access to the power of IBM Watson, the company's "question answering machine," will be able to work with machine intelligence to outperform the competition and tackle more complex tasks.

## **Jive**

Jive provides enterprises with a unified user experience that can extend beyond a single organization or entity, making it invaluable to those organizations comprised of multiple different business units, ventures, or brands. An employee-centric software-as-a-service (SaaS) solution, the product lets business users decide which tools and apps to use to get work done. The Jive Interactive Intranet platform provides a collaboration hub built around profiles, blogs, groups, discussions, document collaboration, analytics, personalization, and smart search, delivered through purpose-built user experiences for desktop and mobile. ISO 27001:2013 certified, Jive offers enterprise-grade security and supports the most stringent, modern business requirements in terms of IT management, governance, development, and business reporting.

## **Ovum Decision Matrix: Challengers**

MangoApps, Microsoft Yammer, and SAP Jam Collaboration are very different offerings from very different vendors. In terms of market segment, MangoApps targets midsize organizations, while SAP is generally associated with larger enterprises. Through its partners and service models, Microsoft Yammer is found across all industries and used by organizations of all sizes.

## **MangoApps**

MangoApps has been serving the modern intranet and collaboration needs of midsize organizations for the past six years, and it is frequently chosen because of the product's ease of use. More than an enterprise social networking product, MangoApps represents a new breed of digital workplace platform, combining social intranet with team collaboration and instant messaging capabilities. No

single product can do everything, so it is pleasing to see that MangoApps already integrates with Salesforce, Slack, Box, GoToMeeting, Office 365, and more.

### **Microsoft Yammer**

Although Yammer was one of the first offerings to embrace the term "enterprise social networking," it has always tracked the essence, principles, and style of various popular consumer-oriented social networks. This means that the product is usually familiar to new users, and hence adoption is often viral in nature. Slowly but surely, Yammer is being folded into the Office 365 stack, and integration with Office productivity apps, mobile apps, and line-of-business apps (such as Dynamics CRM) makes Yammer a comprehensive social collaboration solution.

### **SAP Jam Collaboration**

Ovum now considers SAP to be an established vendor in the collaboration and social intranet market. Product focus continues to be on line-of-business and company-wide use cases, albeit with ambitious plans to harness the combination of bots and web hooks to integrate with real-time messaging solutions, such as Slack and HipChat, plus voice-based interfaces. SAP Jam Collaboration is addressing modern business challenges by connecting employees with role-relevant updates and information.

## **Ovum Decision Matrix: Followers**

Salesforce Chatter and Socialcast by VMware compare very favorably with the other products listed in this report, especially when viewed from the perspective of IT management functionality. Ovum's detailed assessment of end-user functionality places these offerings behind those listed above, but only marginally so (see Figure 2). In terms of market impact (see Figure 4), Chatter ranks as high as any product assessed in this report, while the strength of Socialcast can be seen in its deployment features.

### **Salesforce Chatter**

Organizations that have adopted Salesforce CRM should give Chatter full consideration as they assess enterprise social networking requirements. Ovum believes that large enterprises are unlikely to find a single enterprise social networking solution that suits the entire workforce, so an integrated approach might be a better option. Event streams produced by Chatter can be consumed in other applications, thereby enabling organizations to adopt a mix-and-match approach as befits the initiative or business opportunity. Salesforce Communities brings an additional dimension to enterprise social networking, enabling organizations to collaborate with their customers and partners across marketing, sales, and service activities.

### **Socialcast by VMware**

VMware differentiates the business value of Socialcast primarily through product packaging and pricing. VMware also has a very strong relationship with IT buyers through its 75,000 partners. The Socialcast mobile app integrates with the suite of Workspace ONE productivity apps for single sign-on and workflows, and Content Locker integration allows content-centric business activities to be simpler on mobile devices than on desktops and laptops. Socialcast also integrates with existing business systems so that teams can work and collaborate more easily.

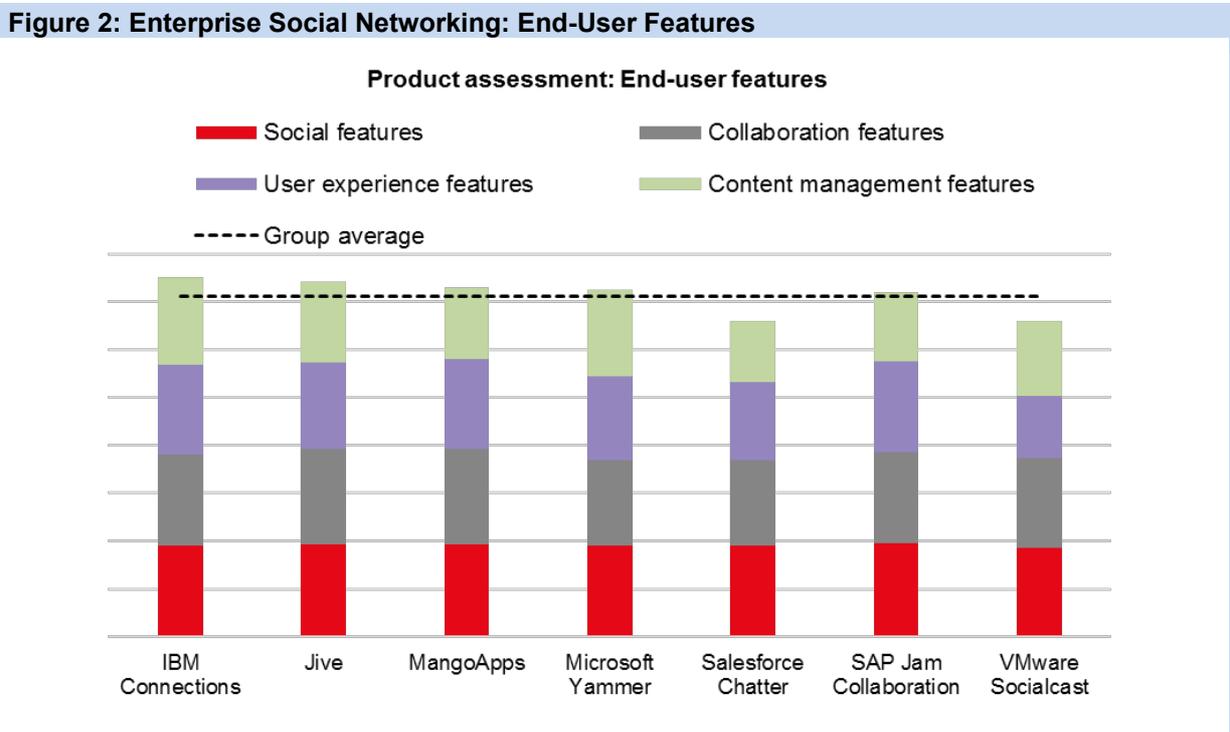
## Market outlook and emerging vendors

The world's workforce is not homogenous, with every country and every industry presenting a different workforce mix. Information technology solutions, including electronic communication and collaboration systems, have traditionally targeted the knowledge worker and, more recently, service workers through enterprise mobility initiatives. Manual workers have, for the most part, been left out of the loop because they are not "digitally connected" to the workplace, its processes, and its communication channels. However, affordable smartphones, pervasive wireless networks, and powerful cloud services are now able to connect the millions of manual workers employed in agriculture, accommodation, hospitality, transport and storage, wholesale and retail, construction, and manufacturing.

Launched in October, Workplace by Facebook is now generally available to any business or institution that wants to use it. Previously known as Facebook at Work, Workplace has been in customer beta for 18 months and has attracted companies such as RBS, Yes Bank, Danone, Telekom Austria Group, Financial Times, Telenor, and Booking.com. Described by Facebook as "a communications platform that helps organizations collaborate and get more done," the company must convince business and IT decision-makers that this new offering is different and/or better than products detailed in this report. Moreover, Facebook will need to develop the support infrastructure, go-to-market channels, and business partnerships that are so essential for success in the enterprise market.

## Product evaluations and comparison

### Product assessment: End-user features



Source: Ovum

Any organization adopting an employee engagement platform should do so with business innovation and process improvement in mind. New functionality will continue to emerge as start-ups and established enterprise vendors build "next-generation" collaboration platforms, but care should be taken in adopting new "enterprise" products that appeal only to the few rather than the many. Some of these offerings will undoubtedly be derivative works in terms of functionality and approach, but their value and appeal may well appear from other dimensions.

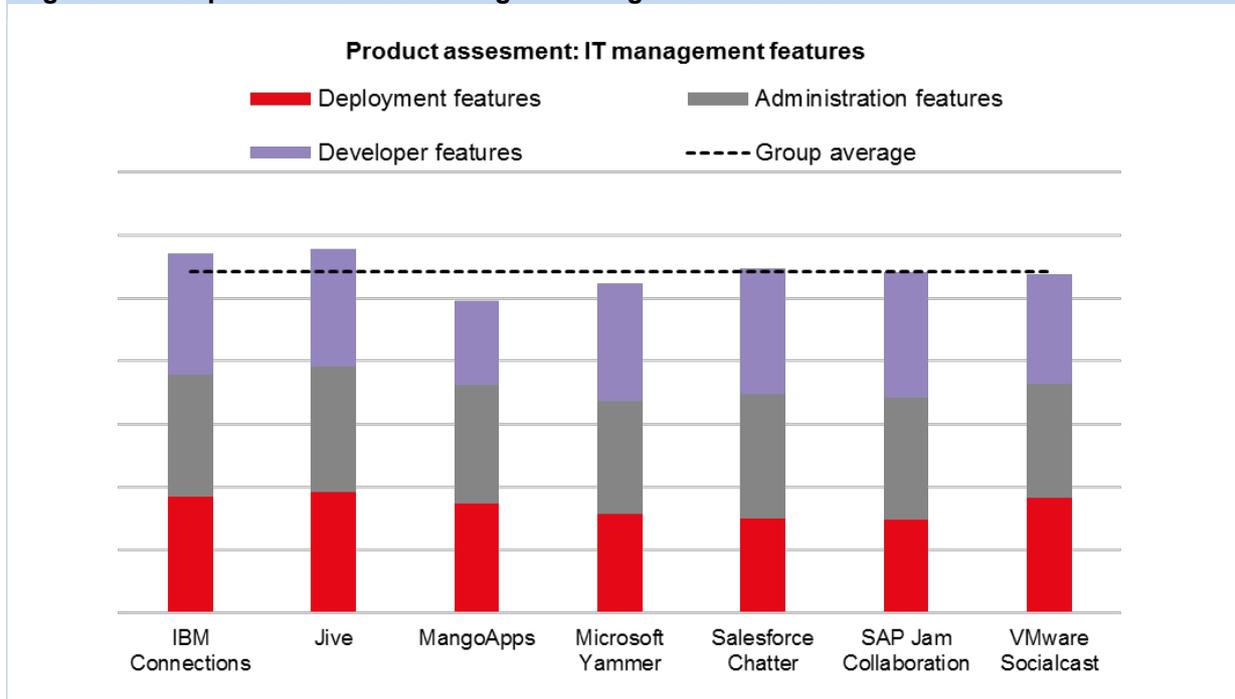
Figure 2 shows the extent to which the products presented in this report measure up against one another in terms of functionality offered to the end user. The dotted black line marks the combined group average, revealing products that, in Ovum's assessment, currently offer above-average functionality. As can be seen from the chart, overall differences in end-user functionality are relatively minor using Ovum's assessment criteria, so organizations should use the Ovum Interactive Decision Matrix to determine which products are most likely to satisfy business-user requirements.

In terms of overall end-user functionality, IBM Connections and Jive narrowly lead the group, followed closely by MangoApps and Yammer. Looking at each category of functionality separately reveals different product strengths:

- Social features: SAP Jam Collaboration
- Collaboration features: Jive, MangoApps
- User experience features: SAP Jam Collaboration
- Content management features: IBM Connections

## Product assessment: IT management features

**Figure 3: Enterprise Social Networking: IT Management Features**



Source: Ovum

Ovum believes that organizations should avoid fixating solely on features as the primary means of selecting an enterprise social networking solution. In the consumer world, the most important aspects

of any social software are the value and utility it affords to the individual, as these drive adoptions. So, while a business unit might plan to use social software to improve aspects of its business performance, the initiative will flounder if it provides no apparent benefit to the workforce. However, governance, risk, and compliance requirements cannot be ignored, hence the need for strong IT management and administration features.

Organizations, especially large enterprises, evaluating enterprise social networking products must be mindful of the deployment, administration, and support burdens that these systems place on the corporate IT department. Even products offered as software-as-a-service have an overhead, which could be significant if issues such as information governance and user management are not carefully considered. Deployment options vary considerably among the products presented in this report.

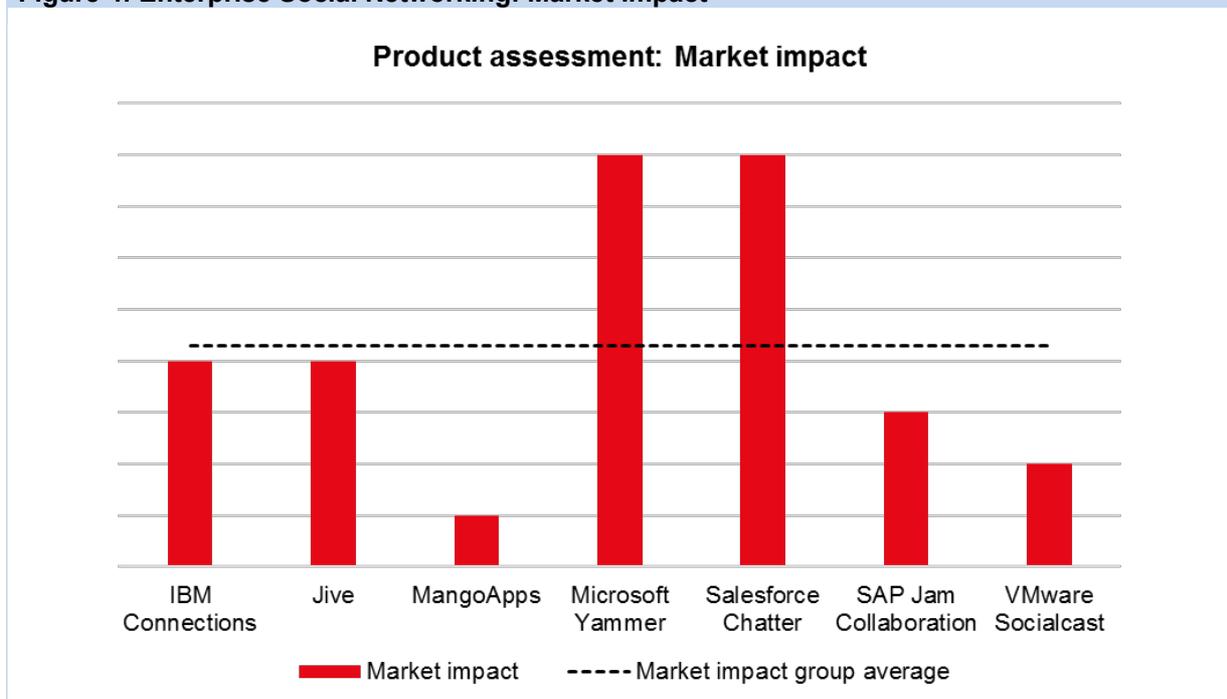
Figure 3 shows the extent to which the products presented in this report measure up against one another in terms of IT management features. The dotted black line marks the combined group average functionality, revealing products that, in Ovum's assessment, currently offer above-average functionality. As can be seen from the chart, overall differences in end-user functionality are relatively minor using Ovum's assessment criteria, so organizations should use the Ovum Interactive Decision Matrix to determine which products are most likely to satisfy IT management requirements.

In terms of overall IT management functionality, IBM Connections and Jive once again lead the group. Looking at each category of functionality separately reveals different product strengths:

- Deployment features: Jive
- Administration features: Jive
- Developer features: Salesforce Chatter, SAP Jam Collaboration

## Product assessment: Market impact

**Figure 4: Enterprise Social Networking: Market Impact**



Source: Ovum

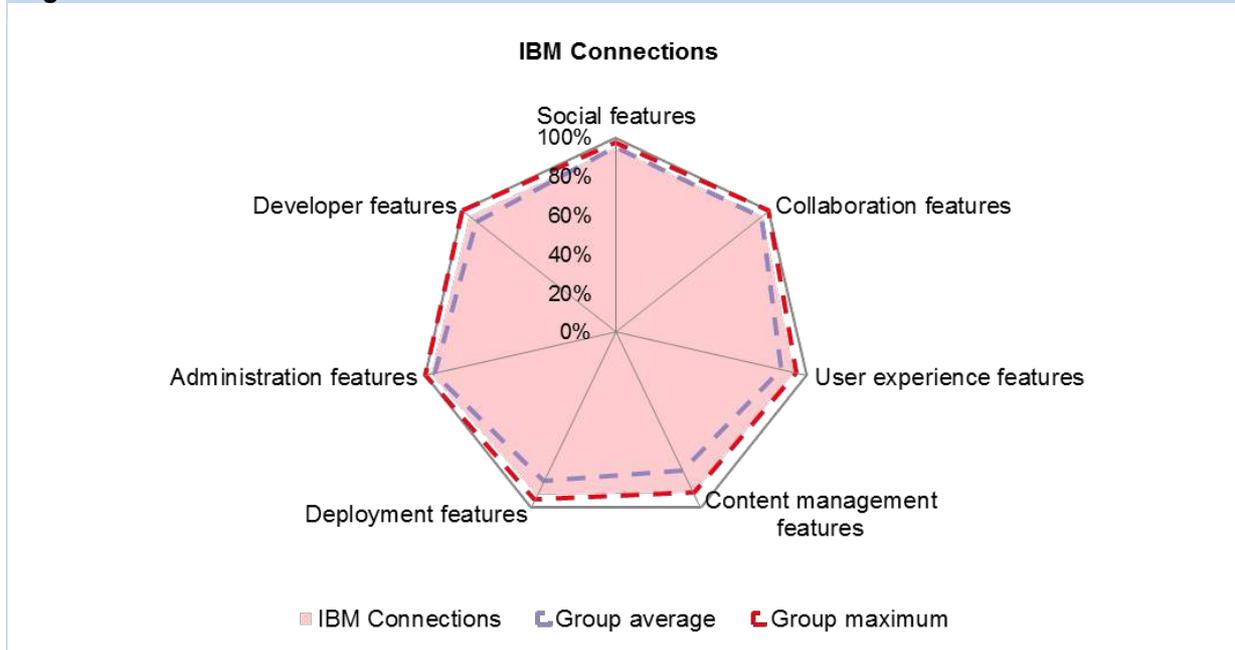
Figure 4 shows the extent to which the vendors and their products measure up against one another in terms of market impact. The dotted black line marks the combined group average, and thus reveals the products having the largest impact on the enterprise social networking market. Product revenues, customer deployments, and usage statistics are difficult to measure and compare, although Jive Software provides a somewhat useful yardstick as it is a public traded company focusing primarily on enterprise social networking and interactive intranets market. Jive reported revenues of \$195.8m for the 12 months ending December 31, 2015, but the company's income statement shows just how challenging it is to make significant profit even with a great enterprise social software product.

Comparing data obtained from Google Play in 3Q13 with data from 3Q16, we see that Android app installs for IBM Connections, Microsoft Yammer, and Salesforce Chatter grew by approximately ten times. Chatter and Yammer currently stand at between 1,000,000 and 5,000,000 installs. IBM Connections currently stands at between 100,000 and 500,000 installs. Chatter and Yammer are available as cloud-based freemium products, and this has clearly helped them build market share. However, the fortunes of these products are now pretty much tied to their parent cloud platforms and each vendor's portfolio of products, effectively locking customers into these vendors.

## Product analysis

### IBM Connections: Ovum Decision Matrix – Leader

Figure 5: IBM Connections Cloud



Source: Ovum

### Ovum SWOT assessment

#### Strengths

**An effective engagement and collaboration platform for business professionals and large enterprises**

IBM Connections unites a variety of collaborative capabilities into a single offering, including user profiles, communities, file management, blogs, and wikis. Real-time communication features are also available, including chat, meetings, voice, and video. A best-in-class product in terms of features and functions, IBM Connections can be integrated with existing systems and line-of-business applications using in-house resources or working with IBM's partner ecosystem. Third-party components have also been developed to extend the reach and range of the core offering.

#### **Available on cloud, on-premise, and as a hybrid configuration**

Delivered on cloud, on-premise, or as a hybrid solution, IBM Connections can integrate with existing IT investments, including Microsoft SharePoint. The product supports more than 30 languages to provide global reach, and organizations that adopt IBM Connections are assisted in the migration of data and users into the platform as part of the implementation. For large or complex environments, IBM Software Services can be engaged to provide customer-specific solutions.

#### *Weaknesses*

##### **No social network should be an island**

IBM Connections is replete with features and functionality, and can accommodate a range of business scenarios and use cases, but these could be extended further by better integration with social media, especially LinkedIn, Twitter, and Facebook. These networks are being used by organizations to engage with customers and by business professionals to engage with peers, so native connections and integrations would seem to be a natural next step.

##### **Limited integration with third-party e-discovery tools**

The electronic discovery reference model (EDRM) was created to standardize e-discovery, and it is becoming increasingly important for organizations operating in regulated industries. IBM supports the process of e-discovery by integrating IBM Connections with IBM Content Collector, which includes eDiscovery Manager. Customers can also work with two IBM partners, OpenQ and Actiance.

#### *Opportunities*

##### **IBM Connections and Verse for the professions**

The professions have traditionally been a very conservative segment of the knowledge worker market when it comes to the adoption of cutting-edge technology, but the digital transformation wave is already bearing down on doctors, lawyers, accountants, tax advisers, management consultants, and architects. The world is transitioning from a "print-based industrial society" to a "technology-based Internet society," so the professions need to find better ways to externalize their knowledge and expertise as digital services. IBM Connections (in conjunction with Verse, IBM's next-generation email and calendaring application) is well suited to support the "networked experts" business model found in the professions, and the addition of IBM's cognitive computing capabilities would increase the appeal of this offering even further.

##### **Connecting IBM Connections to the LinkedIn network would extend the product's reach for many business professionals**

LinkedIn is the world's largest professional network, but it falls short when networked professionals want to collaborate and work together in virtual teams. IBM has an opportunity to enhance the value and utility of its product through what Ovum calls the "compound network effect," wherein the social

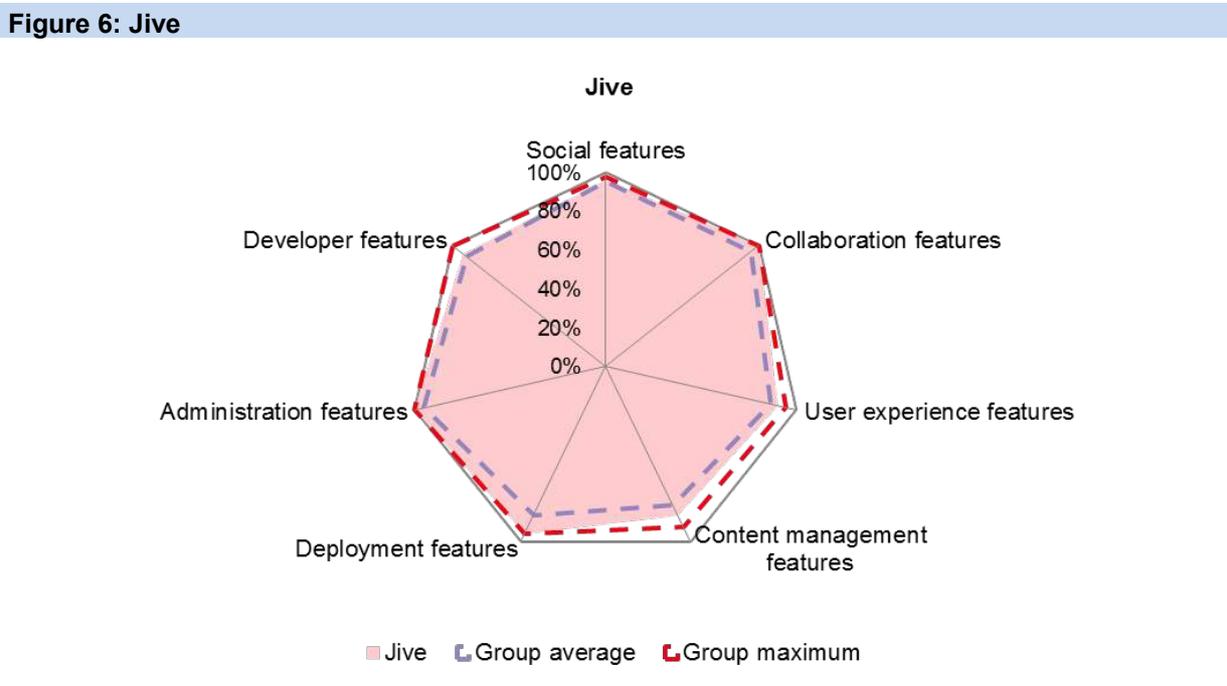
capital (connectivity, activity, and popularity within a social network) contained within one network is boosted by a different kind of social capital from another network.

**Threats**

**Facebook and Google continue their push into the employee engagement and enterprise collaboration market**

Jive Software is probably the closest competitor to IBM in the enterprise market, but Microsoft (with Office 365 and Yammer) is the seemingly unstoppable juggernaut in this domain. However, there are two other vendors that cannot be ignored: Google and Facebook. Google's G Suite (formerly Google Apps for Work) provides organizations with communication and collaboration tools, with Google+ presenting the business social networking capabilities. The launch of Workplace by Facebook signals a new and somewhat different kind of threat to IBM, albeit one that is not yet quantifiable or easily discernable.

**Jive: Ovum Decision Matrix – Leader**



Source: Ovum

**Ovum SWOT Assessment**

**Strengths**

**Making work searchable, visible, and memorable**

Mobile apps complement the rich web browser user experience. Value and utility can be driven across the enterprise by linking Jive to common business activities and functions, such as sales, customer service, and marketing. Bi-directional integrations with Office 365 and Salesforce let users work in their preferred business applications, while integrations with Box, Egnyte, and Google Drive complement Jive's rich social functionality. Jive continues to refine the look and feel of the product, finding new ways to surface information and insights.

**The product scales well across enterprise dimensions**

Jive's products have been deployed in many complex business environments and across all major industry verticals. Most Jive customers have more than 5,000 employees, but the product scales well above and below this number. Jive supports cloud-based SaaS, dedicated hosted, and on-premise deployment options, and is used by hundreds of millions of users globally. Jive works with a broad and extensive range of partners and has a strong route to market, with more than 40 resellers.

### *Weaknesses*

#### **Some organizations outside of North America and Europe have business requirements that favor in-country service provision**

Jive Software offers organizations exemplary administration features, but it has yet to offer customers the option of a multi-tenant hosted service outside of North America and Europe. Businesses and institutions in countries such as Australia and New Zealand are increasingly looking for local service options to minimize latency and maximize availability, while organizations in China and Asia have data sovereignty requirements that benefit from in-country providers.

#### **The next generation of Jive will enable users to work seamlessly across multiple communities**

Jive wants to take the capabilities that Interactive Intranet brought to the workplace to all of work, whether it is done inside or outside the company's traditional boundaries. In the future, organizations will be able to use Jive as a hub of business networks that will enable people to work seamlessly with external work partners. Also, the next generation of Jive will enable users to see insights, search, get recommendations, and work seamlessly across multiple communities.

### *Opportunities*

#### **New business models could provide Jive with a significant growth agent**

Jive Software has sales and marketing resources in all major geographies; however, the company's main areas of focus continue to be North America and EMEA. And while Jive sells across a range of industries, only the healthcare and government sectors have specific solutions. Jive has developed channel partnerships with 41 resellers, and it has technology partnerships to deliver solutions that extend and enhance Jive's products, but growth has not yet reached that "hockey stick" stage.

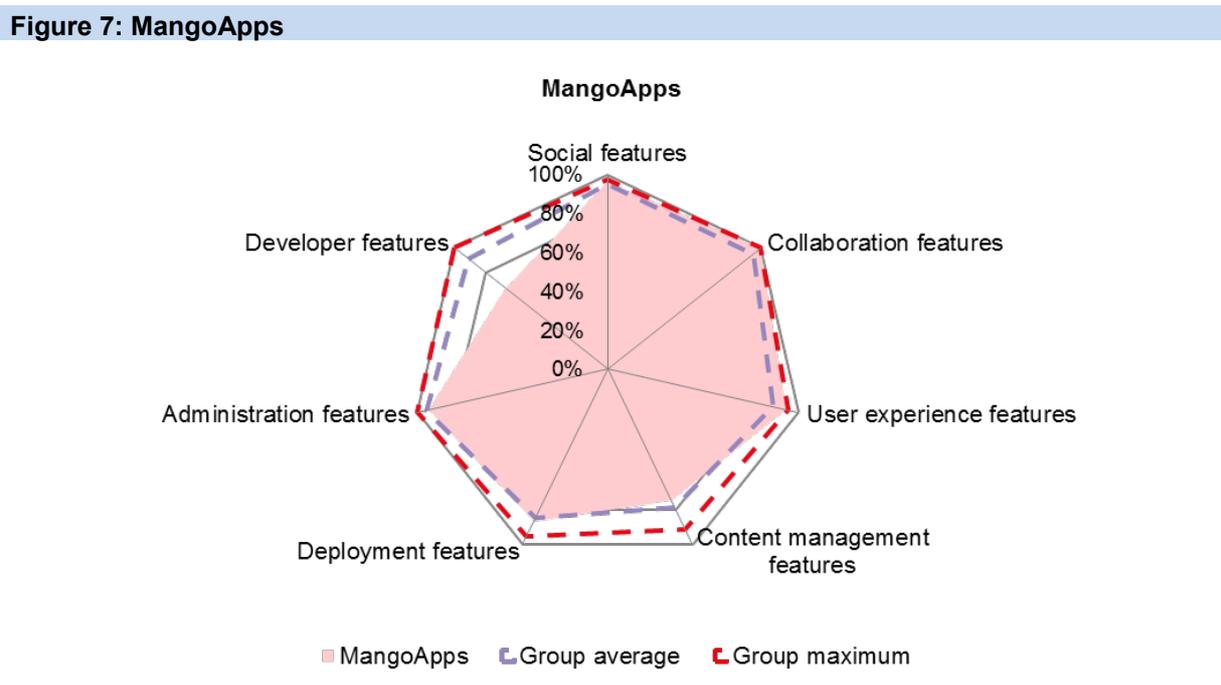
Jive needs to find a growth accelerator, and Ovum wonders if this might be found in new business models. The "networked experts" model, as described by Richard Susskind in [\*The Future of the Professions\*](#), presents an arrangement where "...professionals cluster, more or less formally, via online networks rather than in physical organizations." Jive is already being used today to standardize and systematize work, and it is well suited to the externalization of knowledge work and the sharing of expertise.

### *Threats*

#### **Facebook, Google, Microsoft, and Salesforce could obscure the value of Jive Interactive Intranet**

IBM, from the perspective of product functionality, is probably Jive Software's closest competitor in the employee engagement/enterprise social networking/social business market, but Microsoft, with Office 365, is playing a high-stakes game within the encompassing enterprise collaboration market. Salesforce, with Community Cloud, is also starting to present a threat to Jive, but the arrival of Facebook at Work (and the relaunch of Google for Work) could obscure the value that Jive offers enterprises.

## MangoApps: Ovum Decision Matrix – Challenger



Source: Ovum

### Ovum SWOT Assessment

#### Strengths

##### Excellent social collaboration features and user-centric design

MangoApps has been serving the modern intranet and collaboration needs of midsize organizations for the past six years, and it is frequently chosen because of the product's ease of use. MangoApps can be accessed through the web, desktop, or mobile app. The Getting Started Wizard and Information Page Tours help new users become oriented with the product. MangoApps integrates with Box, Dropbox, Google Drive, Microsoft OneDrive, Microsoft Office 365, and Microsoft SharePoint. The product also integrates with Salesforce.com, SugarCRM, and Zendesk.

##### Offered with a wide range of deployment options

MangoApps can be remotely installed on-premise by the vendor's technical team, or organizations can consume the service from one of five international locations (US, Europe, Asia, South America, and Australia). On-premise deployments can use Citrix, Microsoft, and VMware products to virtualize the Ubuntu-based technology stack. Hosted options include single-tenant and multi-tenant instantiations on public or private clouds. Administrators require no coding or technical skills, and as mobile device management features are built into the product, system administrators can remotely disable and/or wipe a specific lost or stolen device.

#### Weaknesses

##### Lacks e-discovery features

An increasing number of organizations require e-discovery features to support corporate governance requirements or legal hold when litigation issues arise. The ability to gather information pertaining to

specific employees or matters is a feature that can save administrators or company executives a significant amount of time and effort.

#### **No established developer community or ecosystem**

MangoApps has a fully documented public API, but the vendor has chosen not to build a developer ecosystem or online community. However, it should be noted that integrations are already included with popular tools such as Salesforce, Jira, Slack, Box, GoToMeeting, Join.Me, Sugar CRM, Zendesk, Google Analytics, Active Directory, Office 365, and more.

#### *Opportunities*

##### **The digital workspace is up for grabs**

The digital workspace is evolving rapidly to support multimodal communication and collaboration features, enabling workspace users to switch between devices or use multiple screens to get things done. The digital workspace must enable mixed groups (internal and external participants) to work in whatever manner the task demands. This means supporting a variety of interaction types, both synchronous and asynchronous. "Constant on" video and audio conferencing is already a requirement for high-performing teams, as is the ability to share screens remotely and to integrate with room-based conferencing systems.

##### **Intelligent workflow, machine learning, and artificial intelligence**

Today's workspace solutions are relatively dumb, so the user must do all the work. With information volumes increasing every 18 months, the beleaguered knowledge worker needs every assistance to get work done in the most effective and efficient way. The advent of cognitive services, machine learning, and artificial intelligence presents real opportunities to those users and organizations that can harness the technology. MangoApps has demonstrated its ability to encompass search, mobile and cloud, so Ovum is confident that these new technologies will find their way into the product.

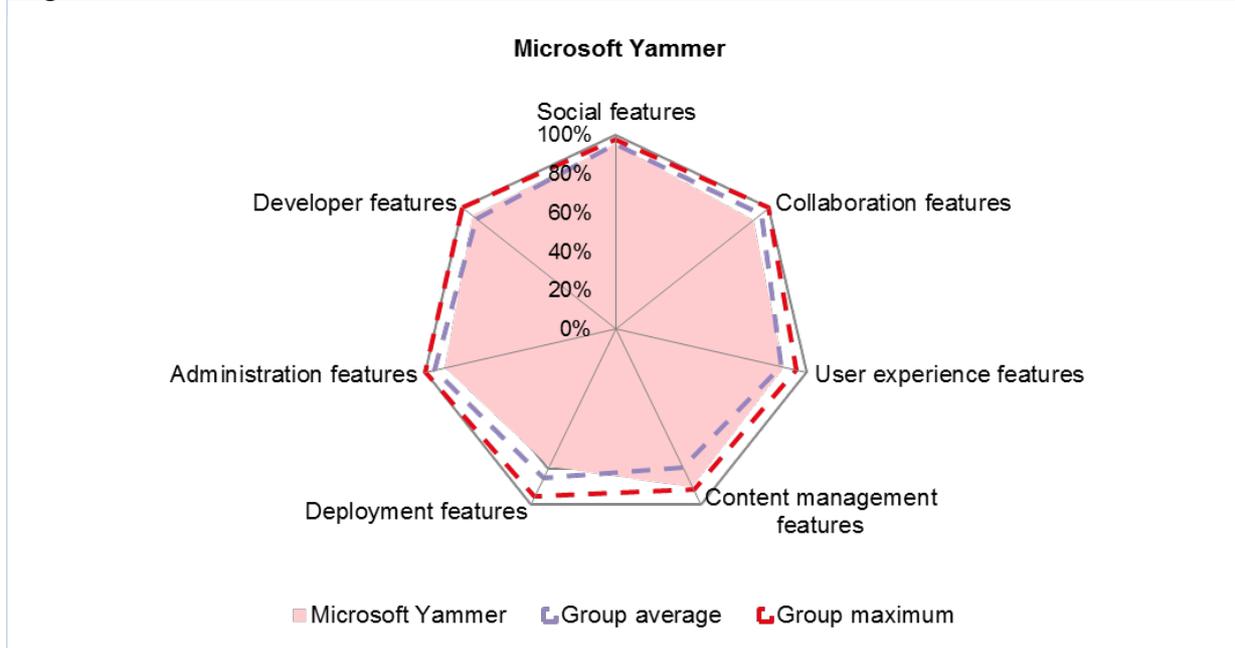
#### *Threats*

##### **Facebook enters the business systems market**

Microsoft, with Office 365 and Yammer, is playing a high-stakes game within the enterprise collaboration market. But it is the arrival of Workplace by Facebook, and the relaunch of Google for Work as G Suite, that could obscure MangoApps and the evident value that the product offers.

## Microsoft Yammer: Ovum Decision Matrix – Challenger

**Figure 8: Microsoft Yammer**



Source: Ovum

### Ovum SWOT Assessment

#### Strengths

**Yammer offers organizations a wealth of opportunity in terms of employee engagement, group interaction, and team productivity**

Yammer is available as a "freemium" and standalone product (at least until January 2017, when the standalone enterprise SKU will be retired), but its real value and utility are significantly amplified when used alongside other elements of the Office 365 stack. Office 365 integrated with Yammer delivers a comprehensive collaboration solution that includes enterprise social, email, real-time collaboration, and file sync and share. The Office 365 integration process is not yet complete, but Microsoft appears to be ramping up the pace as alternative solutions from Facebook and Google appear on the horizon. Digital transformation initiatives must incorporate human interaction and communication, so products such as Yammer are essential if organizations want to capitalize on the business interactions between employees, partners, and customers.

**Yammer benefits from continued investments in security, privacy, and compliance**

Yammer is a cloud-based communication and collaboration medium, and because it is likely to contain commercially sensitive information, corporate compliance officers want to hear satisfactory answers to the following questions: Where is the company data stored and who can access it? What is Microsoft doing to protect it? How is Microsoft complying with regulatory requirements? How can we verify that Microsoft is doing what it says? The Microsoft Trust Center provides answers to these questions, including how Microsoft handles legal demands for customer data and the security of its code. Certifications include HIPPA, FERPA, EU Model Clauses, SOC 1/SOC 2, and ISO/IEC 27001.

## *Weaknesses*

### **Being offered multiple different ways to communicate and collaborate can confuse and overwhelm some users**

Every Yammer group will give users access to a SharePoint document library and a OneNote notebook. However, Yammer already has features that resemble these capabilities (Notes and Files) in name and function. While Files and Notes will be replaced by SharePoint and OneNote, Microsoft has to be careful not to confuse users when it comes to integrating Yammer with other Office 365 resources. Choice is a good thing, but presenting too much choice to the end user can sometimes be debilitating.

### **Large enterprise social networks can lead to information overload and knowledge silos**

Enterprises produce information at a faster rate than anything else they might produce, including by-products and pollution! The promise of Office 365 is to provide organizations with an information substructure that can be used to search, filter, discover, and manage this mountain of data, and to present insights from the information contained within it. Although Microsoft has started to make information held in Yammer available to other Office 365 apps using Microsoft Graph, most of the information contained within Yammer is still treated as a distinct and separate repository from an Office 365 perspective, so Microsoft has more work to do before it can deliver on its promise.

## *Opportunities*

### **Connecting Yammer to LinkedIn could provide a useful bridge to external communities and other enterprise social networks**

LinkedIn is the world's largest professional network, but it falls short when networked professionals want to collaborate and work together in virtual teams. Microsoft announced its acquisition of LinkedIn in June this year, so the company now has a real opportunity to enhance the business value of Yammer networks (and other enterprise social networks) through what Ovum calls the "compound network effect," wherein the social capital (connectivity, activity, and popularity within a social network) contained within one network is boosted by a different kind of social capital from another network.

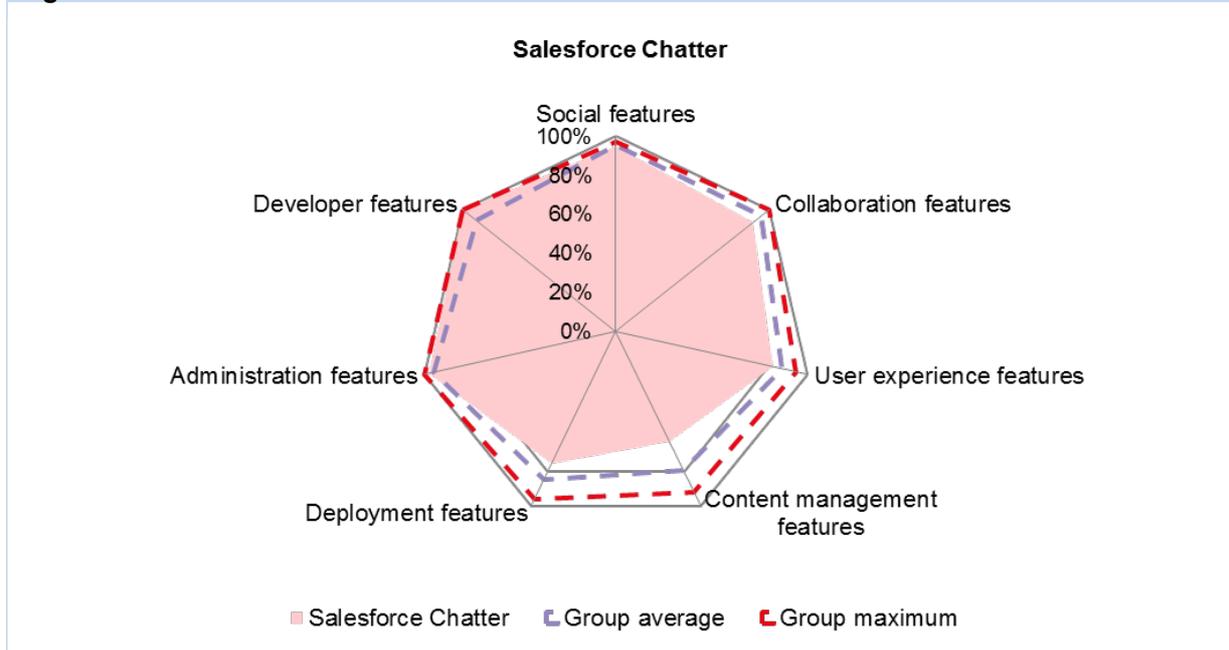
## *Threats*

### **Facebook and Google offer organizations an alternative workstyle**

Google continues to develop its enterprise offerings in the communication and collaboration space, and now there is a new threat entering the market: Workplace by Facebook. For many individuals, Google and Facebook represent the modern era of consumer technology and communications, which puts Microsoft in the "legacy supplier" category. Microsoft is doing a reasonable job of reinventing itself as a cloud company, but it no longer dominates the end-user computing market. Established businesses and institutions are not going to abandon their Microsoft investments, but new companies have a range of digital service providers to choose from, and Microsoft must compete against all of them.

## Salesforce Chatter: Ovum Decision Matrix – Follower

**Figure 9: Salesforce Chatter**



Source: Ovum

### Ovum SWOT Assessment

#### Strengths

##### Chatter captures important contextual business process information

Chatter is the social layer of the Salesforce platform. As such, it captures conversations, files, and activities that would otherwise lay obfuscated in corporate email systems and siloed content repositories. Chatter can capture contextual business process information and present this with the relevant business processes and associated data. Salesforce Communities extends Chatter's collaborative capabilities by enabling engagement between employees, customers, partners, and the organization's supply chain. Companies can create branded public or private communities to connect members with each other and, most importantly, with relevant content, data, and business processes.

##### Chatter is built to empower the mobile sales professional and field agent

The laptop computer still has a role to play within the enterprise, but tablets, slates, and smartphones have become the preferred application and data access devices among field sales and field support employees. Designed with a mobile-first philosophy, and powered by Salesforce's new Lightning UI platform, Chatter enables employees to follow or contribute to feed or group activity from any mobile device. Chatter users can also access files, sales records, contacts, and other resources from their preferred mobile device, enabling them to provide a better level of service to customers.

#### Weaknesses

##### An increasing number of organizations require e-discovery features

An increasing number of organizations require e-discovery features to support corporate governance requirements or legal hold when litigation issues arise. The ability to gather information pertaining to specific employees or matters is a feature that can save administrators or company executives a

significant amount of time and effort. Salesforce offers an export API that can be used to export data from the platform, but the product does not support the Electronic Discovery Reference Model or the Content Management Interoperability Services standard. Proven integrations with records management products and archiving systems exist, but prebuilt integrations with e-discovery solutions are not yet available.

### **Flexible deployment options accommodate legacy business constraints and strict governance requirements**

Chatter is available as a multi-tenant and single-tenant public hosted service, and while this is generally the norm for SaaS applications, it may present limitations for some organizations operating under heavily regulated regimes or with data sovereignty requirements. Earlier this year, Salesforce selected Amazon Web Services as its preferred public cloud infrastructure provider, enabling the company to expand internationally. However, the inability to deploy the product via an organization's data center or private cloud could detract from the offering in some circumstances.

### *Opportunities*

#### **Connecting Chatter to LinkedIn would extend the reach of the platform for many business professionals**

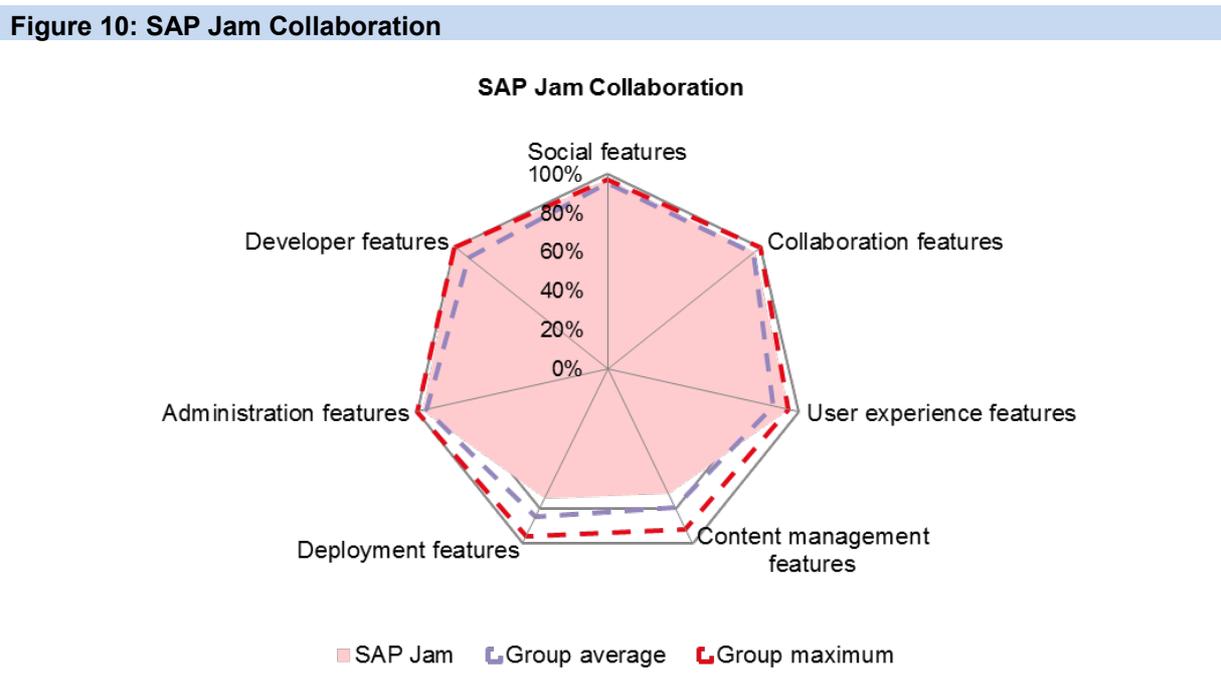
LinkedIn is the world's largest professional network, but it falls short when professionals want to collaborate and work together in virtual teams. A recent attempt by Salesforce to acquire LinkedIn confirms the value of this service to the vendor. Microsoft (the company that acquired LinkedIn) has said that it will be "business as usual" for LinkedIn, so Salesforce still has an opportunity to enhance the value of Chatter through what Ovum calls the "compound network effect," wherein the social capital (connectivity, activity, and popularity within a network) contained within one network is boosted by a different kind of social capital from another.

### *Threats*

#### **Facebook is eager to push into the enterprise market**

Chatter is available as a standalone product, but its real value comes from being interwoven with a company's business data and processes. It is possible to integrate other enterprise social networking products with the Salesforce platform, with Microsoft's Yammer being the most visible among Ovum's enterprise clients. However, there is one other vendor that cannot be ignored: Facebook. The launch of Workplace by Facebook signals a new and somewhat different kind of threat to all established vendors in this space, albeit one that is not yet quantifiable or readily discernable.

## SAP Jam Collaboration: Ovum Decision Matrix – Challenger



Source: Ovum

### Ovum SWOT Assessment

#### Strengths

**A platform designed to help organizations standardize, systematize, and optimize common work patterns**

SAP Jam Collaboration is designed specifically to standardize and systematize existing business processes that need to be improved, enhanced, and orchestrated. The product is extensible and flexible, and can be customized by employees to adapt to changing business needs. Organizations can also integrate the product with SAP applications and third-party business application data. SAP Jam Collaboration was built as a single solution that can meet internal corporate collaboration needs as well as external customer, partner, and vendor engagement needs in a way that is secure and easy to use.

#### Strong administration features and excellent developer capabilities

In terms of features, SAP Jam Collaboration is the equal of any other social intranet collaboration platform, offering the sophisticated business user an extensive set of capabilities. But the platform excels in developer support, scoring maximum marks against Ovum's assessment criteria. This is a platform that enterprises can command and call their own. SAP's extensive developer and partner network provides plenty of choice when organizations need regional skills or vertical expertise. SAP has a global sales force, across all regions and industries. The company sells through multiple lines of business with multiple routes to market, making it easy to engage with.

#### Weaknesses

**An increasing number of enterprises require e-discovery capabilities across all corporate communications**

Ovum's in-depth assessment of SAP Jam Collaboration shows the product to be an above-average performer in almost every assessment criterion. The only hint of a weakness is in content management. An increasing number of organizations require records management and e-discovery features to support corporate governance and legal hold requirements. The ability to gather information pertaining to specific employees or matters is a feature that can save administrators and company officials significant amounts of time and effort. SAP Jam Collaboration does integrate with third-party archiving solutions, but not third-party e-discovery tools.

**Flexible deployment options accommodate legacy business constraints and strict governance requirements**

SAP Jam Collaboration is offered as a multi-tenant public hosted service. While this is generally the norm for SaaS applications, it does present limitations for some organizations operating under heavily regulated regimes or with data sovereignty requirements. It should be noted that SAP offers organizations a choice of data center location outside of North America and Europe, and the product can establish data links with on-premise systems.

*Opportunities*

**Connecting SAP Jam Collaboration to LinkedIn would extend the reach of the platform for many business professionals**

LinkedIn is the world's largest professional network, but it falls short when these professionals want to collaborate and work together in virtual teams. SAP has an opportunity to enhance the value and utility of Jam Collaboration through what Ovum calls the "compound network effect," wherein the social capital (connectivity, activity, and popularity within a network) contained within one network is boosted by a different kind of social capital from another.

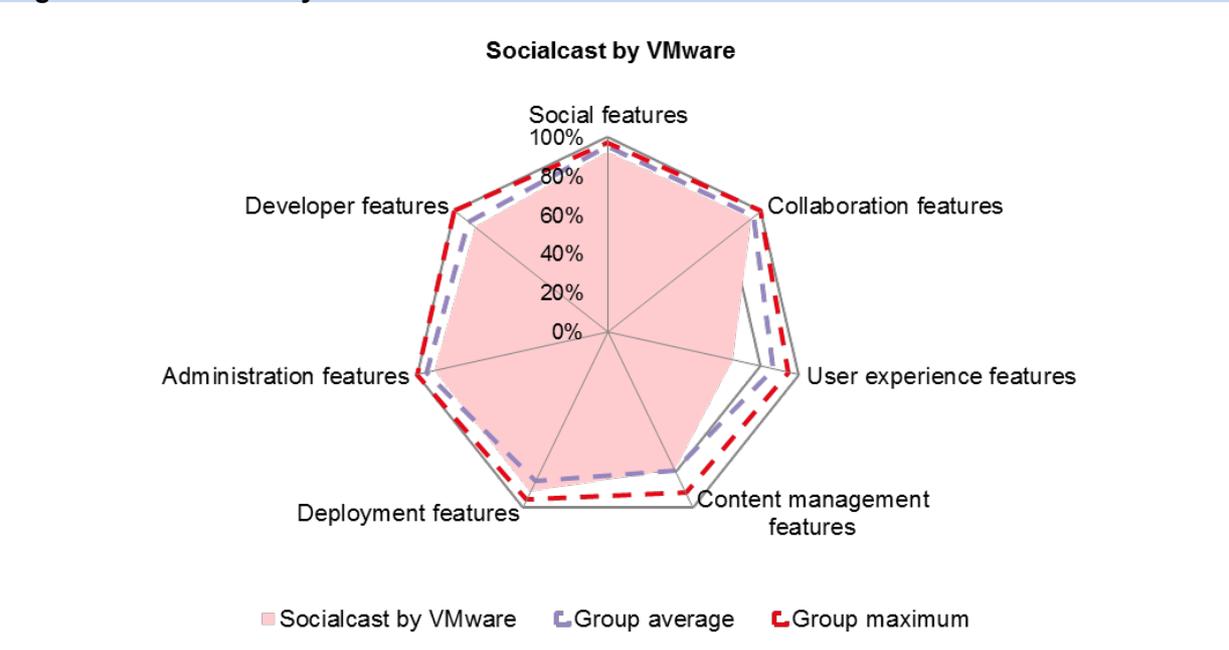
*Threats*

**Facebook and Google are eager to push into the enterprise market**

IBM, Salesforce, and Jive are significant competitors to SAP Jam Collaboration, especially where companies are looking to use a corporate-wide social collaboration tool. Microsoft, with Office 365 and Yammer, is also omnipresent in this market. However, there are two other vendors that cannot be ignored: Google and Facebook. Google's G Suite (formerly Google Apps for Work) provides organizations with communication and collaboration tools, with Google+ providing the business social networking capabilities. The launch of Workplace by Facebook signals a new and somewhat different kind of threat to all established vendors in this space, albeit one that is not yet quantifiable or readily discernable.

## Socialcast by VMware: Ovum Decision Matrix – Follower

Figure 11: Socialcast by VMware



Source: Ovum

### Ovum SWOT Assessment

#### Strengths

##### **Socialcast provides an effective on-ramp to the enterprise digital workspace**

Socialcast is integrated with Content Locker, Video, and Workspace ONE, and the integrated bundle combines identity and access management (IAM), enterprise mobility management (EMM), mobile productivity apps, social collaboration, mobile content management, and virtualized desktop infrastructure (VDI). The ability to access any app from any device with single sign-on and integrated workflow across these disparate technologies will help transition businesses to the digital workspace.

##### **Designed to integrate with corporate applications and IT infrastructure**

The Integration Store allows users to include content and alerts from applications that are enabled based on corporate policies. These integrations can be made available at the organization level or for specific groups. APIs and webhooks allow further integration into corporate applications. Socialcast also offers a technology named Reach Extensions, which enables teams to embed various social components inside their applications to offer bidirectional collaboration.

#### Weaknesses

##### **Files stored within enterprise social networks must be quickly, easily, and consistently surfaced**

The search capabilities of enterprise social networking solutions are extremely important when it comes to sifting through vast amounts of information. A large enterprise social network could grow to hold many thousands of shared documents and updates, so advanced search techniques, such as proximity searching and metadata filtering, are important as users try to find the proverbial "needle in a haystack." Socialcast offers reasonable search features today, but metadata and document property

searching is inconsistent. Also, the ability to preview and provide thumbnail views of common file types, such as Microsoft Office documents and PDFs, would be a welcome feature addition.

### **Socialcast lacks e-discovery features**

An increasing number of organizations require e-discovery features to support corporate governance requirements and legal hold when litigation issues arise. The ability to gather information pertaining to specific employees or matters is a feature that can save administrators or company officials significant amounts of time and effort. Socialcast does integrate with third-party records management and archiving solutions, but third-party e-discovery tools are not yet supported.

### *Opportunities*

#### **The professions need immediate modernization**

The professions have traditionally been a very conservative segment of the knowledge worker market when it comes to the adoption of cutting-edge technology, but the digital transformation wave is already bearing down on doctors, lawyers, accountants, tax advisers, management consultants, and architects. The world is transitioning from a "print-based industrial society" to a "technology-based Internet society," so the professions need to find better ways to externalize their knowledge and expertise as digital services. Socialcast, as part of Workspace ONE, could be packaged to support the "networked experts" business model found in the professions, and tailored by VMware's partners to accommodate industry-specific requirements and processes.

#### **Connecting Socialcast to the LinkedIn network would extend the reach of Socialcast for many business professionals**

LinkedIn is the world's largest professional network, but it falls short when networked professionals want to collaborate and work together in virtual teams. VMware has an opportunity to enhance the value and utility of Socialcast through what Ovum calls the "compound network effect," wherein the social capital (connectivity, activity, and popularity within a social network) contained within one network is boosted by a different kind of social capital from another network.

### *Threats*

#### **Facebook and Google are eager to push into the enterprise market**

Jive Software is a significant competitor to Socialcast where companies are looking to use a corporate-wide social tool, but Microsoft, with Office 365 and Yammer, is the seemingly unstoppable juggernaut in this domain. However, there are two other vendors that cannot be ignored: Google and Facebook. Google's G Suite (formerly Google Apps for Work) provides organizations with communication and collaboration tools, with Google+ presenting the business social networking capabilities. The launch of Workplace by Facebook signals a new and somewhat different kind of threat to Socialcast, albeit one that is not yet quantifiable or easily discernable.

## Appendix

### Further reading

*SWOT Assessment: SAP Jam Collaboration*, IT0021-000210 (October 2016)

*SWOT Assessment: Salesforce Chatter*, IT0021-000209 (October 2016)

*SWOT Assessment: Socialcast by VMware*, IT0021-000208 (October 2016)

*SWOT Assessment: Microsoft Yammer*, IT0021-000207 (October 2016)

*SWOT Assessment: IBM Connections Cloud/IBM Connections Suite 5.5*, IT0021-000206 (October 2016)

*SWOT Assessment: MangoApps*, IT0021-000204 (October 2016)

*SWOT Assessment: Jive Interactive Intranet*, IT0021-000202 (October 2016)

"Workplace by Facebook: A communications platform for every employee," IT0021-000201 (October 2016)

"Collaborative partnerships drive disruptive innovation," IT0021-000175 (June 2016)

"Microsoft acquires LinkedIn as Facebook prepares to enter its domain," IT0021-000176 (June 2016)

"Salesforce Community Cloud gathers market momentum," IT0020-000213 (May 2016)

"Breaking free of the inbox: Groups, Slack, or Spark?" IT0021-000158 (March 2016)

"Coming to a device near you: the enterprise digital workplace," IT0021-000150 (February 2016)

*2016 Trends to Watch: Employee Engagement, Productivity, and Collaboration*, IT0021-000145 (February 2016)

"Collective energy – making the most of an engaged, collaborative workforce," IT0021-000129 (November 2016)

*Enterprise Case Study: Organizational Culture is Critical to Enterprise Social Network Success*, IT0007-000828 (August 2015)

"Why you need an enterprise social network," EI0024-000025 (July 2015)

*Enterprise Social Networking*, IT013-000182 (September 2012)

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