

## I D C   D A T - A - G L A N C E



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### **Collaboration 2.0 – A "Mashup" of Collaboration, Portals and Web 2.0**

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*Collaborative applications enable groups of users to work together by sharing information and processes. Tools of collaboration include email, group calendars and scheduling, shared directories, instant and unified messaging, web-based application tools, and conferencing applications.*

*Recent times have further seen the influence of Web*

*2.0 tools such as wikis, blogs, social-networking and digital content sharing. These applications are generally interactive and rich in user experience, and they allow users to become active contributors, participants and collaborators. Enterprise portals integrate access to information and applications – and in combination with collaboration and Web 2.0 technologies form the emerging collaboration 2.0 framework.*

*Unleashing an organisation's collective wisdom through brainstorming, debates and collaboration, enables companies to make the best possible business decisions.*

#### **Market Trends**

- IDC's research shows that collaboration applications and technologies have become an important pillar in B2B and B2C communication strategies. Instant messaging, information/knowledge portals, and internal wikis in particular are showing strong future potential in changing the way businesses communicate with the inside and outside worlds.
- Collaboration is progressing in its convergence with broader application offerings. Traditional and modern aspects of collaboration including portals, messaging, workflow, social networking and unified communication are becoming more integrated into composite application frameworks.
- Web 2.0 applications evolved from the consumer segment where adoption and usage is widely spread. The corporate world has not yet embraced Web 2.0 across the board, but increasingly enterprises are realising the potential of these second generation collaboration tools as a source for productivity improvements, cost reductions, and providing a more attractive workplace to employees.
- Portal technologies provide a powerful platform for the integration of Web 2.0 with "traditional" collaboration applications such as instant messaging, group calendars and shared directories. Although a centralised enterprise-wide framework helps break down the walls and silos of collaboration that are ubiquitous in today's organisations, portals are often under-utilised in their ability to provide an enterprise-wide collaboration platform.
- IDC's AP Enterprise 2.0 Survey (December 2008) indicates that the usage of Web 2.0 applications in enterprises is increasing. This results from growing familiarity and awareness

about the potential improvements in areas such as staff productivity, client networking and staff retention which is reflected in strong technology adoption and changing user attitudes.

## Market Accelerators

- Collaboration strategies that empower and encourage workers to innovate with Web 2.0 technologies can be fuelled by the recent economic downturn as they strengthen relationships with today's customers and prospects; tap into the collective wisdom of partners, customers and others to augment the knowledge of shrinking workforces.
- Early adopters of new age collaboration technologies have identified a source of competitive advantage through personalised customer engagements, improved talent utilisation and internal productivity gains. Although a large proportion of companies still have concerns around the security aspects of these collaboration tools, IDC expects them to fade as solutions mature and adoption becomes more mainstream.
- Web, audio and video conferencing are technologies that are expected to gain momentum during challenging economic times. These tools enable organisations to reduce travel and office operational costs by giving employees the ability to conduct effective online meetings and to telecommute while still collaborating effectively with colleagues and customers.
- IDC's research has found that Web 2.0 has a positive impact on organisations sales efforts. Additionally, the use of blogger endorsements and social networking communities in marketing campaigns lead to increased brand identification which results in customer loyalty and turns these tools into popular components for customer relationship strategies.
- Strong integration capabilities with portal infrastructure, along with established security and authentication features, often shortens the launch time of new Web 2.0 applications within organisations.

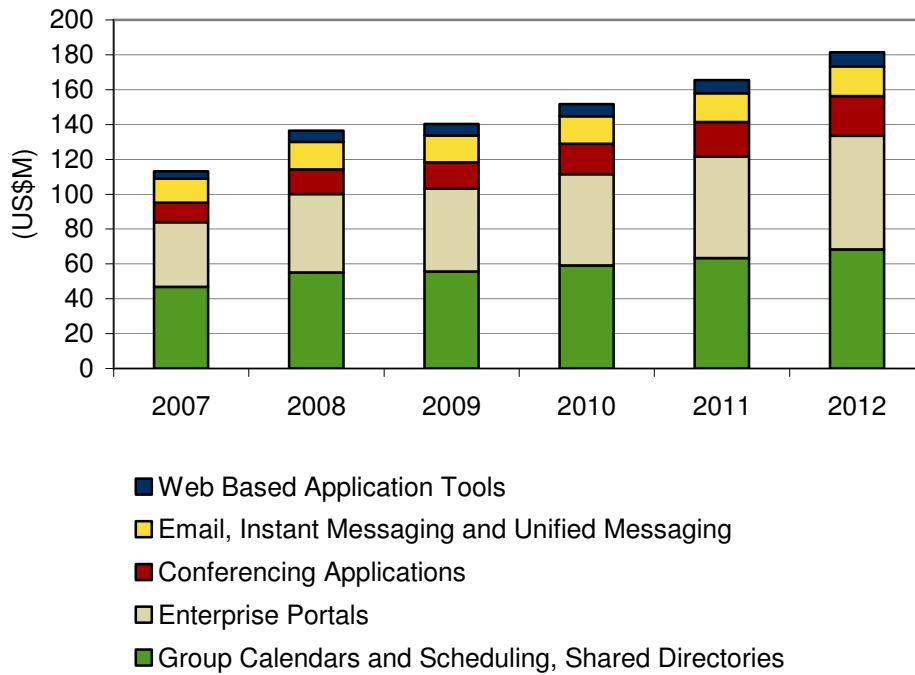
## Adoption Trends

- Many collaboration applications and technologies such as real-time instant messaging, web conferencing and IP audio-conferencing are already used by ANZ organisations as stand alone technologies. Many of these adopters are now starting to expand on their capabilities through adoption and integration of a broader set of collaboration tools.
- Approximately 50% of respondents of a US based IDC survey either disagreed or strongly disagreed with the statement, "Our organization is effectively using Web 2.0 technologies such as wikis, blogs, and social networking.". The results underline the opportunity gap that wikis, blogs, application mashups, social networking and RSS feeds imply as they allow individuals and teams to work differently in the face of the dramatic challenges of the current marketplace and the drive for operational efficiencies.
- An increasing proportion of enterprises consider Web 2.0 an opportunity for their organisations rather than a threat. IDC's research shows that 46.8% of enterprises across the Asia Pacific region consider Web 2.0 applications to be an opportunity, and 34.8% consider Web 2.0 applications to be both a threat and an opportunity.
- Adoption of instant messaging, a collaboration application, is driven by organisations recognising that workers can be more productive and function more effectively, both individually and as team members, when they have the ability to easily locate and communicate with others in real time. As a result, adoption of instant messaging in the Asia Pacific region is forecast to grow at a 2007-2012 compound annual growth rate (CAGR) of 24.7%, clearly outgrowing traditional communication methods such as email.

- Retail and wholesale firms represent the most proactive adopters of modern collaboration tools based on having the high collaboration awareness as their traditional "bricks and mortar" distribution model is under threat from the rising adoption of internet trading.

**FIGURE 1**

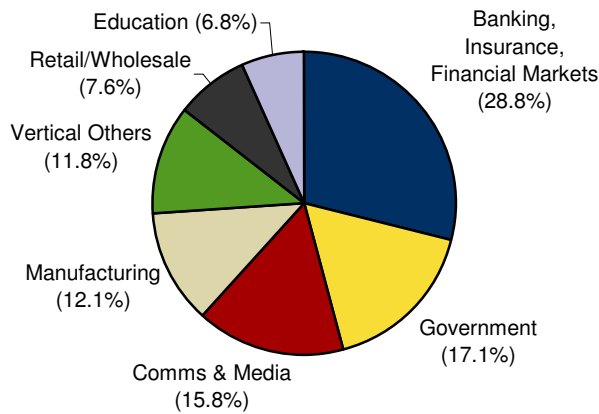
Collaboration Tools ANZ: Forecast by Category 2007 - 2012



Source: IDC 2008

**FIGURE 2**

Collaboration Tools ANZ: Revenue Share by Industry, 1H 2008



Source: IDC 2008

## ABOUT THIS ANALYST

*Ullrich Loeffler is Program Manager for IDC's software research unit in the Pacific region. In his role, Ullrich is responsible for management, coordination and further development of the software research programs across Australia & New Zealand.*

*In addition, Ullrich analyses the market for Information Management Solutions. His responsibilities include conducting vendor, business partner, and end-user studies and producing knowledgeable insights and analysis into dynamic and coherent information environments. This comprises all components of dynamic infrastructure, information and application platforms.*

*Ullrich is also a regular speaker at IDC and industry events across Australia and New Zealand and he is frequently quoted in IT and trade publications throughout the Asia/Pacific region.*

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