

The Yankee Group Business Collaboration Tournament: And You Thought the Madness Was Over

The Bottom Line:	In this Yankee Group Report, we match up 16 of the top business collaboration vendors in head-to-head contests. Although only one vendor can be crowned king of the collaboration court, this Report covers the entire gamut of business collaboration solutions and provides a comprehensive vendor landscape.
Key Concepts:	Collaboration, Web 2.0, workforce mobility, messaging, conferencing, web services, SaaS
Who Should Read:	CEO, CIO, CTO, CFO

Practice Leader: [Zeus Kerravala](mailto:zkerravala@yankeegroup.com), Enterprise Research Senior Vice President, zkerravala@yankeegroup.com, 617-598-7235

Executive Summary

Although the buzzer-beaters and Cinderella surprises of the NCAA college basketball tournament have been put to rest for 2008, Yankee Group revisited March Madness in the business collaboration vendor landscape.

This season marks the inaugural Yankee Group Business Collaboration Tournament. Based on the framework we've developed, the tournament will crown the technology vendor with the most comprehensive business collaboration solution the champion of 2008.

In addition, in this Report we also announce the Yankee Group All-Tournament Team and Collaboration Coach of the Year. These awards are given to the vendors that are most successful within the categories we evaluated:

- Community-centric collaboration solutions
- Real-time and messaging collaboration solutions
- Mobile collaboration solutions

We also evaluate the 16 selected vendors (see Exhibit 1) on IT friendliness (e.g., their ability to integrate with existing solutions); the level of service and support they provide; and, at a strategic level, their product road map, their commitment to business collaboration relative to their entire portfolio and their long-term viability.

However, the purpose of the tournament is not to predict the ultimate market champion, but to evaluate vendors on functionality and alignment with Yankee Group's vision of the Anywhere Enterprise™, which essentially is a business that—technologically speaking—allows corporate users to work anywhere using any device. The goal of the Report is to help businesses make the right purchasing and licensing decisions for their collaboration infrastructure and strategy.

We have just entered the first round of actualizing Yankee Group’s vision of the Anywhere Enterprise. As Joe Burton, CTO of Cisco’s Unified Communications division, put it, “The number of people nailed down to a desk is dwindling.” Though in its infancy, the Anywhere Enterprise has arrived due to advancements in network technologies (namely Wi-Fi, broadband and cellular networks), the evolution of the internet (e.g., rich internet application technology, online commerce, Web 2.0) and globalization. All of these factors have created a global network that enables businesses of all sizes to operate anywhere in the world. This network also enables people to work anywhere in the world. These factors have created an increasingly mobile and distributed global workforce.

Because of this actualization, tools to facilitate collaboration within and between organizations are more important than ever. Without an effective collaboration strategy with multiple access points for end users, businesses will fail in the Anywhere era.

Exhibit 1.
The 2008 Yankee Group Business Collaboration Tournament Bracket
Source: Yankee Group, 2008

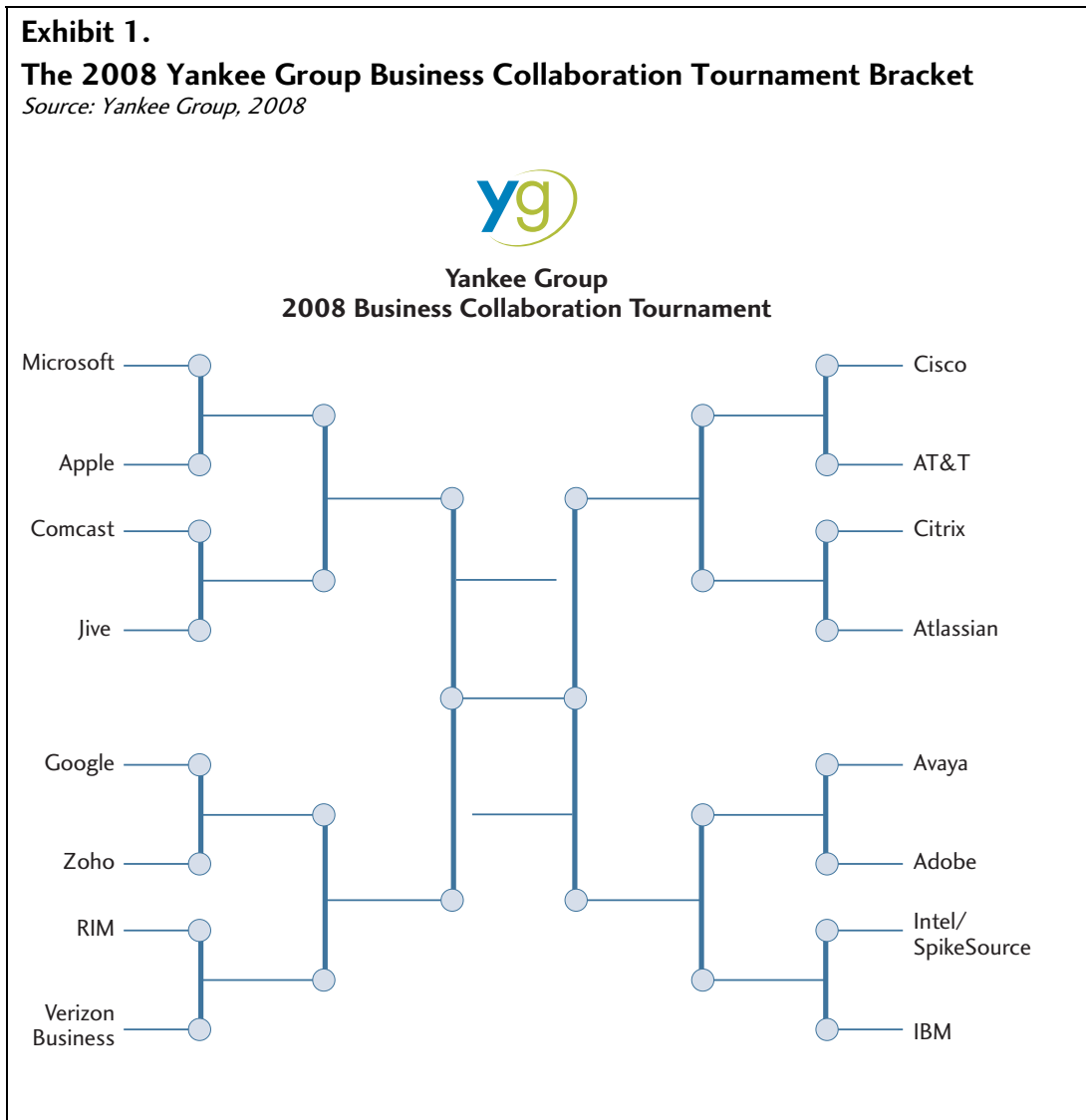


Table of Contents

I.	The Method to the Madness	4
II.	Round One: The Sweet 16	6
	Microsoft vs. Apple	6
	Comcast vs. Jive	7
	Zoho vs. Google	7
	RIM vs. Verizon Business.....	8
	Cisco vs. AT&T	8
	Citrix vs. Atlassian	9
	Avaya vs. Adobe.....	10
	Intel/SpikeSource vs. IBM	10
III.	Round Two: The Elite Eight	11
	Microsoft vs. Jive.....	12
	Zoho vs. Verizon Business.....	13
	Cisco vs. Atlassian	13
	IBM vs. Avaya	14
IV.	Round Three: The Final Four	15
	Microsoft vs. Zoho.....	16
	Cisco vs. IBM	17
V.	The Final Showdown	18
	Microsoft vs. IBM.....	19
VI.	Post-Tournament Awards, Analysis and Recommendations	20
	All-Tournament Team at the Big Three (and Honorable Mentions)	20
	Post-Tournament Analysis	20
	Recommendations for Businesses	21
	Recommendations for Vendors.....	22
VII.	Further Reading	23

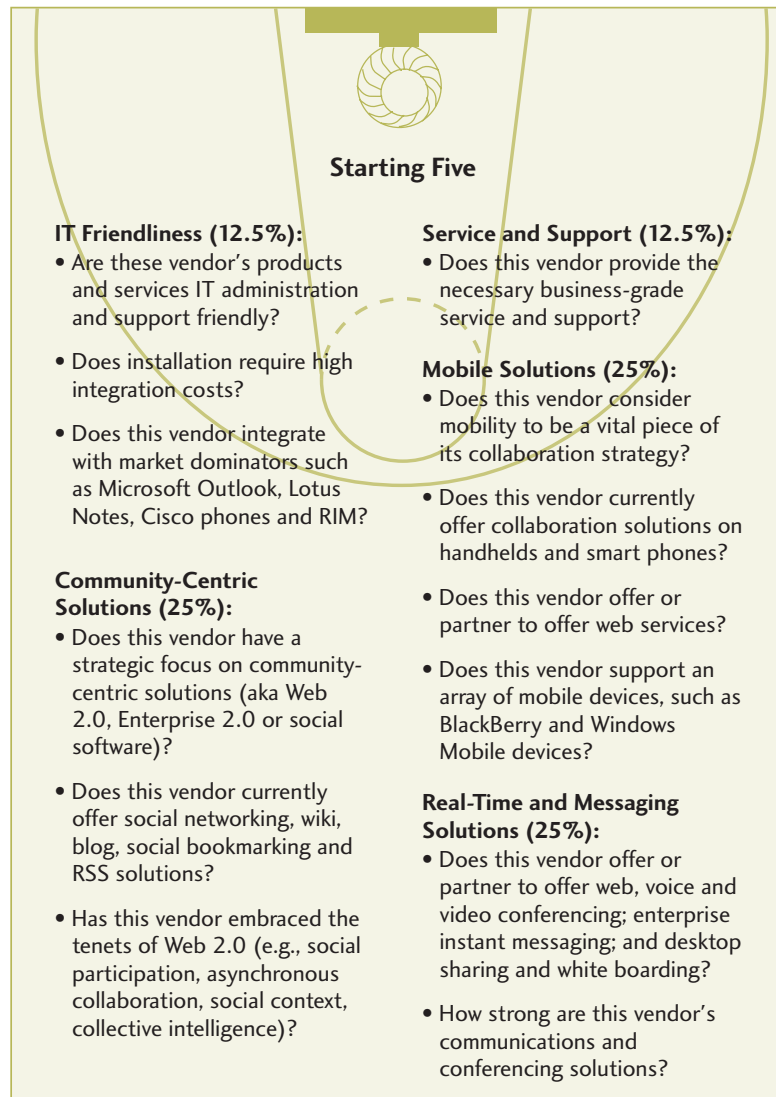
I. The Method to the Madness

To rank, match up and ultimately eliminate technology vendors from our Business Collaboration Tournament, we established a pair of weighted grading systems. For each vendor, these are called its Starting Five and Head Coach (see Exhibit 2). In Exhibit 2 we provide the justifications for our grading system.

Exhibit 2.

The Business Collaboration Starting Five and Head Coach Defined

Source: Yankee Group, 2008



Head Coach

Product Road Map (50%):

- Regarding this vendor's upgrade plans for its collaboration portfolio in the next 12 to 18 months—How closely aligned are the upgrades to Yankee Group's vision of business collaboration?

Commitment to Strategy (25%):

- Has and will this vendor dedicate the necessary and appropriate resources to its business collaboration strategy?

Long-Term Viability (25%):

- How likely is the vendor to exist on its own in 1 to 2 years?

Yankee Group's vision of business collaboration rests on three data-supported pillars (we call these the Big Three):

- **Community-centric collaboration solutions** (e.g., enterprise social networking, wikis, blogs, RSS, social bookmarking, shared productivity applications and workspaces):
 - Among the top three priorities for respondents to the Yankee Group *Anywhere Enterprise—Large: 2007 US Mobility and Business Applications Survey* is bringing elements of the consumer web (such as social networking, blogs or wikis) to their IT strategies and business applications portfolios. This was true of IT decision-makers in the US (33% of respondents), Europe (31% of respondents) and Asia-Pacific (37% of respondents). Enterprise 2.0 enters its growth stage on the S curve in 2008 and community-centric collaboration tools will soon become integral to every collaboration infrastructure.
 - More than half of the US-based IT decision-making respondents to the Yankee Group *Anywhere Enterprise—Large: 2007 US Mobility and Business Applications Survey* are currently using or considering the use of social networking solutions. And while businesses have only recently shown interest in social networking due to its success on the consumer web, we believe social networking as a feature within the array of business collaboration applications and tools will revolutionize business collaboration within the next 12 to 18 months.
- **Real-time and messaging collaboration solutions** (e.g., unified communications [UC], instant messaging, presence, e-mail, voicemail, voice, web conferencing, video conferencing):
 - IP phones, unified messaging (one inbox for e-mail, voicemail, fax, etc.) and web conferencing are the top three UC applications that US-based IT decision-makers believe will provide the biggest productivity improvements for their organizations. Therefore, the foundation of UC is built on IP phones, web conferencing and unified messaging (not to be confused with unified communications, which encompasses instant messaging, voice, video conferencing, web conferencing, etc., on the desktop, desktop phone and mobile device).
 - Among organizations that have deployed IP telephony solutions in the US, 79% of respondents to the Yankee Group *Anywhere Enterprise—Large: 2007 US Economics of IP Communications Survey* agree or strongly agree that IP telephony makes it easier to deliver services to telecommuters and road warriors, and 76% agree or strongly agree that IP telephony makes users more efficient. IP telephony delivery and integration are a must.
 - The top two non-financial metrics US companies are using to measure ROI for their investment in UC according to the Yankee Group *Anywhere Enterprise—Large: 2007 US Economics of IP Communications Survey* are (in order): “access to colleagues within your company and partners” and “improving the speed of making important decisions.” Therefore, vendors must demonstrate the ability to deliver on these metrics to receive high scores.
- **Mobile collaboration solutions** (e.g., web services, smart phone/handset voice and data solutions, remotely accessible applications):
 - According to the Yankee Group *Anywhere Enterprise—Large: 2007 US Mobility and Business Applications Survey*, the number-one challenge US enterprises face when collaborating is “remote employees don't have the same applications as office workers.” Therefore, we find web services or remotely accessible applications to be a necessary mobile offering from collaboration vendors.
 - The Yankee Group *Anywhere Enterprise—Large: 2007 US Economics of IP Communications Survey* showed that 40% of US enterprises plan to deploy mobile phone UC integration within the next 12 months; 71% plan to deploy it in 12 months or more. Integrated mobile communications tools must be on vendors' product road maps.

- Based on the Yankee Group *Anywhere Enterprise—Large: 2007 US Mobile Professional Blended Lifestyle Survey*, 35% of US mobile workers spend more than 20% of their time away from their primary workspace. These workers consider a data-centric handheld (e.g., a smart phone), a voice-centric handheld (e.g., a conventional cellular phone) or a PDA as their primary mobile device for work purposes. Vendors must deliver collaboration solutions to handheld devices to receive high scores in this category.

We assigned each of these pillars a 25% weight and we graded each vendor on a 1 to 5 scale (1 = limited/poor, 3 = capable, 5 = optimal) based on their capabilities within these categories. We also recognize that collaboration solutions must meet the needs of IT in terms of both administration and integration (IT friendliness, 12.5%) and service and support (12.5%). These five vendor evaluation metrics, totaling 100%, are what we call the Starting Five Score.

But like all successful college basketball programs, the Starting Five on any team must be groomed for success by their coaching staff. Our Head Coach evaluation metric is the second criterion by which we grade each vendor. Product road map (50%), commitment to strategy (25%) and long-term viability (25%) make up 100% of the Head Coach Score; and again this category is graded on the same five-point scale. The average of the Starting Five Score and the Head Coach Score gives us each vendor's Business Collaboration Score. The vendor with the highest Business Collaboration Score wins.

It is important to note that the matchups we have established pair together vendors with very different capabilities and solutions. The point of the tournament is not to pit vendors against other vendors that do not directly compete and as a result unfairly deem one more capable than another. Instead, we compare vendors based on their vision as it aligns to ours. We created the matchups from the ground up and only after we graded each vendor (see the Index section for a breakdown of the scores).

Let the games begin!

II. Round One: The Sweet 16

Microsoft vs. Apple

Apple is the apple of the market's eye and the UCLA (the most dominant NCAA college basketball team of all time) of the MP3 player/software market. However, when it comes to enterprise collaboration, sexy hardware and clever marketing are no match for Microsoft, the enterprise-servicing juggernaut of Redmond, Washington.

This is no Mac versus PC commercial. Apple is overmatched at every Starting Five position on the floor. Mac OS X Server does sport some interesting Web 2.0 features such as a server-based wiki and a podcast producer, and enhanced messaging and video conferencing features on its iChat server, as well as its software development kit (SDK) for the iPhone and the Anywhere Applications features discussed in the January 2008 Yankee Group Report, [New Apple Macintosh OS Leopard Stakes Out New Anywhere, Mobility Territory](#). But whether or not it will admit to quietly attempting to expand in this market with these solutions, Apple is a consumer company and its commitments to business collaboration are too weak to match the Microsoft portfolio.

As far as community-centric tools go, Apple has shown little interest in making its services more social beyond its wiki on Mac OS X Server, which we feel is a must for consumer and enterprise services alike. Even iTunes has yet to become Web 2.0 in nature the way Amazon has, for example, with comments and ratings. On the other hand, in recent months Microsoft has invested heavily in its My Site social networking features in SharePoint and intends to become the Facebook of the enterprise. Strategic partnerships with Web 2.0 all-stars Atlassian and NewsGator in late 2007 were huge pickups as well.

Microsoft understands the service and support needs of enterprises better than anybody and has proven itself able to handle the largest enterprises in the world as well as consumers. Both Apple and Microsoft have their mobile play; but as far as devices go, the iPhone (at least this season) does not have the IT support required to become a viable business device just yet. Apple has improved its interoperability with Windows-based applications with each release of OS X, but the average Mac user will still encounter issues that can disrupt collaboration efforts with PC users. As the adoption of web services grows, so will Apple's hardware market share. But Microsoft is a skilled veteran in business collaboration, while Apple is still an inexperienced—albeit flashy—freshman.

Winner: Microsoft

Comcast vs. Jive

Comcast added a notable recruit to its Starting Five in late 2007, with its newly formed partnership to offer Microsoft Communications Services to its small and medium business (SMB) broadband and voice customers. Microsoft Communications Services give Comcast a software-as-a-service (SaaS) Exchange-based e-mail and calendaring play with Windows Mobile access and document sharing via Microsoft SharePoint (as a hosted web service). Comcast also partners with Citrix to offer GoToMeeting web conferencing services.

Jive may not have the brand Comcast carries in the United States—but when it comes to business collaboration, these guys know how to hit shots. Jive has been criticized in the market for failing to shed its legacy in online forums. However, its latest release of Clearspace coupled with its instant messaging solution Openfire Enterprise make Jive a team that larger vendors should fear in the opening rounds. Jive's Clearspace combines wikis, blogs, RSS, file sharing and forums into a single collaboration suite with superb administrative capabilities such as space-level access control, which enables users to limit who views and edits content within their group spaces. Strengthening Jive's community-centric position on the floor is its tagging and rating functionality and social-networking profiles feature that ties content to users and can be presence enabled with the use of Openfire Enterprise.

Comcast has long-term viability in its core markets and is a mismatch for Jive at the real-time and messaging position, but Jive has a more holistic approach to collaboration rooted in the community, simplicity, flexibility and mobility tenets of Web 2.0. Meanwhile, Jive is strictly focused on business solutions whereas Comcast as a whole is most certainly not.

Winner: Jive

Zoho vs. Google

Collaboration fans could not have asked for a more exciting first round matchup. However, the misinformed fan might want to double-check where to place his or her bets. To the average fan, Google is the clear winner because *a.* it's Google and *b.* all journalists in the space use Google Apps as their example when referring to web-based productivity suites. However, like Apple, Google is a consumer company and in a matchup against SMB-focused Zoho, Google's business solutions do not stack up.

According to Zoho's Raju Vegesna, Zoho wants to be “the IT department for SMBs,” not just a collaboration or productivity solution. But when it comes to collaboration, Zoho offers a constantly growing list of rich solutions including Zoho Meeting (an audio and video web conferencing solution), Zoho Wiki (one of Zoho's weaker services) and Zoho Projects (a project management application). Zoho's competitive solutions to Google Apps for collaboration on documents, spreadsheets and presentations (Zoho Writer, Zoho Sheet and Zoho Show, respectively) are richer in functionality and offer the same sharing capabilities as Google Apps.

Google's Gmail (e-mail), Calendar (shared calendaring) and Talk (IM with VoIP, presence and file-sharing capabilities) are top-tier online collaboration and communications solutions. However, Zoho is SMB-focused and Google is attempting to kill two birds with one stone. IT departments have not been convinced that the service-level agreements (SLAs) Google offers with Google Apps Premier Edition are worthy of a total conversion to cloud computing. Both Google and Zoho suffer from this roadblock, among others. But for Zoho, it's do or die; whereas for Google, it's do or continue to make billions in online search and advertising.

Both Google's and Zoho's solutions are delivered in a SaaS model; and therefore both are innately mobile. On the mobile handset side, Google outwits Zoho with natively supported Google Mail and Google Talk widgets for BlackBerry smart phones and has a group-editable web page solution comparable to Zoho Wiki with its February 2008 release of Google Sites. In addition, Google Reader is an excellent RSS reader; but in the end, Zoho's Head Coach pushes it into the Elite Eight in a decisive victory over Google.

Winner: Zoho

RIM vs. Verizon Business

RIM's BlackBerry devices are to mobile business collaboration what Nikes are to hoops players—but RIM does not have the breadth of services to compete with the Verizon Business collaboration portfolio. It's difficult for any vendor in the tournament to match up with Verizon Business at the real-time and messaging solutions position with its Mobile Conference Connection built for BlackBerry devices, hosted instant messaging, e-mail and conferencing services, and of course IP telephony solutions. But as a telecommunications company, Verizon Business remains focused on “leveraging the network.” Verizon integrates very well with Cisco and Microsoft products, and it plans to work equally as seamlessly with IBM and Nortel. But Verizon has little to no expertise in community-centric solutions, and Yankee Group insists that community-centric features must become part of every collaboration and productivity solution, including voice. As far as we can tell, Verizon Business will let its partners do the work for it at this position (which is probably the right move for now; Verizon Business just has to demonstrate an understanding of the importance of community-centricity).

RIM will continue to be a dominant force in the mobile collaboration solutions space and has mastered the management playbook for both IT (administration, integration, support and security) and end users (usability, reliability, etc.). It formed an important partnership with IBM Lotus in January 2008, adding a native Lotus Connections application (IBM's social software suite) for BlackBerry smart phones—which is notable in this first-round matchup—but Verizon Business takes this one in stride.

Winner: Verizon Business

Cisco vs. AT&T

AT&T could not be thrilled with its seed considering its opponent in the first round. But AT&T comes into the tournament with a strong résumé comparable to that of its telecommunications rival Verizon Business. AT&T's acquisition of voice, web and video conferencing services provider Interwise in November 2007 is the company's most anticipated recruit for collaboration fans in some time. The product's integration into Microsoft Outlook and Lotus Notes gives AT&T a place on the desktop; but like Verizon Business, when AT&T thinks collaboration, it thinks real-time communications and conferencing. AT&T is one of the best on the floor at this position and is a trusted provider for fixed and mobile communications alike, but real-time communications services are only a piece of the collaboration pie.

The networks and data centers that collaboration services run on are like the arenas and courts where basketball games are played: They are absolutely necessary (not to mention profitable). But the collaboration game is played by the Starting Five, and AT&T has only four—albeit capable—players on the floor and shows little indication in its product set that it understands the impact Web 2.0 currently has and will continue to have on business collaboration.

On the other hand, Cisco has demonstrated the ability to research, recognize, embrace (both externally and internally, which is not to be overlooked) and deliver the next big thing that will change the business collaboration game forever. Cisco's acquisition of WebEx in March 2007 demonstrated that it recognized the need to find its place on the desktop and it did so by acquiring the market leader in web conferencing. It also recognized the need to develop expertise in the web services realm with this acquisition—very Web 2.0. And while everyone's talking about communications-enabled business processes, very few other than Cisco are doing something about it.

Cisco knows it needs to live in community-centric solutions and it works with Microsoft and IBM to do so. Cisco opened its application programming interfaces (APIs) for its Unified Communications 6.0 product more than a year ago, allowing IT departments to integrate its communications solutions as widgets and plug-ins into any number of applications and services. Again, very Web 2.0.

AT&T is no slouch, but Cisco is better coached—especially in the product road map category—and continues to demonstrate the ability to groom its Starting Five for success as business collaboration evolves.

Winner: Cisco

Citrix vs. Atlassian

Atlassian's presence in the tournament may come as a surprise to some, but we argue that its bench is deeper than most might think. Atlassian's Confluence wiki solution is not only the highest quality product on the market, but it is also a collaboration platform.

The recently defined platform-as-a-service delivery model—which is nothing new to the web services market (e.g., Salesforce.com's AppExchange)—is a model Atlassian has embraced since the inception of Confluence. As a truly engineer-friendly platform (our words, not theirs), Atlassian's users can build, share and commercially sell plug-ins within the Confluence community on Atlassian's web site. Notable plug-ins include the IM Presence Plugin (embedded instant messaging supporting AOL IM, Google Talk, ICQ, MSN, Sametime, Skype, Wildfire and Yahoo! Messenger), the WebDAV Plugin (access to operating system-based files, drag-and-drop attachments into Confluence via a file browser such as Windows Explorer) and the Rate Macro, which enables visitors to rate or vote on the quality of page content and displays the results in a table.

Citrix has a strong combination of mobility and communications/conferencing solutions with capable web conferencing products in GoToMeeting and GoToWebinar, and desktop virtualization software in GoToMyPC and EasyCall, an overlay solution that embeds click-to-call functionality in existing business applications. Citrix dominates Atlassian in the real-time and messaging arena, but is outmatched at the community-centric solutions position. Given Atlassian's open platform model, its product road map is essentially whatever its customers want it to be. This model will enable Atlassian to excel in the collaborative web and on-premises services space until it cashes out.

Winner: Atlassian

Avaya vs. Adobe

Avaya holds 21% of the IP telephony equipment market and is the second-most preferred TDM PBX provider for US enterprises behind Cisco. This gives Avaya a strong advantage over Adobe at the real-time and messaging position, considering its core expertise in this area and the fact that 79% of US enterprises agree or strongly agree that IP telephony is the foundation for UC, according to the Yankee Group *Anywhere Enterprise—Large: 2007 US Economics of IP Communications Survey*. Furthermore, Avaya recently announced a much-hyped addition to its squad with its Intelligent Presence Server (IPS) product at VoiceCon 2008. IPS is an aggregator of presence information from both desktop (e.g., Lotus Sametime and Microsoft Office Communications Server [OCS] clients) and telephony sources.

Avaya's one-X UC client application for desktop and mobile devices (supports Symbian, Windows Mobile, RIM, iPhone, Palm, Java and WAP mobile device standards) and its web-based one-X Portal give it a strong advantage over Adobe at both the real-time and messaging and mobile positions on the floor.

However, do not underestimate Adobe. Its suite of online productivity and collaboration tools are all-stars when it comes to user friendliness and user interfaces. Like Google and Zoho, Adobe has embraced rich internet application technology and put together a flashy set of services including Adobe Share (online document storage), Buzzword (shared document editor with multipoint real-time editing and commenting functionality) and Brio (video conferencing with VoIP, screen sharing, whiteboarding and chat functionality). For ad-hoc collaboration at zero cost, Adobe has a strong lineup—but it lacks the integration between each application and the service and support components to make it a feared competitor in the tournament.

Winner: Avaya

Intel/SpikeSource vs. IBM

The Intel-branded social software package SuiteTwo, managed by open-source software distributor/integrator SpikeSource, was put on the business collaboration map at the community-centric solutions position in November 2006. However, the best-of-breed suite of Socialtext's wiki, NewsGator's RSS reader and Six Apart's blogging applications simply places the three applications into a single window with integrated search. And while valuable—albeit limited—as a community-centric collaboration solution, SpikeSource frankly missed its chance to make a significant impact in the market and seems to have limited intentions in becoming what we call an “enlightened suite” (see the February 2008 Yankee Group Report, [Community-Centric Collaboration Heats Up](#)).

The Enterprise 2.0 concept has matured past its disruptive phase to where social features should now be built into collaboration and productivity applications of all kinds. This is not to say that SpikeSource does not customize SuiteTwo to its clients' needs. SpikeSource has integrated SuiteTwo into systems such as Microsoft SharePoint, the Alfresco content management solution and e-mail integration with Exchange and Outlook. Nonetheless, SuiteTwo has three fundamental problems:

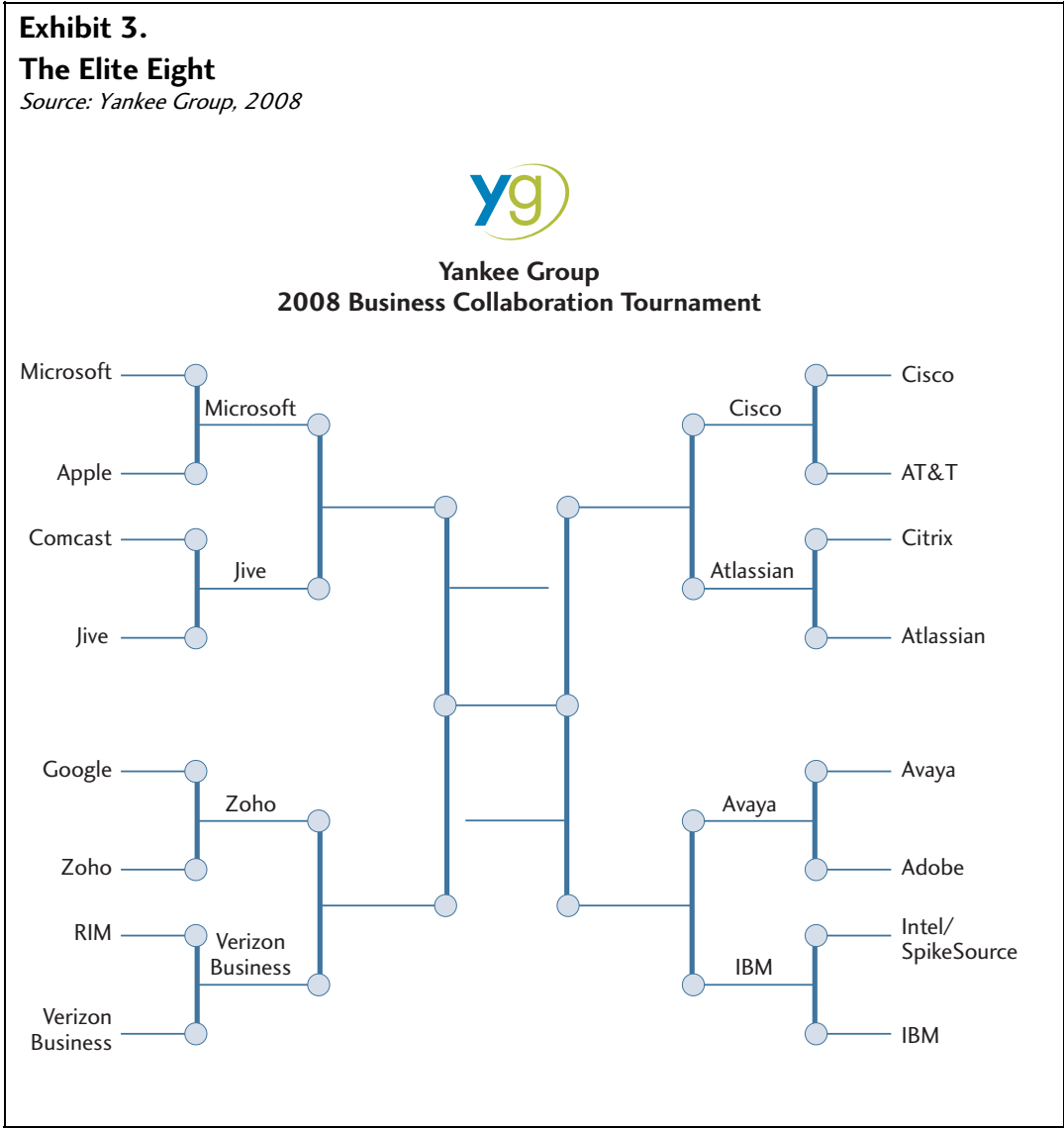
- It is built on the collection of startups. What happens when these companies get acquired or fail?
- SpikeSource's channel Intel has little long-term interest in the business beyond selling the hardware that supports the software. Intel is only willing to bet a small stack of its chips on SuiteTwo.
- Jive's Clearspace, IBM's Lotus Connections and the latest iteration of Microsoft Office SharePoint Server (MOSS) 2007 have accelerated past Intel/SpikeSource in the social software space in the last 6 months.

SpikeSource’s self-proclamation of being as flexible and integration-friendly of a collaboration solution as anyone’s is a tough one to boast against the best systems integrator in the world. IBM’s Starting Five is stacked with its Lotus portfolio of Connections, Quickr and Mashups for community-centric solutions; Sametime and its partner ecosystem for real-time and messaging solutions; and Domino and Traveler for mobile collaboration solutions. This makes IBM’s first matchup against Intel/SpikeSource a slam dunk.

Winner: IBM

III. Round Two: The Elite Eight

Exhibit 3 presents the Round One winners as they progress to their Elite Eight matchups.



Microsoft vs. Jive

Had Microsoft gone another tournament season without learning the web services offense (instead of relying on the “web services do not offer enough functionality for business use” defense), the score between Microsoft and Jive would have been slightly closer. Microsoft recently added Office SharePoint Online (in beta and in the United States only) to its Online portfolio, which already includes the Live Meeting and Exchange Online web conferencing solutions. Microsoft also plans to roll out its UC service Office Communications Server Online in the latter half of 2008 and will internationalize what will become its Business Productivity Online Suite—which includes Live Meeting, Exchange Online (with spam and anti-virus filtering), SharePoint Online and OCS Online—by 2009. These long-awaited moves by Microsoft significantly improve its community-centric and mobile collaboration positions on the court. SharePoint Online may only offer a fraction of the services MOSS 2007 does, but at the very least it is a lightweight community-centric collaboration solution with business-grade SLAs and it demonstrates that Captain Steve Ballmer and Microsoft are finally willing to embrace cloud computing.

Although Jive has delivered Clearspace and Openfire as web services since day one, Microsoft has the advantage of being a globally trusted business products and services provider. And as businesses move from Web 1.0 to Web 2.0 for collaboration purposes, Microsoft will have a much easier time convincing IT departments to migrate to hosted collaboration services than companies like Jive. Microsoft will also be able to sell its Online services as extensions of the familiar Microsoft Office-dominated desktop and SharePoint Server solutions, whereas Jive must convince businesses to move to an entirely unfamiliar environment. However, it is important to note that Jive’s Clearspace 2.0 does have hooks into SharePoint.

In a March 5, 2008 USA Today blog post by Byron Acohido, Jive Chief Strategy Officer Sam Lawrence called Microsoft’s SharePoint “FrankenSuite.” In terms of its usability he is spot-on; but there is a reason we made two of the Starting Five evaluation metrics IT-centric. Microsoft already has its place in nearly 100% of global businesses one way or another, and cloud computing for business has not taken off fast enough for the likes of Jive or Google to usurp Microsoft—one of the kings of the business collaboration court. Although we understand and encourage the adoption of web services for their mobile and community-centric collaboration capabilities, the reality is that IT infrastructures for large and small businesses will continue to run in a hybrid model for years to come. Furthermore, these solutions need to work alongside applications such as Microsoft Outlook—and, to some extent, the entire Microsoft Office suite—to create a truly seamless experience. Microsoft clearly has the advantage here, whether or not Jive can hook into these applications.

After an exciting matchup at the community-centric collaboration position between SharePoint and Clearspace, Microsoft advances to the Final Four. Microsoft dominated Jive at the real-time and messaging position with OCS versus IM-only Openfire. With the additions to its Live portfolio, Microsoft pounded Jive at the mobile solutions position as well, considering its established mobile handset solutions business. We do expect to see Jive in next year’s tournament as its Head Coach and its Starting Five of underclassmen are poised for success with the release of Clearspace 2.0 (April 7, 2008).

Winner: Microsoft

Zoho vs. Verizon Business

This Elite Eight thriller has some interesting mismatches on the floor between the telecommunications powerhouse Verizon Business and the agile web-based collaboration and productivity services provider Zoho. At the services and support and real-time and messaging positions, Verizon's veteran skills are too much for the rookie Zoho to handle. However, at the community-centric solutions positions, Verizon doesn't have a prayer. In terms of IT friendliness, both have their advantages over one another (i.e., Zoho = predictable licensing and maintenance costs, services that do not require any installation; Verizon Business = integration with Microsoft and Cisco products). But this matchup truly gets interesting at the mobile solutions position and between the Head Coaches.

Although mobile collaboration and cellular handhelds go together like the classic pick-and-roll basketball play, the number-one challenge that large as well as small and medium US enterprises face when collaborating is that remote employees don't have the same applications as office workers. Yankee Group considers remote collaboration solutions to be mobile collaboration solutions as well because in this Anywhere era, the term "remote" no longer equates to one or two locations (e.g., the home office and hotel). Given that Zoho delivers an entire suite of collaboration and productivity solutions over the web, a business using Zoho would never face this challenge in a connected workspace. To be clear, however, Zoho's solutions are not just advantageous for highly mobile and distributed workforce collaboration; Zoho's solutions are business-grade and its engineers are strictly focused on serving SMBs. Verizon Business does beat Zoho at the mobile solutions position considering its cellular network offerings and hosted services, but only by a small margin.

Both Zoho and Verizon Business have demonstrated to Yankee Group that they have dedicated the necessary and appropriate resources to business collaboration as it relates to their respective strategies. Verizon Business' long-term viability score is higher than Zoho's, but Zoho's mid-2006 rejection (among others) of a Salesforce.com bid demonstrates that Zoho is not just looking to make some quick cash. Zoho has told Yankee Group that it has no intentions of being bought out and we expect its parent company AdventNet to continue to fund Zoho as needed.

In the end, Zoho squeaks by Verizon Business into the Final Four and continues its Cinderella run in the Yankee Group 2008 Business Collaboration Tournament due to its product road map. Without a focus on community-centric solutions, Verizon Business' game is too communications-centric and therefore too old-school to make it to the Final Four in 2008.

Winner: Zoho

Cisco vs. Atlassian

Cisco is a nearly impossible opponent for Atlassian to defeat in this second round, but the game must be played and Atlassian's appearance in the Elite Eight is a victory in itself.

Atlassian's community-centric wiki platform Confluence is browser-based and therefore innately mobile (whether delivered on or off premises). When customized with the instant messaging, user ratings, task lists, calendaring, Microsoft Office "send to wiki" and social bookmarking plug-ins, Confluence is an impressive lightweight collaboration tool for laptop and desktop use. However, Atlassian's mobile capabilities only go this far and do not reach handheld devices outside of mobile browsers. This hurts Atlassian in a matchup with Cisco, whom it could potentially beat if it had a strategic mobile handset solution.

Any collaboration fan knows that Atlassian does not match up well with Cisco at the real-time and messaging position. But while Cisco's primary play in the business collaboration space is in UC, Cisco's 2007 acquisition of WebEx improves the networking giant's Big Three with web-based conferencing, messaging services and community-centric solutions that include WebEx Meeting Center, WebEx AIM Pro Business Edition (Instant Messaging) and WebEx WebOffice. WebEx WebOffice is a shared workspace tool with calendaring, document sharing, web meetings with screen sharing functionality, a web-based database creation tool and a team task management portal. Web conferencing is the most important conferencing tool for improving productivity, according to US IT decision-makers surveyed in the Yankee Group *Anywhere Enterprise—Large: 2007 US Economics of IP Communications Survey*, and WebEx Meeting Center is arguably the best web-conferencing solution on the market.

Yankee Group believes that the guaranteed winners of future Business Collaboration Tournaments will be those that bring each of the Big Three together cohesively and seamlessly. In other words, delivering business collaboration should be a team effort. Cisco has demonstrated a commitment to removing collaboration silos and doing just that.

Cisco's vision—which aligns with Yankee Group's vision of unifying the workspace across clients, applications, devices, operating systems and networks—comes to fruition with the integration of WebEx, Cisco IP phones and Lotus Notes or Microsoft Outlook. With a WebEx contract, businesses with Cisco IP phones can enable end users to schedule web conferences via WebEx from their desktop phone (or soft phone) with anyone in their directory. Cisco has also built WebEx plug-ins into Lotus Notes and Microsoft Outlook to enable WebEx scheduling from those applications as well. This demonstrates Cisco's ability to execute on its vision, whether built in-house, through acquisition or through its partners. This example also lends itself to Cisco's perfect 5/5 score at the IT friendliness position.

For these reasons, Atlassian is simply outcoached and outplayed in this round.

Winner: Cisco

IBM vs. Avaya

IBM and Avaya are known to play cooperatively in the real-time and messaging solutions arena via partnerships (e.g., Sametime Unified Telephony). However, in this Elite Eight head-to-head contest, Avaya cannot compete with IBM's Lotus portfolio.

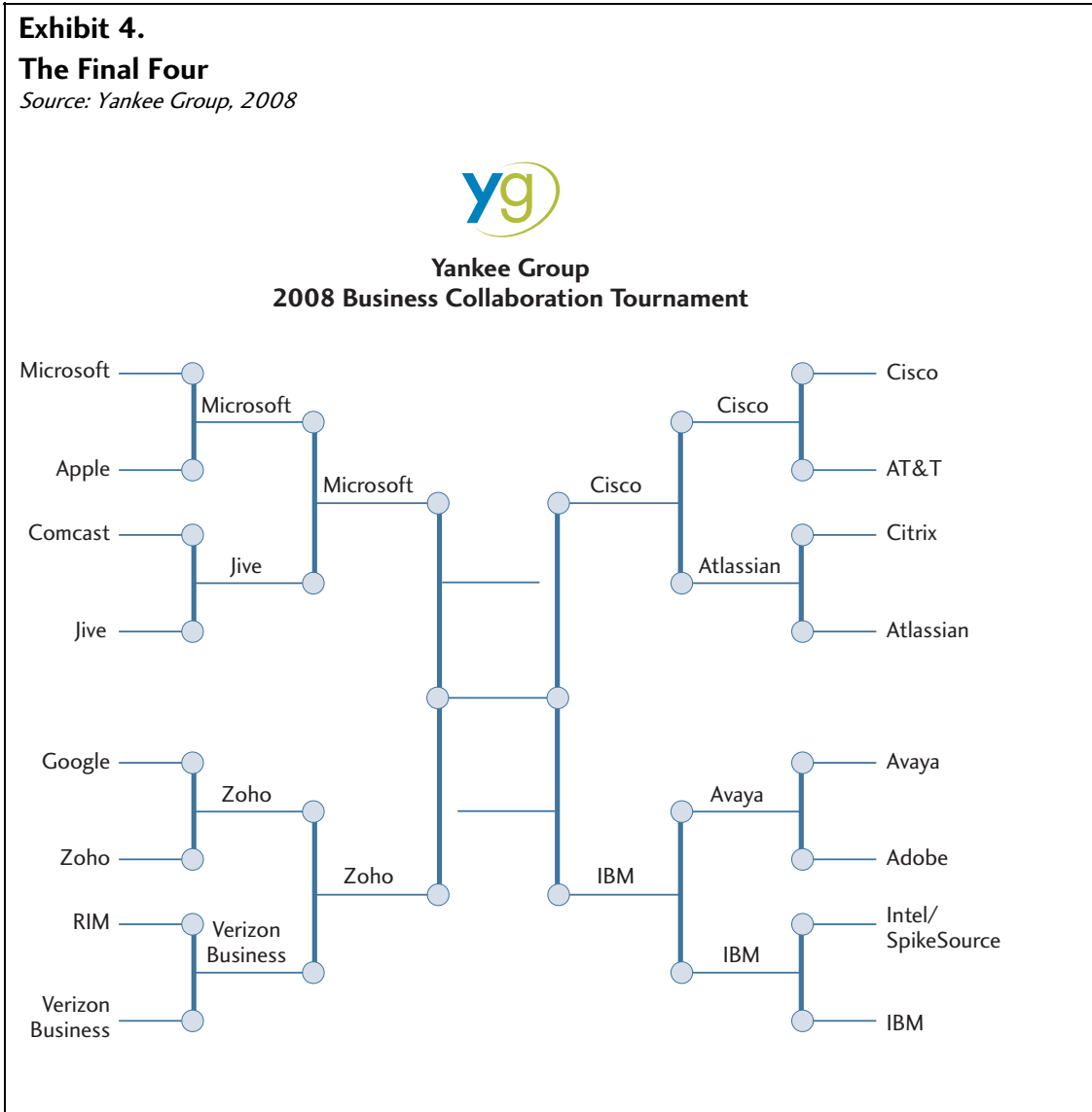
Avaya's expertise in voice collaboration solutions such as fixed-mobile convergence (FMC) and speech command tools give it an advantage over IBM in this space (hence the reason IBM partners with Avaya to provide IP telephony capabilities). But within Yankee Group's defined real-time and messaging collaboration solutions bucket, voice is only a single component. Voice is only a single component of UC as well. Moreover, on March 10, 2008, Steve Mills, the senior vice president of IBM's software group, announced a \$1 billion pledge to IBM's UC strategy during the next 3 years. In this matchup, the real-time and messaging solutions space is the only area where Avaya has a prayer to outscore IBM. In 2 to 3 years, we do not expect this to be the case. Avaya should develop its sweet spot with products such as Intelligent Presence Server, and continue to focus on IP telephony services and not on solutions such as its one-X Portal, for example.

But in this year's Elite Eight contest between Avaya and IBM, it is the IBM Lotus social software suite of social networking, bookmarking tools and blogs dubbed Connections that pushes IBM into the Final Four. Avaya may play a role in IBM's community-centric solutions with click-to-call functionality embedded in Connections, for example, but it has no community-centric products of its own. Avaya excels at the IT friendliness and service and support positions and is well coached, but its product road map is too limited to be a contender for the title. This is not to say that we advise Avaya to build a social software suite of its own. In fact, we would advise it not to. However, Avaya should find and pursue its role in tools and applications such as wikis and social networks. At the very least, Avaya needs to demonstrate to its partners and to its customers that it has an understanding of the inevitable socialization of the entire business collaboration ecosystem.

Winner: IBM

IV. Round Three: The Final Four

Exhibit 4 presents the Round Two winners as they progress to the Final Four.



Microsoft vs. Zoho

Just as the NCAA Final Four is the pinnacle of the college basketball season, for business collaboration fans, this is the main event. We begin with a highly anticipated battle between a business collaboration perennial powerhouse and this year's Cinderella. Collaboration fans are wondering whether Zoho's web-based (and therefore highly mobile) collaboration solutions, at the dawn of the Anywhere era, have what it takes in 2008 to knock off Microsoft? Probably not, but the only way to find out is to let the two vendors duke it out.

As we discussed during the Microsoft/Jive matchup in the Elite Eight, Microsoft's recent development of its Online portfolio, which is being marketed as an extension to Office and SharePoint, results in an attractive software plus services package. Microsoft also recently released Office Live Workspace, which makes it easier for Office users to share files online. Office Live Workspace even adds a toolbar to Office applications to save to this service directly, making the process seamless. However, this creates a problem: End users wind up working and collaborating in two different environments—one in the cloud and one on their individual PCs. Because Zoho's services are completely browser-based (it is worthy to note here that offline access is available for Zoho Writer only at this time), its productivity and collaboration solutions are one in the same. For business collaboration purposes, this may be a more compelling argument than Microsoft's software plus services approach for some despite Zoho's inferior technical capabilities to Microsoft's desktop and server solutions. Zoho does offer Microsoft Office plug-ins for Word and Excel so that users can edit Zoho documents and spreadsheets within those applications.

But while we give Zoho the nod in the web services realm, Microsoft has its own—albeit closed—operating system for mobile devices in Windows Mobile. Collaboration fans might argue that Zoho offers mobile solutions on Windows Mobile and iPhone devices as advertised, but these are difficult to use in a mobile browser and are not client-based applications. Solutions developed for laptops and desktops and solutions built for mobile devices are not and should not be viewed the same (see the January 2008 Yankee Group Report, [Web 2.0 Tools Must Reach the Handheld](#)). Furthermore, the most valuable and most widely used collaboration tools on mobile devices are communication solutions (e.g., voice, e-mail and IM). Zoho does not have the capabilities to offer these services. Microsoft's Windows Mobile Certified Software Catalog offers a number of client-based collaboration applications including IM+ All-in-One Messenger (MSN/Windows Live Messenger, Yahoo!, AIM/iChat, ICQ, Jabber and Google Talk). Microsoft also delivers Office Communicator Mobile on Windows Mobile devices.

Zoho's product road map is to evolve as SMB IT needs evolve and Zoho has proven itself capable to react quickly to the needs of its customers. And like Atlassian, Salesforce.com and Google, Zoho has a platform-as-a-service play in Zoho Creator as well. Zoho Creator enables end users and third parties to build database applications on the Zoho platform without any coding skills. Currently, the Zoho Creator community has created a library of more than 60,000 publicly available applications.

Zoho is a Web 2.0 first-team all-star and in the free collaboration tools realm, it can't be beat. But Microsoft—especially with its recent UC push—has comprehensive solutions at every spot on the floor. It needs some development in certain business collaboration skill sets, but as a team Microsoft is as formidable an opponent as any vendor in the history of business collaboration.

Winner: Microsoft

Cisco vs. IBM

After a thrilling Final Four opener between a new kid on the block and a business collaboration tournament regular, game two of this year's Final Four has collaboration fans on the edge of their seats. Cisco and IBM both bring the business collaboration game to new heights, and fans can expect this matchup to be decided in the final minute and by a slim margin.

In the lightweight web conferencing space, both Cisco and IBM made important acquisitions in 2007. Cisco acquired WebEx, and IBM acquired WebDialogs Inc. in August, 2007 and now offers Lotus Sametime Unyte, a SaaS web-conferencing solution. These were very important signings for both parties considering the importance of web conferencing to both end users and IT decision-makers for collaboration purposes.

At the real-time and messaging solutions position, Cisco has an advantage over IBM with its telephony, video and conferencing expertise. This is Cisco's core business in business collaboration, and IBM partners with Cisco for its Sametime Unified Telephony, unified messaging and Lotus Notes offerings for a reason. Cisco adds click-to-call functionality to IBM's Sametime, Microsoft's OCS and of course its own Cisco Unified Personal Communicator (CUPC) application. Furthermore, Cisco's TelePresence high-end video conferencing solution—despite its unaffordable price point for 99% of organizations—takes real-time collaboration to an unprecedented level. Organizations that have justified the investment in TelePresence—especially during times of rising fuel costs for companies with frequent travelers—are raving about its collaborative benefits.

Cisco is intent on making video conferencing the next big thing in collaboration, whether it be on the desktop, from a Cisco IP phone or in an \$80,000 to \$300,000 TelePresence room. Although this is a very environmentally friendly approach, it has yet to be determined how important ad-hoc video conferencing will become to business collaboration in the Anywhere era. This is not to say that video conferencing is not or will not be important to business collaboration. In fact, video conferencing is and will become a killer solution for distributed organizations as Cisco can testify, considering its internal usage of its TelePresence units. But in many cases, IM, e-mail or a quick phone call will still be more efficient collaboration channels. Not everyone wants to be seen every time they collaborate.

IBM's approach to supporting the Anywhere Enterprise is a bit different. IBM is heavily invested in solving the problems that many distributed organization face when collaborating beyond presence, including a decentralized knowledge base, an inability to locate experts, and an inability to locate the relevant content and content owners where and when you need them. IBM Lotus Director of Strategy Doug Heintzman calls this "collaboration in context." These are very important issues that enterprises need to resolve, and IBM has taken the lead in the market on solving them via its community-centric solutions and by developing integration points between real-time and messaging solutions (such as Lotus Notes) with its social networking, tagging and bookmarking features in Lotus Connections.

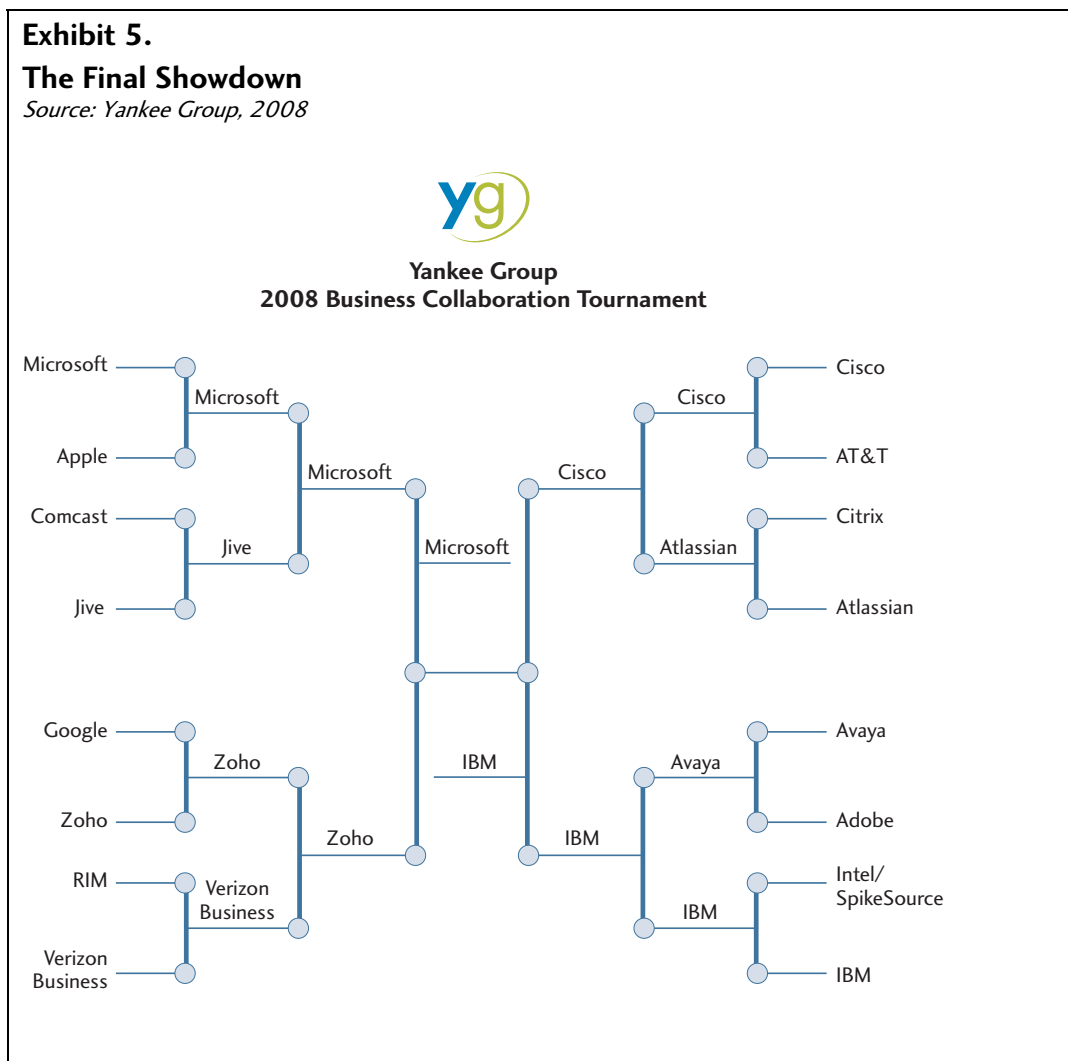
Both Cisco and IBM offer comparable UC solutions for handhelds at the mobile collaboration solutions position, but Cisco gets the nod by a slim margin thanks to its deeper web services portfolio in WebEx. But the most difficult matchup for Cisco in this Final Four battle is at the community-centric position.

Cisco plans to add some very interesting Web 2.0 elements to its Unified Communications Manager 7.0 release later this year, including communications plug-ins and widgets. And its WebEx arm is currently beta-testing a team site/mashup builder product. But because these have yet to be released, it hurts Cisco's community-centric score in this year's tournament. On the other hand, IBM Lotus' Doug Heintzman claims that the company's market-leading (in terms of functionality) community-centric collaboration suite Lotus Connections is "the most successful new product IBM software has ever had in terms of the speed of adoption." And this is across all of the major industry verticals. Lotus Connections is a cohesive social suite of blogs (Blogs), social bookmarking (Dogear), team sites (Communities) and—at its core—a social network (Profiles and Activities). IBM is the clear leader in the space, and the Lotus Connections product at the community-centric position (along with Lotus Quickr and Mashups) pushed IBM into the title game against Microsoft.

Winner: IBM

V. The Final Showdown

Exhibit 5 presents the Round Three winners as they progress to the Final Showdown.



Microsoft vs. IBM

This is it, fans—the final showdown between two historic rivals. It is the Duke versus University of North Carolina of business collaboration. And while Microsoft won the PC versus mainframe war of the 1980s and has dominated the desktop market for years, in business collaboration we have entered a new era beyond the Outlook vs. Notes game. This era will be defined by Anywhere computing and communication, and is being transformed by the doctrine of Web 2.0. The winners in this sport will be the ones that transform somewhere enterprises into Anywhere Enterprises, and transform mobile and telecommuters into Anywhere workers. Now, back to the action...

Both Microsoft and IBM are dear friends of IT, are experts in service and support, and have some of the best coaches in the game. Each has a team philosophy for collaboration, meaning that both understand the need to blur the lines between each position on the floor to adopt a truly cohesive team-oriented approach to business collaboration. Where they differ is that IBM plans to do this in an open, partner-oriented environment while Microsoft hopes to reign supreme on its own with very little help from others (e.g., Live Communications Server [LCS] and the Windows Mobile ecosystem). And while Microsoft has yet to prove itself on its own in the real-time communications arena, both IBM and Microsoft have strategic partnerships with the Ciscos, Avayas and Nortels of the world. The matchups that will tell the tale of this year's business collaboration championship are at the mobile collaboration solutions and community-centric collaboration solutions positions.

Microsoft would seem to be the clear winner in the mobile space with its Business Productivity Online Suite and Windows Mobile ecosystem, but IBM's recent mobile initiatives are noteworthy. (It is important to note here that we are not necessarily advocating for closed ecosystems like Windows Mobile, but instead are pointing to Microsoft's mobile capabilities.) IBM's Lotus Notes Traveler for Windows Mobile 5 and 6 devices gives users real-time replication of Lotus Domino e-mail (including attachments), calendar, address book, journal and to-do lists. IBM fans can finally rejoice now that Sametime Mobile has a teammate on the Windows Mobile device. However, IBM still relies on its partnerships with BlackBerry, Motorola, Nokia, Visto, CommonTime and Sybase to provide the middleware server integration to deliver Domino data to those devices. We are not negating the value of these partnerships whatsoever. We just believe that IBM has very little control of the user experience on devices where there is no native client application built by IBM itself. Furthermore, IBM Lotus' Bluehouse off-premises SaaS collaboration offerings aimed at SMBs do not stack up to Microsoft's Live and Online portfolios this year. Therefore, Microsoft's mobile collaboration solutions trump IBM's.

At the community-centric solutions position, Microsoft will claim that anything Lotus can do SharePoint can do. But this is simply not true. For collaboration purposes, SharePoint versions before the latest MOSS 2007 were poor products worthy of a 1 at best at the community-centric position. Even as a document management solution, SharePoint was clunky. But MOSS 2007 is a much improved collaboration platform and integrates tightly with Office 2007. This tight integration bridges the gap between the age of document-centric collaboration and the nascent but upcoming age of community-centric collaboration (see the February 2008 Yankee Group Report, [Community-Centric Collaboration Heats Up](#)). Though not a surprise, SharePoint is still too document-centric.

IBM has taken the lead in social computing for enterprises with Lotus Connections. For instance, the blog template in SharePoint doesn't have a fraction of the functionality of Blogs in Connections, nor is My Sites in SharePoint a comparable social networking solution to Profiles and Activities. But solutions such as Jive's Clearspace, Atlassian's Confluence and NewsGator's Social Sites hook into the SharePoint ecosystem, giving Microsoft customers some quality alternatives to Lotus Connections. According to Microsoft, SharePoint just passed 100 million licenses, 17,000 user companies and \$1 billion in SharePoint sales revenue in March 2008. Because of its strategic partnerships with some of the best community-centric solutions on the market, Microsoft can bump its community-centric solutions score up just enough to give it the highest Business Collaboration Score in the tournament.

And with that, we have our winner...

The Yankee Group 2008 Business Collaboration Tournament Champion: Microsoft

VI. Post-Tournament Awards, Analysis and Recommendations

All-Tournament Team at the Big Three (and Honorable Mentions)

- **Community-Centric Collaboration Solutions:** Jive
 - **Honorable Mention:** IBM
- **Real-Time and Messaging Collaboration Solutions:** Cisco
 - **Honorable Mentions:** AT&T, Verizon Business, Avaya, IBM, Microsoft
- **Mobile Collaboration Solutions:** Microsoft
 - **Honorable Mentions:** Cisco, Avaya, Google, IBM
- **Collaboration Coach of the Year:** Cisco
 - **Honorable Mentions:** IBM, Microsoft

Post-Tournament Analysis

The most important takeaway from the inaugural Yankee Group Business Collaboration Tournament is that with all the business benefits of ubiquitous connectivity, and with all the revolutionary changes to business operations as we know them in the Anywhere era, collaboration must be high on the executive priority list. If businesses don't prioritize collaboration, their competition will outperform, outinnovate and outlast them. Collaboration solutions are to the virtual world what vocal cords and handshakes (or bows) are to in-person meetings. Do you want to be a company without virtual vocal cords?

With that said, business collaboration can be approached in many different ways by organizations and individuals alike. This is proven by the different approaches both legacy and startup providers are taking today to serve their target markets. All of the 16 vendors evaluated in this Yankee Group Report have their place in the business collaboration space. The objective of this Report is not only to crown a victor with the most comprehensive solution set, but to also dive into and expose the ways certain tools are more advantageous to certain types of organizations than others (e.g., lightweight web services for SMBs versus highly secure on-premises solutions for a financial services MNC). Businesses have different requirements and highly disparate IT infrastructures; and because of this, we are not advocating for businesses to rip and replace and go with Microsoft. However, Microsoft is the champion of business collaboration in 2008—but only by a buzzer-beater thanks to its expansion into the web services realm and some strategic partnerships and social software hooks into SharePoint (see Exhibit 6 for Business Collaboration Scores).

Exhibit 6.**Business Collaboration Scores Index***Source: Yankee Group, 2008*

Vendor	Community-Centric Solutions (25%)	Real-Time and Messaging Solutions (25%)	Mobile Solutions (25%)	IT Friendliness (12.5%)	Service and Support (12.5%)	Starting Five Score
Microsoft	3.75	4.00	4.50	5.00	5.00	86.00
IBM	4.25	4.00	3.75	5.00	5.00	85.00
Cisco	2.50	5.00	4.00	5.00	5.00	83.00
Zoho	3.00	2.50	3.50	4.00	2.00	60.00
Verizon Business	0.00	4.00	3.50	4.00	5.00	60.00
Avaya	0.00	4.00	4.00	4.00	5.00	63.00
Atlassian	2.50	1.00	2.50	4.00	3.00	48.00
Jive	5.00	1.00	2.50	4.00	3.00	60.00
AT&T	0.00	4.00	3.00	4.00	5.00	58.00
Apple	1.50	2.00	2.50	1.50	3.00	41.00
Google	3.00	2.00	4.00	5.00	2.00	63.00
Adobe	2.00	1.50	2.00	4.50	3.50	48.00
Comcast	3.00	2.00	2.00	3.00	4.00	53.00
RIM	1.00	1.00	2.00	5.00	5.00	45.00
Citrix	0.00	2.50	3.00	3.00	3.00	43.00
Intel/SpikeSource	3.00	1.00	1.00	4.00	4.00	45.00

Recommendations for Businesses

- **Use the Yankee Group framework, but weight your Starting Five relative to your unique needs.** To determine your own enterprise, mid-market or SMB collaboration strategy, we recommend using the framework we established in this Report. All organizations should evaluate their social and mobile strategies. These will become critical solutions as businesses and their employees become more distributed and more mobile in the Anywhere era. With that said, we recognize that the needs and IT infrastructures of individual businesses vary significantly. Therefore, we recommend that businesses apply their own weights to their Starting Five.

- **SMBs should embrace web services.** SMBs must start taking a serious look at the Zohos, Jives, Googles and Atlassians of the world. Despite the fact that SMBs stand to reap the most benefits from SaaS, considering their frustrations and limitations, the Yankee Group *Anywhere Enterprise—Small and Medium: 2007 US Mobility and Business Applications Survey* indicated that only 17% of US-based SMBs have adopted SaaS. Cloud computing is here to stay and SMBs can relieve many of their collaboration limitations by using web services (see the January 2008 Yankee Group Report, [SaaS Will Swim the SMB Channel](#)).

Recommendations for Vendors

- **Transcend your roots.** It doesn't matter what your company's heritage is (e.g., voice, middleware, productivity applications or web services). What matters is your ability to transcend those roots via product development or partnership to offer a well-rounded suite that encompasses all aspects of collaboration discussed in this Report. Those with limited expertise at certain positions on the floor need to demonstrate to the market, customers and partners that business collaboration is more than the network or the desktop or the mobile device. It is a combination of all of these things integrated with one another.
- **Cooperate to provide first-class collaboration solutions.** Cisco envisions a consistent and seamless user experience across all clients, applications and even operating systems (e.g., on March 26, 2008, Cisco announced cross-platform support for Mac OS X Leopard and Safari 3 for its WebEx services), and understands that this can only be achieved in a multivendor environment. We believe that without cooperation between community-centric-focused vendors, real-time and messaging-focused vendors, and mobility-focused vendors, business collaboration will become increasingly complex for end users and IT. When you add the consumerization element (i.e., employees bringing consumer devices and applications to work for work purposes), collaboration among employees becomes all the more difficult. Although Microsoft has the depth and breadth of expertise and services to take a shot at the entire gamut of business collaboration solutions, it will be fighting an uphill battle.
- **Telcos should get Web 2.0.** The likes of Verizon Business and AT&T need to start thinking "social," especially for their core network-driven businesses such as cellular voice and data solutions. Telecommunications providers should ask themselves how services such as SMS can become integrated into the fabric of an organization's social network. Should they start offering tagging functionality in their mobile voicemail services? These are the ways in which telcos can get themselves out of the old world order of voice and into the new world order of holistic business collaboration.

VII. Further Reading

Yankee Group Link Research

[Community-Centric Collaboration Heats Up](#), Report, February 2008

[SaaS Will Swim the SMB Channel](#), Report, January 2008

[Exposing the Age-Old Lie of Social Software Adoption](#), Note, October 2007

[The Dark Side of the Distributed Workforce: Overcoming Employee Alienation in the Enterprise](#), Report, August 2007

Yankee Group

Yankee Group has research and sales staff located in North America, Europe, the Middle East, Africa, Latin America and Asia-Pacific. For more information, please contact one of the sales offices listed below.

Corporate Headquarters

Prudential Tower
800 Boylston Street
27th Floor
BOSTON, MASSACHUSETTS 02199
617-598-7200 phone
617-598-7400 fax
info@yankeegroup.com

Europe

56 Russell Square
LONDON WC1B 4HP
UNITED KINGDOM
44-20-7307-1050 phone
44-20-7323-3747 fax
euroinfo@yankeegroup.com

Yankee Group | the global connectivity experts™

A global connectivity revolution is under way, transforming the way that businesses and consumers interact beyond anything we have experienced to date. The stakes are high, and there are new needs to be met while power shifts among traditional and new market entrants. Advice about technology change is everywhere—in the clamor of the media, the boardroom approaches of management consultants and the technology research community. Among these sources, Yankee Group stands out as the original and most respected source of deep insight and counsel for the builders, operators and users of connectivity solutions.

For 37 years, we have conducted primary research on the fundamental questions that chart the pace and nature of technology changes on networks, consumers and enterprises. Coupling professional expertise in communications development and deployment with hundreds of interviews and tens of thousands of data points each year, we provide qualitative and quantitative information to our clients in an insightful, timely, flexible and economic offering.

Yankee Group Link

As technology connects more people, places and things, players must confront challenging questions to benefit from the changes: which technologies, what economic models, which partners and what offerings? Yankee Group Link™ is the research membership uniquely positioned to bring you the focus, the depth, the history and the flexibility you need to answer these questions.

Yankee Group Link membership connects you to our qualitative analysis of the technologies, services and industries we assess in our research agenda charting global connectivity change. It also connects you to unique quantitative data from the dozens of annual surveys we conduct with thousands of enterprises and consumers, along with market adoption data, comprehensive forecasts and global regulatory dashboards.

Yankee Group Link Research

As a Link member, you have access to more than 500 research reports and notes that Yankee Group publishes each year. Link Research examines current business issues with a unique combination of knowledge and services. We explore topics in an easy-to-read, solutions-oriented format. With the combination of market-driven research and built-in direct access to Yankee Group analysts, you benefit from the interpretation and application of our research to your individual business requirements.

Yankee Group Link Interaction

Our analysts are at your further disposal with data, information or advice on a particular topic at the core of a Link membership. We encourage you to have direct interaction with analysts through ongoing conversations, conference calls and briefings.

Yankee Group Link Data

Yankee Group Link Data modules provide a comprehensive, quantitative perspective of global connectivity markets, technologies and the competitive landscape. Together with Link Research, data modules connect you to the information you need to make the most informed strategic and tactical business decisions.

Yankee Group Consulting

Who better than Yankee Group to help you define key global connectivity strategies, scope major technology initiatives and determine your organization's readiness to undertake them, differentiate yourself competitively or guide initiatives around connectivity change? Our analysts apply Yankee Group research, methodologies, critical thinking and survey results to your specific needs to produce expert, timely, custom results.

Yankee Group Signature Events

Yankee Group conferences, webinars and speaking engagements offer our clients new insight, knowledge and expertise to better understand and overcome the obstacles to succeed in this connectivity revolution.

www.yankeegroup.com

The people of Yankee Group are the global connectivity experts™—the leading source of insight and counsel for builders, operators and users of connectivity solutions. For more than 35 years, Yankee Group has conducted primary research that charts the pace of technology change and its effect on networks, consumers and enterprises. Headquartered in Boston, Yankee Group has a global presence including operations in North America, Europe, the Middle East, Africa, Latin America and Asia-Pacific.