August 5, 2011

The Forrester Wave™: Mobile Collaboration, Q3 2011
by Ted Schadler
for Content & Collaboration Professionals
EXECUTIVE SUMMARY

Mobile collaboration means putting collaboration workloads onto all-important smartphones and tablets, then delivering a great user experience anywhere, anytime, on any device. This is a high bar to clear, but we found 13 vendors able to clear it. In Forrester’s 15-criteria evaluation of mobile collaboration vendors, we found that Adobe, Box, Cisco, IBM, salesforce.com, SugarSync, Skype, and Yammer led the pack because of their commitment to tablets and smartphone platforms as well as a strategy aligned with the needs of the mobile workforce: low latency, cloud reach, and platform support. We also found many Strong Performers — AT&T, Citrix, Dropbox, Evernote, and Google. In this handpicked group of mobile collaboration vendors, no vendor slipped into the Contender or Risky Bet categories — at least as it relates to mobile support.

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NOTES & RESOURCES

Forrester conducted product evaluations in May 2011 and interviewed 13 vendor companies: Adobe, AT&T, Box, Cisco, Citrix Online, Dropbox, Evernote, Google, IBM, salesforce.com, SugarSync, Skype, and Yammer.

Related Research Documents
“Mobilize Your Collaboration Strategy”
July 13, 2011
“Demystifying The Mobile Workforce”
June 7, 2011
“The Internet Crushes The Work/Life Boundary”
March 17, 2011
MOBILE COLLABORATION REQUIRES A NEW APP APPROACH

When work is a thing you do rather than a place you go, you know you are living in a work-anywhere world. Already, when your most productive employees use four devices to get work done, client/server solutions with on-premises servers are inadequate, simply not responsive or agile enough for escalating user requirements and expectations.

Instead, the future belongs to a new application architecture that Forrester calls the mobile app Internet, defined as “an architecture of native apps on smart mobile devices linked to cloud-based services that provide a context-rich experience anytime, anywhere.” In this architecture, where user expectations for quality and latency are very high, the winning mobile collaboration solutions are:

- **Designed to run well on any mobile device.** With so many different mobile platforms and form factors to target, vendors will have to organize differently, code differently, and execute differently. Design skills grow ever-more important (and scarce); new abstraction layers that separate presentation from interaction from back-end services are required; and teams must design for mobile first. Startups have an easier time with this new approach than established vendors.

- **Delivered as a cloud service.** Latency is already a problem for distributed organizations. Even waiting for email to upload or download to a remote site can be painful. And access to team sites and even the file system from a hotel room over a virtual private network (VPN) can be excruciatingly slow. The problem is the lack of capacity, bandwidth, and data close to the device. The solution is cloud suppliers with data centers around the world and points of presence in every major city. The cloud is simply better for delivering good mobile app experiences.

HOW WE SELECTED AND EVALUATED MOBILE COLLABORATION VENDORS

To assess the state of the mobile collaboration market and see how the vendors stack up against each other, Forrester evaluated the mobility strengths and weaknesses of the vendors that our clients are asking most about. We included vendors in four collaboration categories: document-based collaboration, webconferencing, videoconferencing, and activity streams. We limited the vendors to those with native apps on more than one mobile operating system (AKA mobile platform) with a cloud solution and market experience, which means we left some vendors out, including Apple, Microsoft, and RIM.

We evaluated only the mobile characteristics, not the collaboration category features. In any vendor selection you must of course evaluate factors like platform alignment, product features, and the vendor's enterprise readiness, platform support, and cloud reach (see Figure 1).
Fifteen Criteria Define The Evaluated Vendors’ Mobile Capabilities

After discussions with hundreds of companies and dozens of vendors, we developed and tested a set of evaluation criteria focused on mobility. We did not include criteria to evaluate the individual categories. You should view this evaluation as an adjunct to your process; these are the mobile criteria that you should include in any collaboration evaluation. We evaluated the products against 15 mobile criteria, which we grouped into three high-level buckets:

- **Current offering.** How well does the solution meet the current needs? These criteria include the smartphone and tablet platforms as well as the desktop and browser support. We also included criteria to evaluate security and administration features. Finally, we relied on a neutral data source — Apple App Store reviews — to evaluate the user experience and popularity of the offerings.4

- **Strategy.** This bucket includes factors that establish a vendor’s strategic intent with mobility. Does the company have a mobile app Internet architecture with the right balance between cloud services and local apps? Does the mobile development team report to a senior executive? How long has the company had a mobile solution?
Market presence. Traditionally, this factor is a proxy for the size of the vendor and some measure of their market share. In this evaluation, we focused much more on the mobile market presence: Does the vendor have a lot of mobile users? Some vendors were reluctant to share mobile app download or mobile customer data. Forrester thinks that you should care about these measures of mobile success.

Mobile Collaboration Vendors Deliver Solutions On Multiple Smartphones And Tablets

Email has been a “killer” mobile collaboration app since 1998 when RIM first launched BlackBerry — and it still is: Eighty-seven percent of smartphone workers use email on their devices, and collectively they do 32% of their email on a smartphone. But with the advent of the Apple iPhone and the subsequent stampede of smartphones and now tablets, the collaboration solution set has expanded dramatically. We’ve chosen to evaluate the most important mobile collaboration categories and vendors that content and collaboration professionals are asking about. We included enterprise vendors as well as startups with a strong “consumerization brand,” meaning that they are already providing solutions to your workforce even if you haven’t provisioned it. Not all of these vendors have the enterprise maturity that you crave, but they are part of your employees’ tool set whether you like it or not.

Forrester included 13 vendors in the assessment: Adobe, AT&T, Box, Cisco, Citrix, Dropbox, Evernote, Google, IBM, salesforce.com, Skype, SugarSync, and Yammer. Each of these vendors has (see Figure 2):

• A solution that runs on more than one mobile platform. We now live and will always live in a multidevice world, where companies and consumers choose different smartphone and tablet platforms and expect to get apps on all of them. This means that companies need vendors that already support the most important mobile platforms: iOS, Android, and RIM, as well as Windows and Macintosh computers and the common browsers. We restricted the vendors evaluated to those with existing multiplatform solutions.

• A cloud-based solution that supports wireless access from anywhere. In the multidevice workplace, client/server architectures are dead, replaced by a new architecture that Forrester calls the mobile app Internet, where native apps and cloud services combine to deliver great user experiences anywhere, anytime, on any device. An on-premises solution, with its limited access and bandwidth-constrained network, isn't well suited to deliver that experience.

• Two or more years of mobile experience. Mobile collaboration solutions are advancing rapidly and many vendors offer pieces of the solution. We restricted the evaluation to vendors with two or more years of mobile experience because they are the ones that our clients most frequently ask about.
Does this mean that your on-premises collaboration platform suppliers can’t deliver mobile experiences? Of course not. But for the kinds of advanced collaboration tools that companies increasingly rely on — conferencing, document-based collaboration, social tools, and activity feeds — the cloud is a better architecture for great user experiences. The alternative is to put a giant pipe into your data center and make sure your network provider has points of presence and gateways to wireless networks everywhere your employees want to work.

**Figure 2** Evaluated Vendors: Product Information And Selection Criteria

<table>
<thead>
<tr>
<th>Vendor</th>
<th>Product evaluated</th>
<th>Mobile app launch date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adobe</td>
<td>Connect Mobile</td>
<td>February 2010</td>
</tr>
<tr>
<td>AT&amp;T</td>
<td>Connect</td>
<td>December 2009</td>
</tr>
<tr>
<td>Box</td>
<td>Box Mobile</td>
<td>October 2007</td>
</tr>
<tr>
<td>Cisco</td>
<td>WebEx</td>
<td>January 2009</td>
</tr>
<tr>
<td>Citrix</td>
<td>GoToMeeting</td>
<td>April 2010</td>
</tr>
<tr>
<td>Dropbox</td>
<td>Dropbox</td>
<td>November 2009</td>
</tr>
<tr>
<td>Evernote</td>
<td>Evernote</td>
<td>2008</td>
</tr>
<tr>
<td>Google</td>
<td>Google Apps For Business</td>
<td>April 2010</td>
</tr>
<tr>
<td>IBM</td>
<td>LotusLive Meetings</td>
<td>2009</td>
</tr>
<tr>
<td>Salesforce</td>
<td>Chatter</td>
<td>2006</td>
</tr>
<tr>
<td>Skype</td>
<td>Skype</td>
<td>2006</td>
</tr>
<tr>
<td>SugarSync</td>
<td>SugarSync</td>
<td>2008</td>
</tr>
<tr>
<td>Yammer</td>
<td>Yammer</td>
<td>September 2008</td>
</tr>
</tbody>
</table>

**Vendor selection criteria**

- Does the solution run natively on two or more mobile platforms?
- Does the vendor offer a cloud-based solution?
- Does the vendor have a history of mobile device support?
- Are Forrester’s clients asking about this product and vendor?

Source: Forrester Research, Inc.
STARTUPS AND SOME ESTABLISHED VENDORS LEAD IN MOBILE COLLABORATION

We only invited mobile-focused collaboration vendors to participate, so it’s no surprise that the scores are high and cluster in the Leader and Strong Performer categories. However, there are important Leaders in each of the three main categories: mobile current offering, mobile strategy, and mobile market presence (see Figure 3):

- **Box, IBM, and Yammer lead in mobile current offering scores.** Current offering scores are determined by how many smartphone and tablet platforms the product runs on and by scores for security, administration, and user reviews. These vendors have strong cross-platform support, in IBM’s case going back many years. IBM’s LotusLive Meetings excels also in security and desktop support. Content synchronization and distribution vendor Box gets high marks in Apple App Store reviews. Yammer’s scores are balanced across most current offering attributes.

- **Skype, Box, Yammer, and Cisco lead in mobile strategy scores.** Strategy is determined largely by the vendor’s strategy for cloud reach and the mobile app architecture (the balance between native apps and cloud services) as well as by the number of years with a mobile solution and the organizational commitment. Skype wins on architecture and years in market. Box wins on mobile and cloud architectures as well as organizational commitment. Cisco wins on cloud reach and mobile architecture. Yammer wins on mobile app architecture.

- **Skype, Cisco, and Google lead in mobile market presence scores.** Market presence is determined by the number of paying customers, paying users, and downloads. Skype’s global reach and longevity contribute to its market presence scores. Cisco’s scores are determined largely by the momentum of existing customers moving meetings to mobile. Google wins because of its installed base of paying customer licenses and downloads.

This evaluation of the mobile collaboration market is a starting point only. We encourage you to view detailed product evaluations and adapt the criteria weightings to fit their individual needs through the Forrester Wave Excel-based vendor comparison tool.
Figure 3 Forrester Wave™: Mobile Collaboration, Q3 ’11

Go online to download the Forrester Wave tool for more detailed product evaluations, feature comparisons, and customizable rankings.

Source: Forrester Research, Inc.
Figure 3 Forrester Wave™: Mobile Collaboration, Q3 ’11 (Cont.)

<table>
<thead>
<tr>
<th>VENDOR Profiles</th>
<th>CURRENT OFFERING</th>
<th>STRATEGY</th>
<th>MARKET PRESENCE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adobe</td>
<td>3.70</td>
<td>20%</td>
<td>3.00</td>
</tr>
<tr>
<td>AT&amp;T</td>
<td>3.00</td>
<td>30%</td>
<td>2.70</td>
</tr>
<tr>
<td>Box</td>
<td>4.15</td>
<td>15%</td>
<td>3.30</td>
</tr>
<tr>
<td>Cisco</td>
<td>3.65</td>
<td>50%</td>
<td>5.00</td>
</tr>
<tr>
<td>Citrix</td>
<td>2.55</td>
<td>20%</td>
<td>4.60</td>
</tr>
<tr>
<td>Dropbox</td>
<td>3.25</td>
<td>35%</td>
<td>4.00</td>
</tr>
<tr>
<td>Evernote</td>
<td>3.40</td>
<td>20%</td>
<td>2.00</td>
</tr>
<tr>
<td>Google</td>
<td>3.75</td>
<td>25%</td>
<td>3.00</td>
</tr>
<tr>
<td>IBM</td>
<td>3.65</td>
<td>5%</td>
<td>3.70</td>
</tr>
<tr>
<td>Salesforce</td>
<td>3.00</td>
<td>40%</td>
<td>5.00</td>
</tr>
<tr>
<td>Skype</td>
<td>3.40</td>
<td>30%</td>
<td>5.00</td>
</tr>
<tr>
<td>SugarSync</td>
<td>3.00</td>
<td>30%</td>
<td>4.00</td>
</tr>
<tr>
<td>Yammer</td>
<td>3.65</td>
<td>5%</td>
<td>5.00</td>
</tr>
</tbody>
</table>

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

VENDOR PROFILES

Each vendor has a unique approach to mobility that is shaped by the collaboration problem they are solving — document-based collaboration and webconferencing are entirely different scenarios — and by their history, legacy, and belief in mobility. For example, Microsoft is not present in this Forrester Wave, although it is a critical collaboration vendor. Once Microsoft follows through on its promise of delivering the Lync and SharePoint Workspace clients on multiple mobile platforms, it will also be an important mobile collaboration vendor. But for now, these 13 vendors have the features that your mobile employees need.

Leaders Bring Strong Mobile Capabilities

- **Adobe Connect brings Flash and experience to its webconferencing solution.** Adobe has solved the challenges of iPhones and iPads by porting its Flash-based webconferencing application. The other platforms are targeted through Flash support. The vendor focuses on usability and user experience with a careful design of its product features for different screen sizes and form factors.
• **Box is a document-based collaboration startup with big aspirations.** This Palo Alto-based startup is focused on getting your enterprise content securely out to mobile devices via its cloud service. Box has raised $70 million in venture funding and is using that money to add enterprise features such as policy-based administration, security features, and SharePoint and Documentum connectors.

• **Cisco WebEx continues its mobile app Internet dominance.** Cisco WebEx already has more than 1 million mobile attendees and more than 15 million mobile meeting minutes every month. This will only grow as the number of tablets and smartphones increases. The vendor is well suited to a cloud-based, multidevice world with its global network and native mobile apps on iPhone, iPad, Android (including its Cius tablet), and RIM BlackBerry smartphones.

• **IBM LotusLive Meetings has good multiplatform, multidevice support.** IBM has almost doubled the size of its mobile device development team in the last year to port this webconferencing app to iPad, iPhone, Android, and soon RIM’s products. Coupled with IBM’s cloud delivery model and enterprise-grade security and administration, this product has the mobile support that business customers need. However, IBM has fewer mobile webconferencing customers than Adobe, Cisco, or Citrix.

• **Salesforce brings Chatter to mobile devices along with its other modules.** Salesforce.com has built mobile apps for its CRM solution for years, and its Chatter collaboration tool is no exception. What’s notable about salesforce.com, besides its cloud architecture and extensive mobile device support, is its focus on building hybrid apps that get the most functionality possible out of HTML5 browsers extended with client-side JavaScript libraries.

• **Skype is a surprisingly big force in mobile collaboration.** Skype, which is now awaiting approval to be purchased by Microsoft, counts more than 170 million active monthly users. Features include audio and videoconferencing, inbound and outbound dialing to regular phones, presence and chat, file sharing, and Wi-Fi access services. The company has had tens of millions of downloads on six different mobile operating systems, including iOS, Android, and RIM. Forrester estimates that at least 39% of Skype users use it for business.

• **SugarSync offers document-based collaboration services with an eye on service providers.** This startup has raised $26 million to offer cloud-based file synchronization and collaboration. SugarSync has Korea Telecom as a customer reselling its solution to 21 million customers, and it has its eye on other service providers in the US and Europe. Like other mobile collaboration startups, the vendor uses a freemium model with five gigabytes for free and a storage-based pricing model after that. Its business offering includes administration features in addition to security.

• **Yammer is focused on a consistent user experience across all devices.** Yammer’s business social offering already counts 100,000 business customers, with 82% of the Fortune 500.
Although the vendor has a freemium model it does have an enterprise focus, with SharePoint web parts, OAuth-based authentication, and data and wireline encryption. Yammer has a “mobile first” strategy and is the first vendor to describe a development team building interaction APIs that deliver a consistent user experience across all devices.

**Strong Performers Embrace The App Internet**

- **AT&T Connect continues to focus on making its webconferencing solution more mobile.** AT&T, as a service provider, is building services that run well in its global networks and data centers. Its Connect product scored well in our last webconferencing Forrester Wave, and the vendor continues to expand the product to tablets and smartphones. The big benefits include a cloud delivery model and global reach.

- **Citrix has extended GoToMeeting to tablets and soon to smartphones.** Citrix continues its successful path of highly usable and reasonably priced webconferencing solution. Citrix launched GoToMeeting on iPad in April 2010, and it now has ported the offering to iPhones and the Droid3 Android phone. The vendor plans to support more Android smartphones and tablets later this year.

- **Dropbox serves your employees mobile document needs with or without your support.** This 50-person startup has had more than 5 million iOS downloads, 1 million Android downloads, and 1 million BlackBerry downloads since its 2009 launch. Dropbox users include those with email addresses at 87% of Fortune 100 firms — and probably your firm too. The vendor reports that 200 million files a day are uploaded to its servers. Files are encrypted on Amazon’s S3 cloud storage, and data transfers use SSL. While the service lacks features like legal hold and directory synchronization, it has an active marketplace where more than 200 other apps are extending or harnessing Dropbox features.

- **Evernote brings a mobile app Internet architecture to note-taking.** In the words of CEO Phil Liben, “Evernote is a way to remember everything you have to remember.” This note-taking application stores notes in the cloud and makes them available with a native app on every device. Evernote is a startup with $43 million in funding and 9 million users. Although this vendor has not yet built enterprise security features, it is another document-based collaboration vendor that likely includes your employees among its customers.

- **Google pushes mobile web but has acknowledged the need for mobile apps.** Google Apps for Business is a cloud-based collaboration solution with customers like GSA, Genentech, and the city of Los Angeles. Google long ago mastered the mobile app Internet architecture, but its “100% web” strategy makes it a reluctant mobile app builder. However, it has built a Google Docs app for Android, and Forrester believes it will build more mobile collaboration apps over time.
SUPPLEMENTAL MATERIAL

Online Resource

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

Data Sources Used In This Forrester Wave

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

- **Vendor surveys.** Forrester surveyed vendors on their capabilities as they relate to the evaluation criteria. We also conducted vendor interviews to gather details of vendor qualifications.

- **Apple App Store customer reviews.** We gathered the customer reviews and the number of reviews for the most recent version and for all versions of the mobile app. We gathered this data for every mobile app on the same day, May 14, 2011.

The Forrester Wave Methodology

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

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

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

1 Broadband connections, mobile devices, and collaboration tools make employees productive from any location. Your employees know this already: Forrester’s survey of more than 5,000 information workers in five countries reveals that half of the information workforce works online from home, and one in five does on the go. They also live online using the Internet for personal purposes at work (especially your senior staff). But surprise! Employees give that time back by working online the same number of hours at home, where Facebook and YouTube and email and web meetings blend into a happy work/life balance. As a content and collaboration (C&C) professional, your conclusion should be that it’s time to champion the cause of your company’s work anywhere future and carry the technology banner to achieve it. See the March 17, 2011, “The Internet Crushes The Work/Life Boundary” report.

2 The explosion of app innovation that started on the iPhone and then spread to Android devices and tablets will continue to drive tech industry innovation and have far-reaching pricing and go-to-market implications for software and services providers. The development of this mobile “app Internet” with hybrid local and cloud-supported applications will foster huge levels of innovation and open up new services opportunities around the creation and management of these B2C, B2B, and B2E apps. The mobile app Internet will also change the way software is priced and designed. See the February 28, 2011, “Mobile App Internet Recasts The Software And Services Landscape” report.

3 The days when a Windows application and a server cluster in the data center could handle your collaboration needs are over. An increasingly mobile and remote workforce with experiences forged by Angry Birds and Google Maps has killed it. Mobile employees’ expectation of a great user experience on any device can only be met with collaboration solutions architected with native apps and cloud delivery, an architecture Forrester calls the mobile app Internet. And that means content and collaboration professionals need a new approach and often a new set of suppliers that can deliver real-time and team-based collaboration apps on any mobile device. See the July 13, 2011, “Mobilize Your Collaboration Strategy” report.

4 Some vendors pointed out that consumer products like Skype or Dropbox will get more reviews than enterprise products like WebEx or salesforce.com Chatter. But in this world of consumer-led technology innovation, Forrester believes that apps that employees bring in to solve business problems are an important source of technology solutions. So the individual reviews are a valid input into any assessment.

5 The statistics in this section are drawn from a survey of 5,519 information workers in the US, Canada, UK, France, and Germany in our Forrsights Workforce Employee Survey, Q1 2011.