

Foreword
 "The language of the web implies a physical space. We visit sites, sites have information architects and there is a lot of buzz currently about spaces so it would seem sensible to have a map to help us make sense of our new environment. FirstPartner's 2007 Market Map: Enterprise 2.0 does just this for the emerging use of social media tools in the workplace. For those not there from the start it can be bewildering fit together and to decide which are worth paying attention to and which you should ignore. Although clearly a snapshot in time of a rapidly changing environment the Market Map is a great place to start if you want to explore this new world. It can help you quickly find your way around and focus conversations in your business about where you are and where you want to get to."
 Euan Semple, Independent Web 2.0 Consultant, euansemple.com

Introduction
 Welcome to the FirstPartner Enterprise 2.0 Market Map. Enterprise 2.0 is a term which many struggle to define and understand. We have therefore developed this market map to articulate the different attributes of this emerging sector. In 5 years from now, we firmly believe many of these tools and elements captured will have been consolidated by the larger enterprise software vendors.

What is Enterprise 2.0
 Enterprise 2.0 brings together 5 elements of new technology:

1. Web access – Enterprise 2.0 applications are available through a traditional web browser. AJAX is being used to power many Web 2.0 and Enterprise 2.0 applications. AJAX allows web applications to look like and behave like traditional business applications that would have historically been installed on the desktop.
2. Collaboration – Increased bandwidth means that greater collaboration between workers is possible.
3. Information flow – The web is creating a vortex of information for Enterprises to sift through and extract business information. New tools are helping enterprises to capture and manage this information.
4. People networks – Taken from consumer social networks, business networks within the organisation and within industries have the potential to flourish within the Enterprise 2.0 environment.
5. Access tools – Traditional internet search is being targeted as not relevant and focused enough for business use. Vertical search, tagging, clipping and bookmarking technologies are seeking to improve relevancy and speed of access to business information.

Structure of the Map
 The map consists of the following value chain elements:

Customers/Users – The end of the value-chain for Enterprise 2.0 technologies. They are the ultimate arbiter whether many of these technologies are adopted or rejected.

User tools – This is the segment of greatest innovation in the Enterprise 2.0 space. A wide range of new technologies are targeting business users. From vertical search, gadgets, tagging to collaboration and business networks. Broadly these technologies either seek to connect users with business generated content or web content (free or subscription based).

Content generation – These are both business authoring tools (wikis, blogs) and new sources of information feeds. Feeds in particular provide a new route for accessing external content.

Enterprise software – Enterprise software vendors have been slow to catch on to the Enterprise 2.0 range of new technologies. We believe many of these vendors will ultimately develop their own modules to their existing platforms or will cherry pick the best start-ups in the space.

Enablers – Enterprise 2.0 has a number of vocal supporters helping to raise business awareness and form a consensus for this emerging segment of software.

Key Trends
 The Enterprise 2.0 space is growing rapidly. Below are some of our key predictions for the market during the remainder of 2007 and beyond:

Trials and pilot phase – Many of these technologies will undergo trials and pilots with customers over the next 12 months. At present few Enterprise 2.0 vendors have large subscription installed customer bases.

Advertising business model for the SME market – The Internet model of free service in return for advertising is being tested in the business market. We believe this will work in the SOHO, SME market, but for the Enterprise segment a subscription model will be required. This could see a bundling of a range of Enterprise 2.0 technologies in order to arrive at an attractive subscription model.

Content Management Software (CMS) Vendors enter – Leading vendors have undergone major consolidation since the first wave of website deployments back in year 2000. Those customers are now looking to upgrade the existing websites and many of the Enterprise 2.0 technologies can form additional modules to the CMS suite.

Blogging will struggle in the business environment – Business etiquette and organisational structures mean authoring personal, opinion based content (the strength of blogs is providing a voice to the individual consumer) will not be possible. For this reason we believe Wikis and Tagging products are likely to be more usable within a business context.

FirstPartner
 FirstPartner is a fast growing strategic marketing and research agency. No other agency has the strength of understanding technology and its impact on changing customer behaviour, combined with marketing know-how.

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Customers/
Users

User Tools

Content Generation

Enterprise Software

Enablers

Prosumers 1) Access information anywhere 2) Personalise & customise applications and tools 3) Upload content and share with others	SOHOs 1) Cost effective compared to traditional applications 2) Access information anywhere such as bookmarks & contacts 3) Ability to promote services and network with others	SMEs 1) Seeking security and interoperability with existing networks 2) Cost effective compared to traditional applications 3) Extends and integrates easily with existing applications	Enterprises 1) Seeking security and interoperability with existing networks 2) Provides transparency, simplicity and information sharing 3) Integration of various technologies such as VoIP & CRM
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Access & Presentation					Discovery	People Networks		Communication Platforms		
Video AltraSoft Cisco Veodia Verisign YouTube Reach: 9.4995% Users: 30.5m	Web 2.0 Portals Autonomy iGoogle iPoint Portal Eskobo Favoer Goowy Linkedfeed Live My Yahoo! Netvibes Pageflakes Webwag Reach: 0.1865% Users: 5m	RSS Attensa Feedeeye FeedForAll Gritwire Jet Brains (Omea Reader) KnowNow NewsGator Newshutch Rojo trawlr Reach: 0.0181% Users: 1m	Gadgets Desk Accessories Google Desktop Microsoft Gadgets Nokia Openwave Mida Spring Widgets Yahoo Widget Engine Reach: 25.7% Users: 20.7m (pm)	Web Mashup ActiveGrid Amazon AOL BBC Denodo Technologies eBay Google JackBe NewsGator Salesforce Teqlo Windows Live Yahoo Reach: 1.59% Users: 18.4m (pm)	Bookmarking/Clip Tagsearch Clipmarks Connect Beam Connotea del.icio.us tagsearch technologies	Horizontal Ecademy Famundo Haystack (Cerado) Ryze Spoke Tabber Visible Path XING Reach: 0.248% Users: 10m	Industry Specific Downtown Women's Club Law Society my eOffice sermo	Collaboration CreativePro Office Google Docs Jabber Near-Time NetAge Parlando MessagePal NetAge Pink Notes Reuters Skype Siemens Sprint Truphone Userplane Reach: 0.00345% Users: 0.3m	VoIP/IM Services Applicable (IBM Lotus) Effusia Interactive Networks Parlando MessagePal NetAge Pink Notes Reuters Skype Siemens Sprint Truphone Userplane Reach: 0.2925% Users: 1.7-50m	Peer 2 Peer (p2p) Bit Torrent Direct Connect GUNet Usenet Windoes Peer-to-Peer Reach: 0.0596% Users: 12m

Web Generated Content	Business Generated Content
Blog Syndication digg Lijit lisit Technorati Topix YellowBrix	Wikis Atlassian (Confluence) Clearspace Curverider CustomerVision eTouch Media Wiki PBwiki Socialtext Traction Software TWiki
Proprietary Feeds Factiva Paid subscriptions to business information. For example Stock pricing, data intelligence and news services.	Blogs 21Publish Attensa Blogger Cerado Clearspace iUpload tumblr Twitter Typepad Wordpress
My Pages Facebook LinkedIn MySpace Wild Apricot	Document Man. Beengo Blinksale docHarbor Famundo Microsoft (Groove/Sharepoint) Mondeca PebblePAD Salesforce.com (koral)

Blogsphere	Financial	PR	Publishers	Traditional Content Management Platforms	CRM	ERP
	Bloomberg FT Reuters Thomson	Newswire PR Web Direct	BBC Brandweek CNN Incisive Media Media Week	Enterprise Interwoven Open Text Oracle (Stellent) Vignette (ECM) Xerox (DocuShare)	Library Alexandria DDElibra EOS L4U SirisDynix Voyager	absoluteBUSY entellium Maximizer NetSuite salesforce.com Sales Junction SugarCRM vTiger
				Jaду RedDot		1time Basecamp Cashboard devshop Intervals JIRA NetSuite ProWorkflow.com

Public Content	Private Content
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Information Providers

Enterprise 2.0 Blogs Andrew McAfee Michael Koch Social Media Collective Techcrunch	Enterprise Events enterprise2conf.com Enterprise 2.0 Rave XTech	Enterprise Pub. enterpriseweb2.com
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Legend

- Tier 1
- Tier 2
- Tier 3
- Revenue Opportunity
- Map available
- Watch List
- Under Construction