Мировой и российский рынки

People as the Platform

Январь 2011

Назначение этой презентации - предоставить:

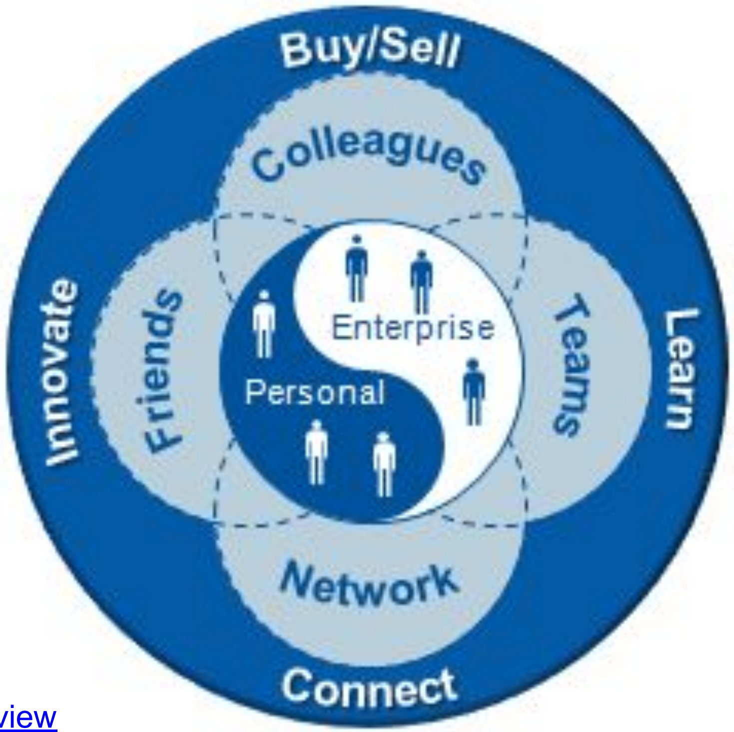
- Описание рынка People as the Platform
- Расчет рынка People as the Platform с позиции Supply Side
- Расчет рынка People as the Platform с позиции Demand Side
- Прогноз динамики рынка People as the Platform

Описание рынка People as the Platform

Supply Side всех сегментов рынка социального софта весьма запутан

- CIOs and IT and business leaders request guidance on how to apply social approaches to their business. E-business created disruption a decade ago. Social business will have an even more significant impact

- Markets are confusing. New vendors and technologies continue to emerge, while established vendors in other adjacent markets are adding social functions

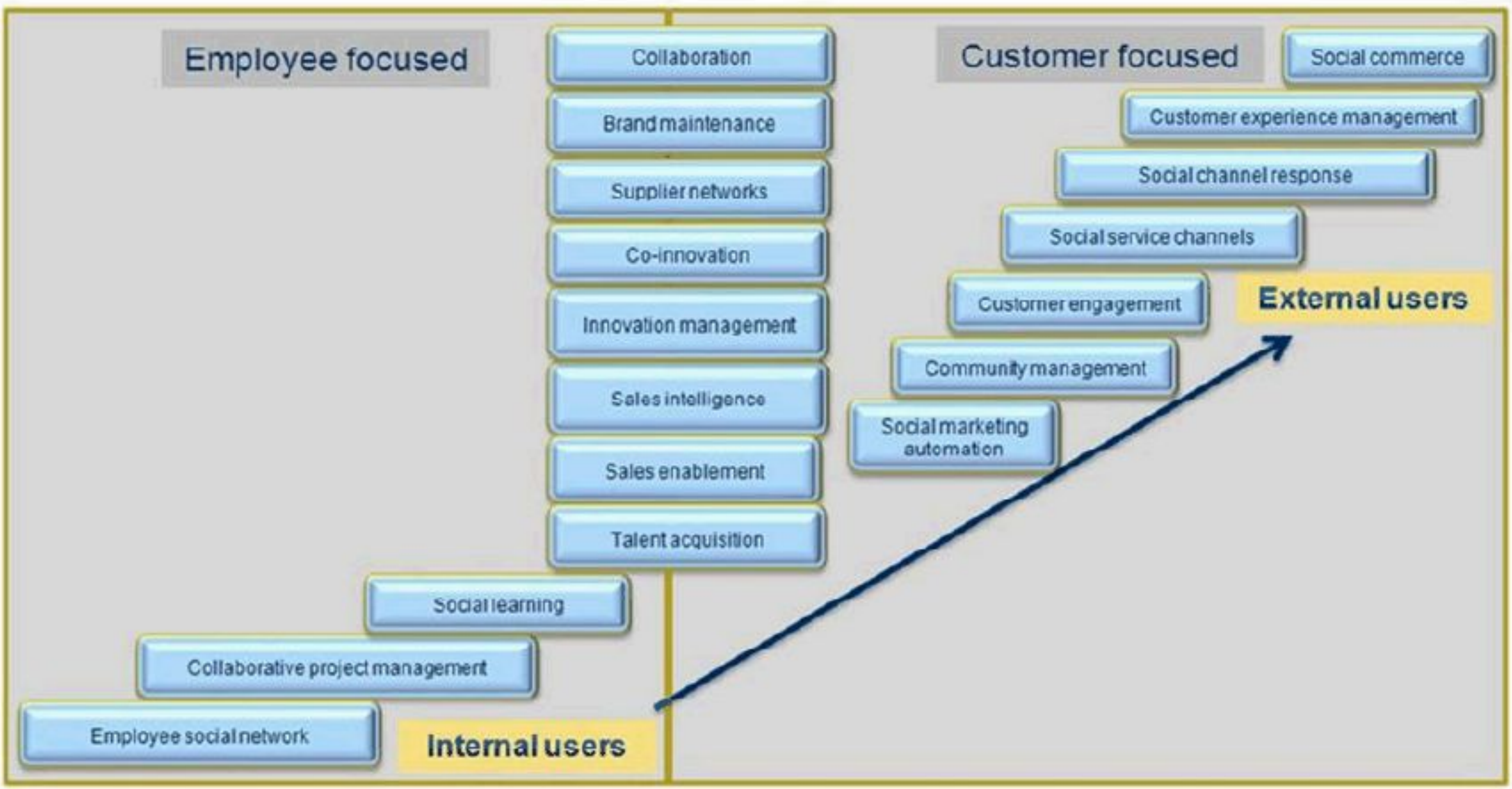


Source: Gartner, 2011, [Business Gets Social Innovation Key Initiative Overview]

Единственный способ корректно посчитать рынок с Supply Side - сегментировать его по релевантным классам/сегментам приложений

Релевантных сегментов приложений очень много – они есть для большинства бизнес-процессов

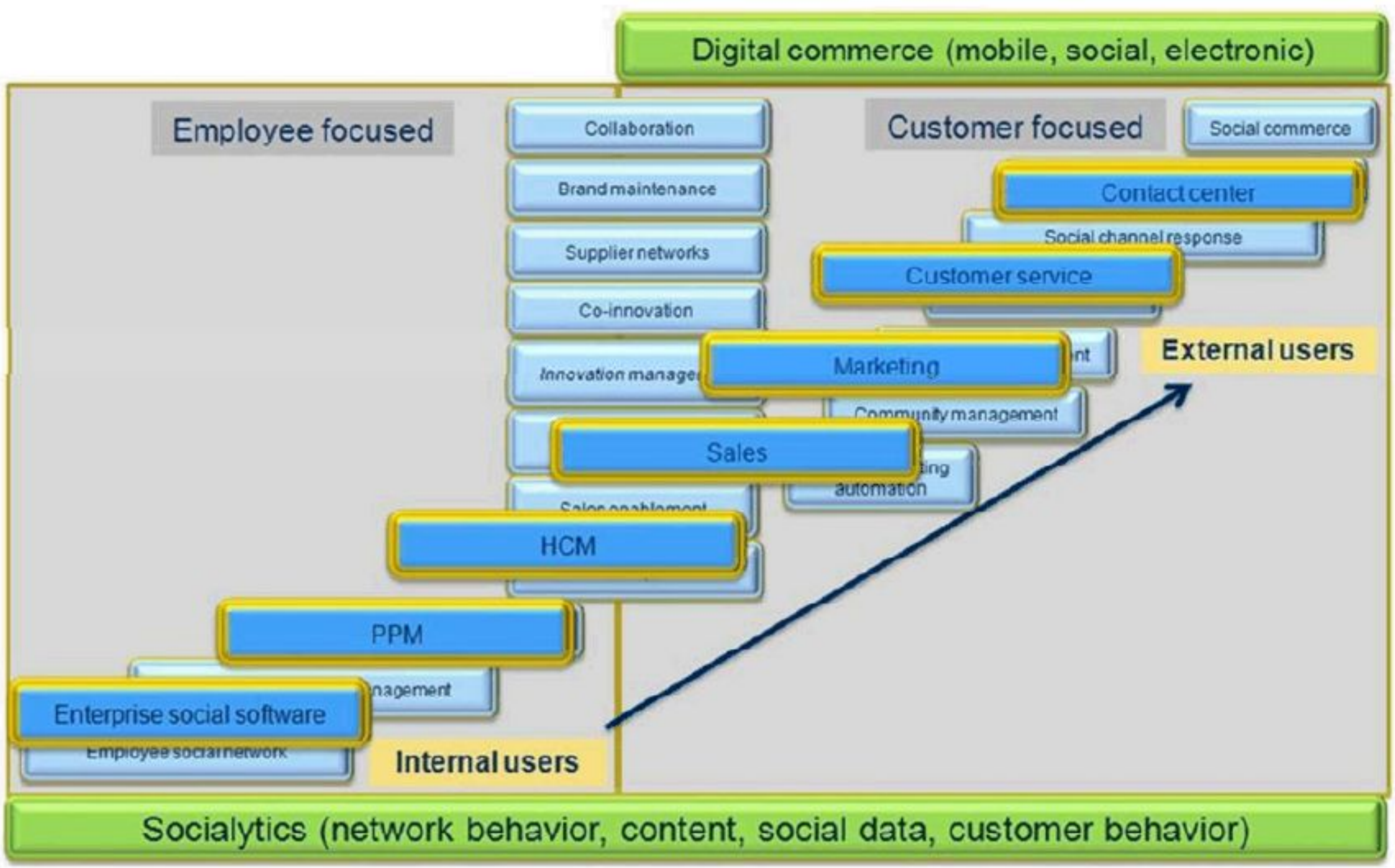
Social Business Impact (Business Process)



Source: IDC, 2011 IDC's Social Business Taxonomy

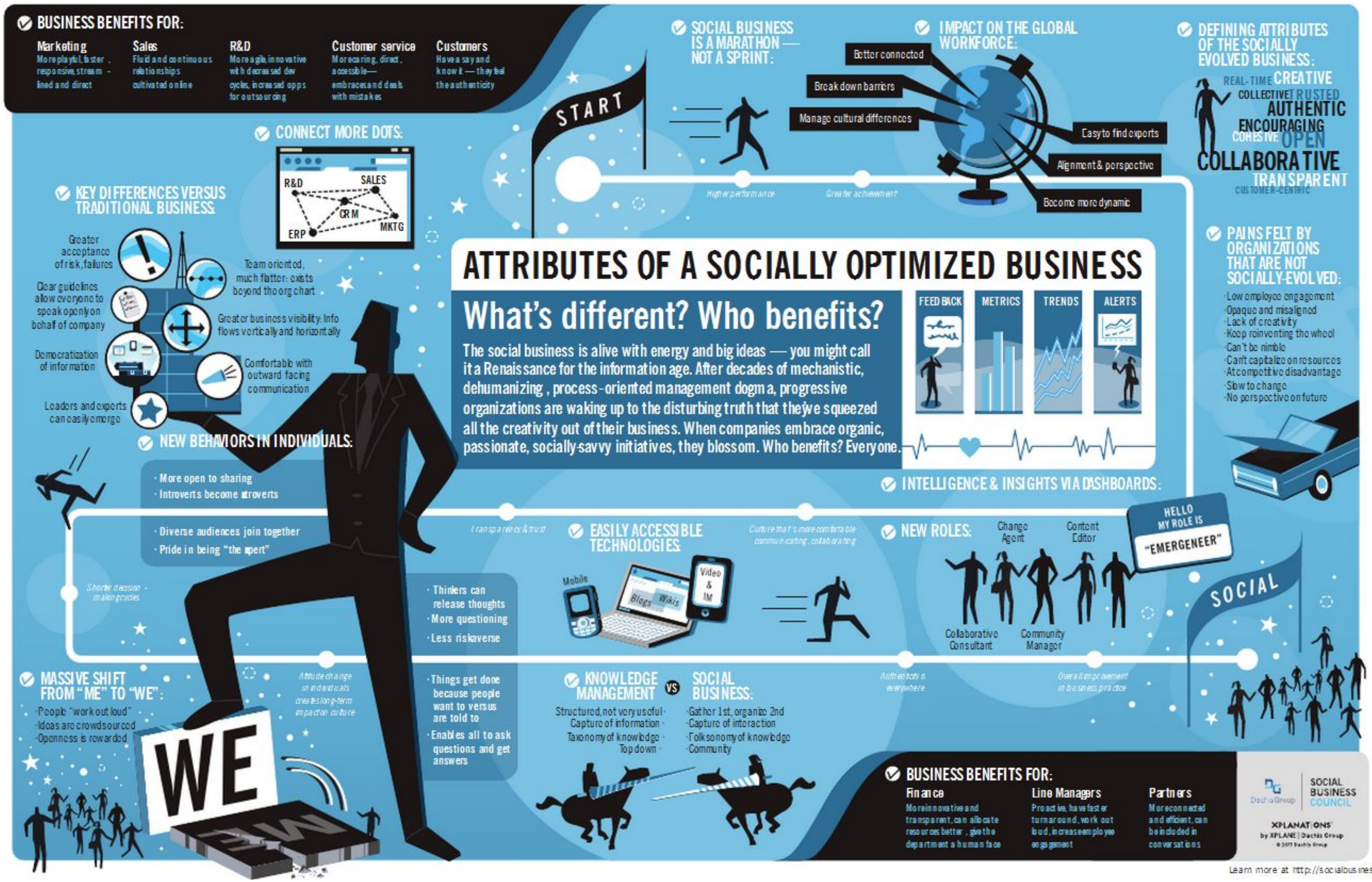
Т.е. социальные технологии затрагивают все звенья бизнеса

Social Business Impact (Process and Technology)

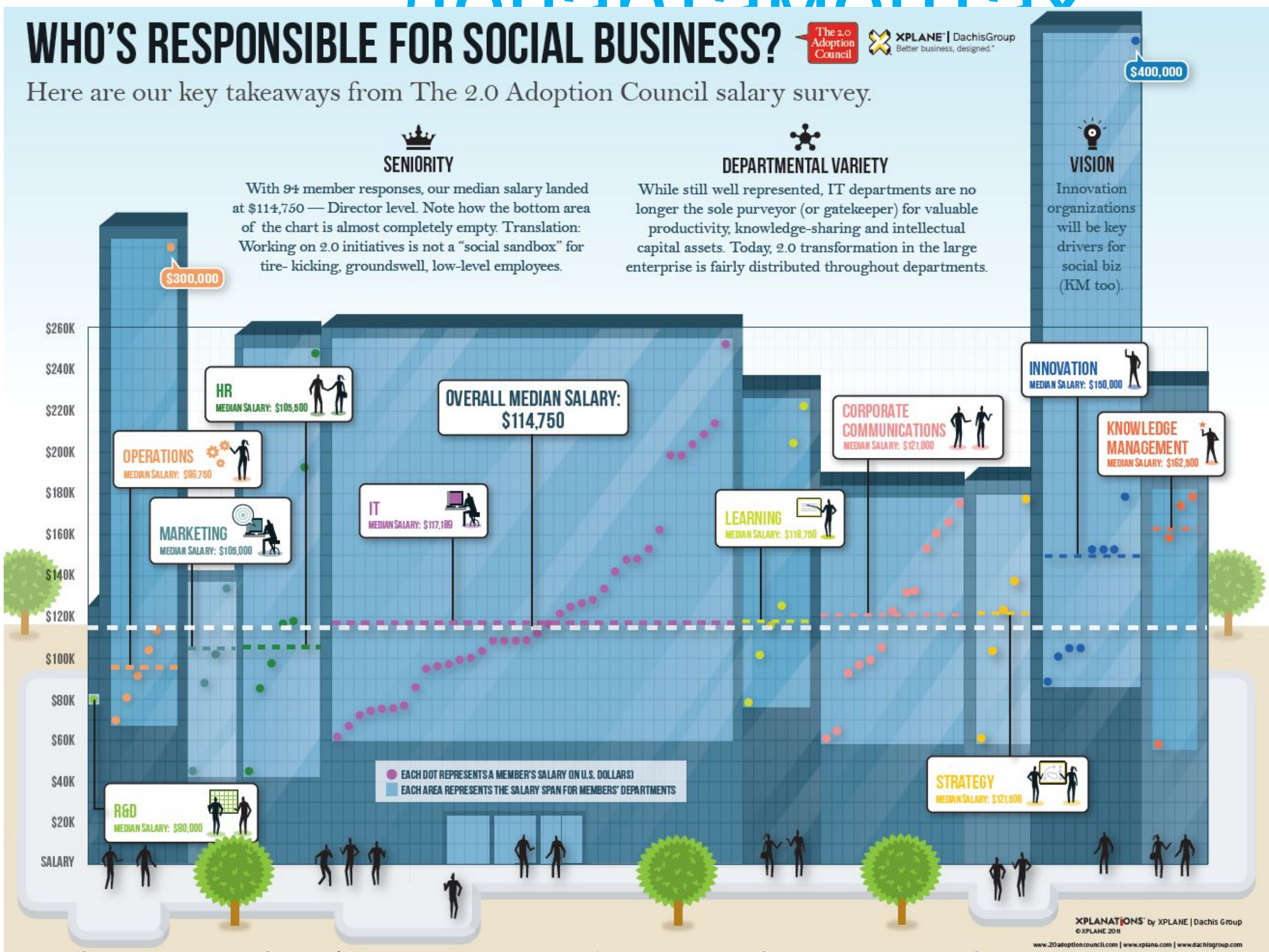


Source: IDC, 2011 [IDC's Social Business Taxonomy]

Это подтверждается наличием бенефитов практически для всех звеньев бизнеса

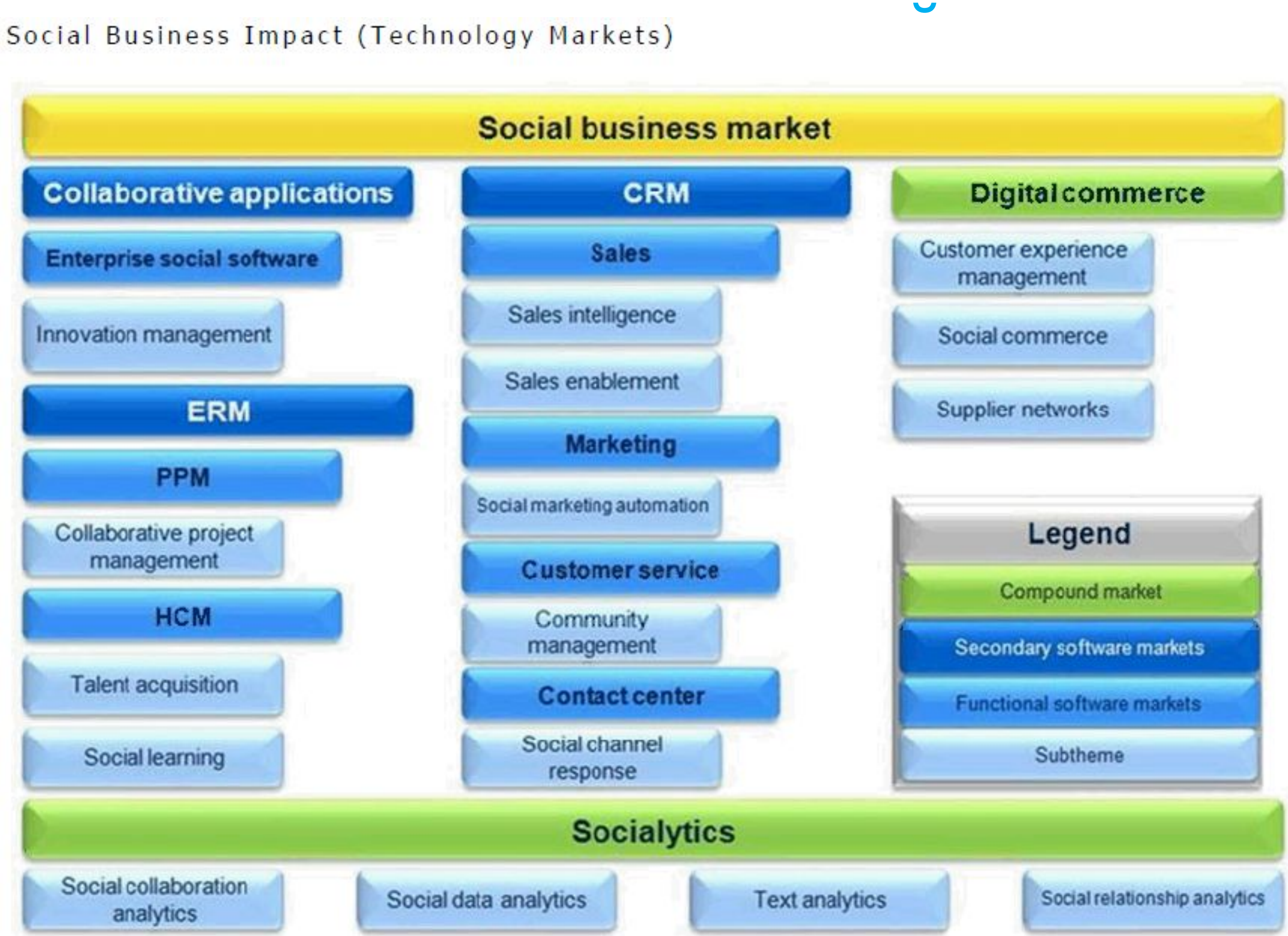


… из чего следует и наличие ответственных за Social Business практически во всех департаментах



Source: Dachis Group | XPLANE, 2011, [Who's responsible for social business?]

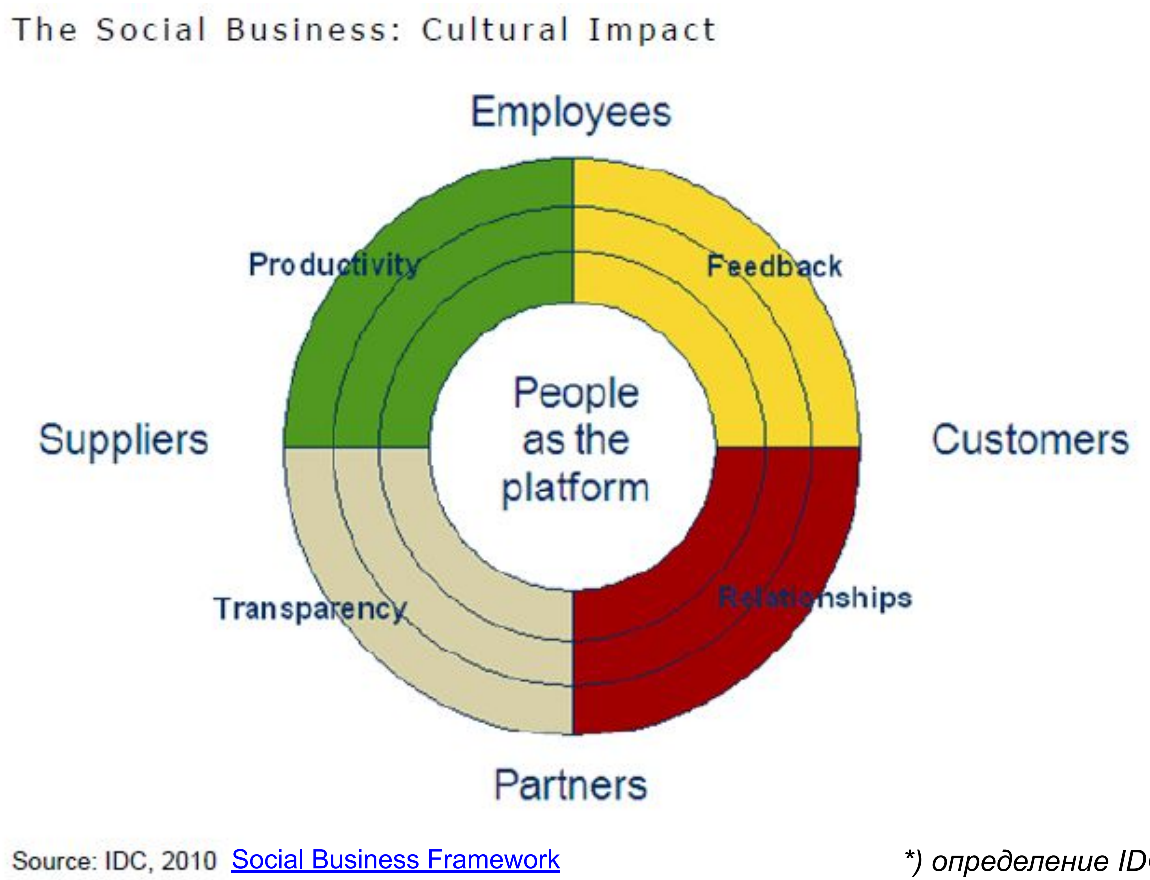
В итоге получается примерно такой набор релевантных классов



Source: IDC, 2011 [IDC's Social Business Taxonomy]

Пересечение всех релевантных классов приложений можно назвать «People as the Platform» *)

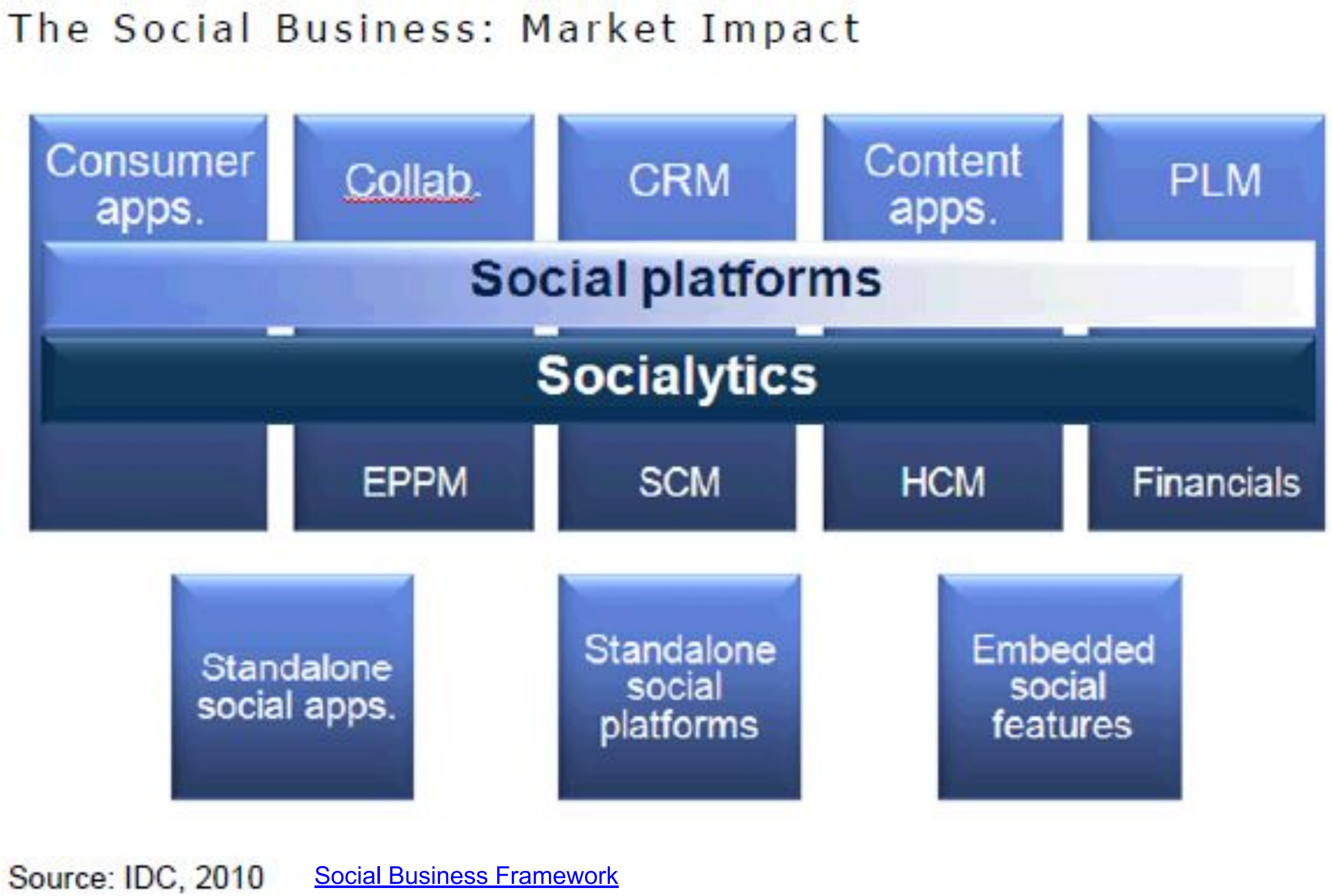
The social business will have an effect on a variety of IDC markets because the implications for its usage can be broadly applied as shown



[Social Business Framework]

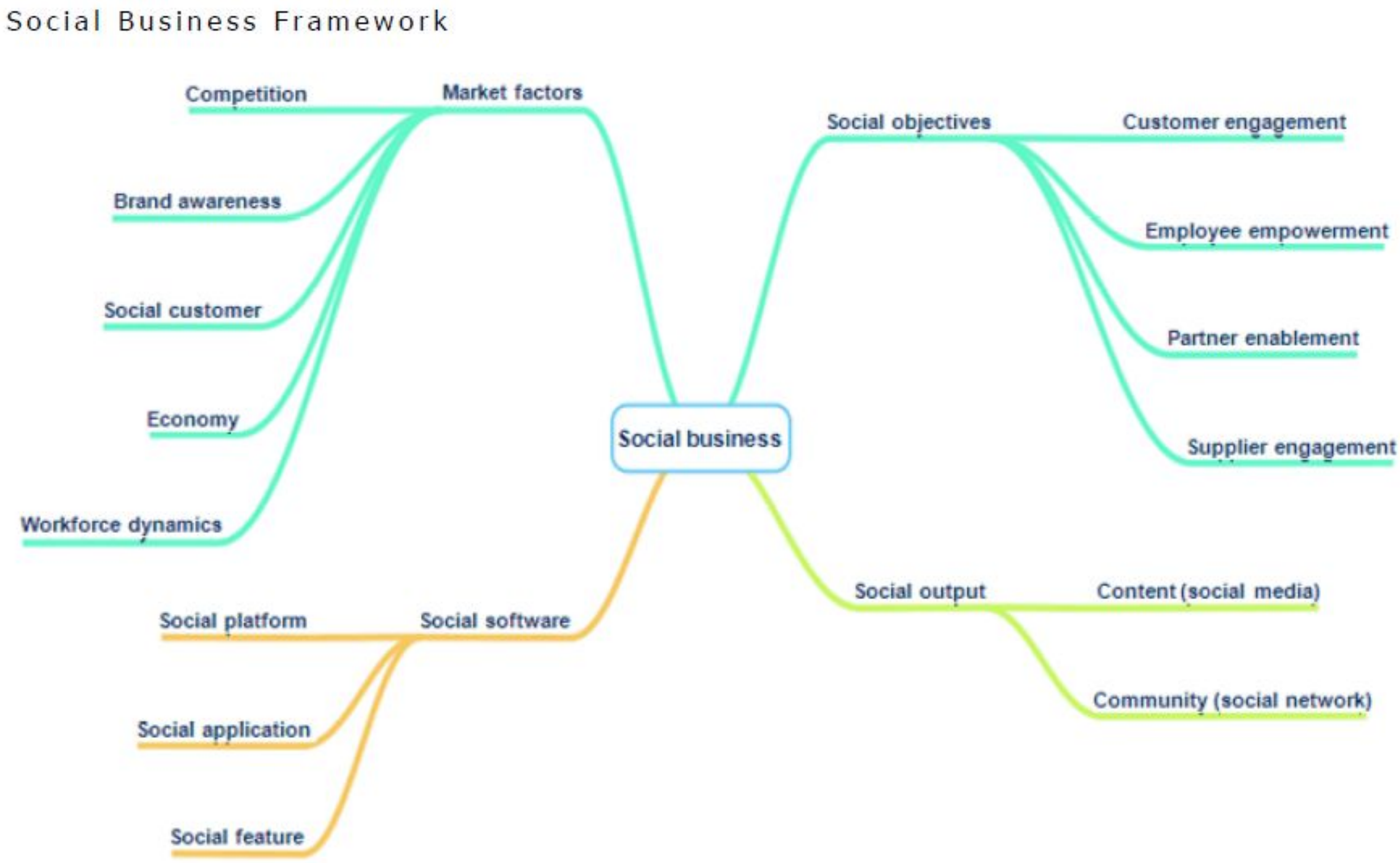
*) определение IDC

Получается примерно такой композитный рынок приложений «People as the Platform»



[Social Business Framework]

Возможный вариант фреймворка для композитного рынка «People as the Platform»



Source: IDC, 2010 [Social Business Framework]

Рассмотрим лишь основные сегменты композитного рынка «People as the Platform»

1. Innovation Management
2. Social CRM
3. Externally Facing Social Software
4. Social Software in the Workplace
5. Corporate Learning Systems
6. E-Recruitment Software
7. Collaborative Decision Making

N.B.1 Названия сегментов – условные, поскольку они разные у разных аналитиков рынка: IDC, Gartner, Forrester …

N.B.2 Платформы ряда вендоров, в силу своего функционала, относятся более чем к одному из сегментов

1. Сегмент Innovation Management

Business Impact

- open innovation efforts by stimulating and capturing creative ideas from outside your own organization
- dramatically increase the available human resources
- extend access to key capabilities and change their associated cost structure

Innovation Management Vendors:

- BrainBank
- Brightidea
- Elguji
- Hype Softwaretechnik
- Imaginatik
- Induct Software
- InnoCentive
- Inova
- Kindling
- MindMatters
- Spigit

Social Software Vendors:

- Jive
- NewsGator
- salesforce.com

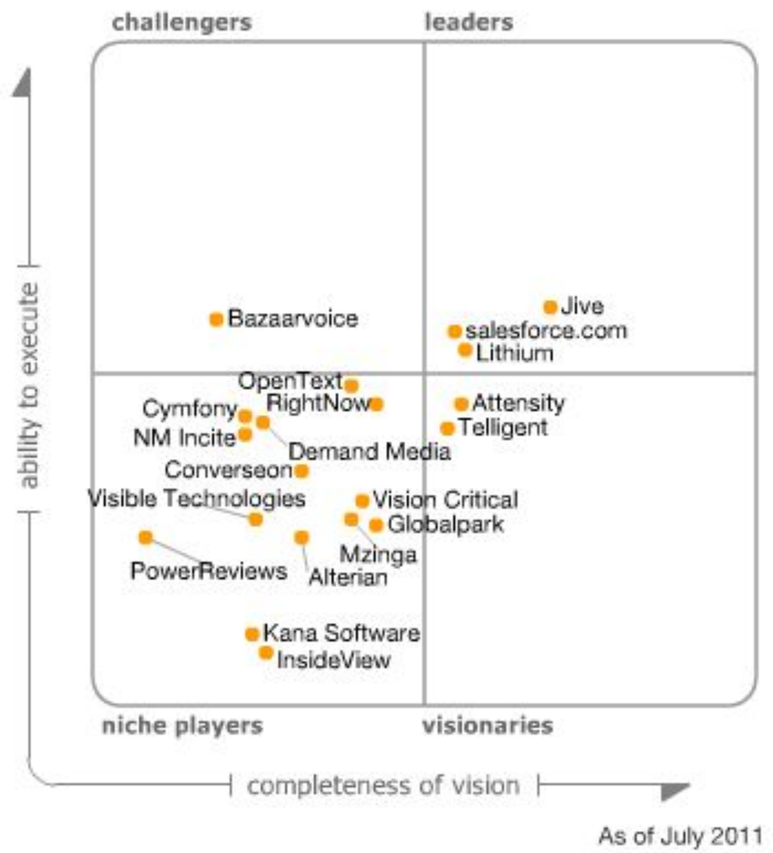
Product Life Cycle Management:

- Sopheon

Source: Gartner, 2011, [Who's Who In Innovation Management Technology]

2. Сегмент Social CRM

- Spending by buyers on social software for marketing, customer service and sales increased by 40% in 2010, but social CRM remains less than 5% of the total CRM application market. Gartner expects the social CRM market to reach over $1 billion in revenue by year-end 2012, up from approximately $625 million in 2010
- More than 100 vendors have social CRM offerings. Most are not profitable and generate annual revenue of less than $1 million. Consumer use accounts for over 90% of spending on social CRM, but spending on business-to-business (B2B) use is growing faster and will account for 30% of total social CRM spending by 2015

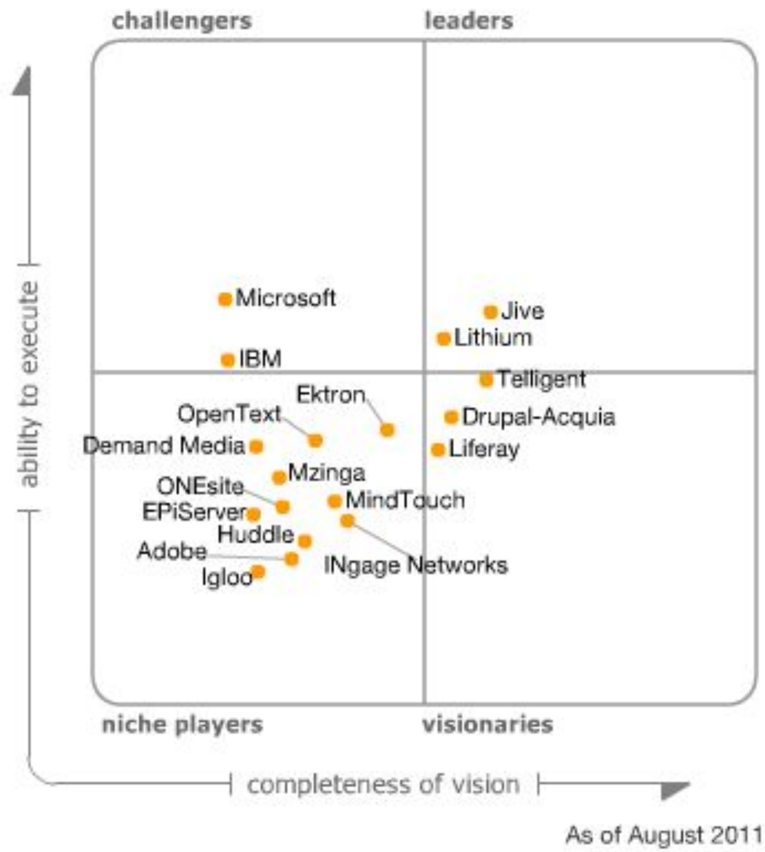


Source: Gartner, 2011, Magic Quadrant for Social CRM

3. Сегмент Externally Facing Social Software

Buyers of EFSS include:

- Business executives (such as product managers, channel managers, product developers, strategists and business architects).
- Personnel in other internal support organizations (such as program managers and business architects) involved in specific strategic initiatives (such as innovation, social responsibility and special projects).
- IT professionals working in the IT organization, or in various other support or business functions.

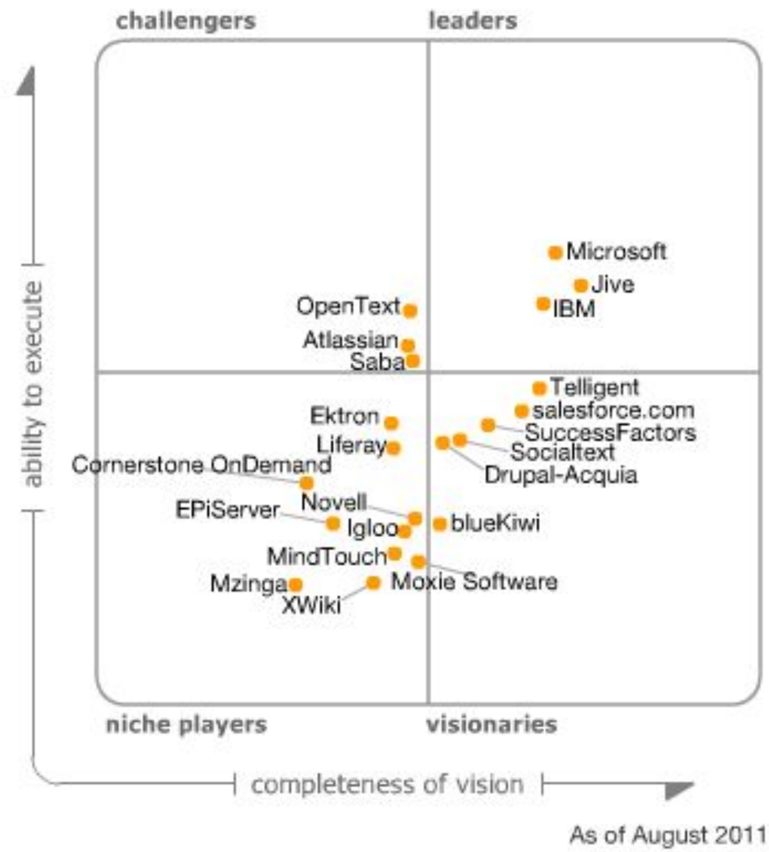


Source: Gartner, 2011, [Magic Quadrant for Externally Facing Social Software]

4. Сегмент Social Software in the Workplace

Magic Quadrant includes three kinds of vendors:

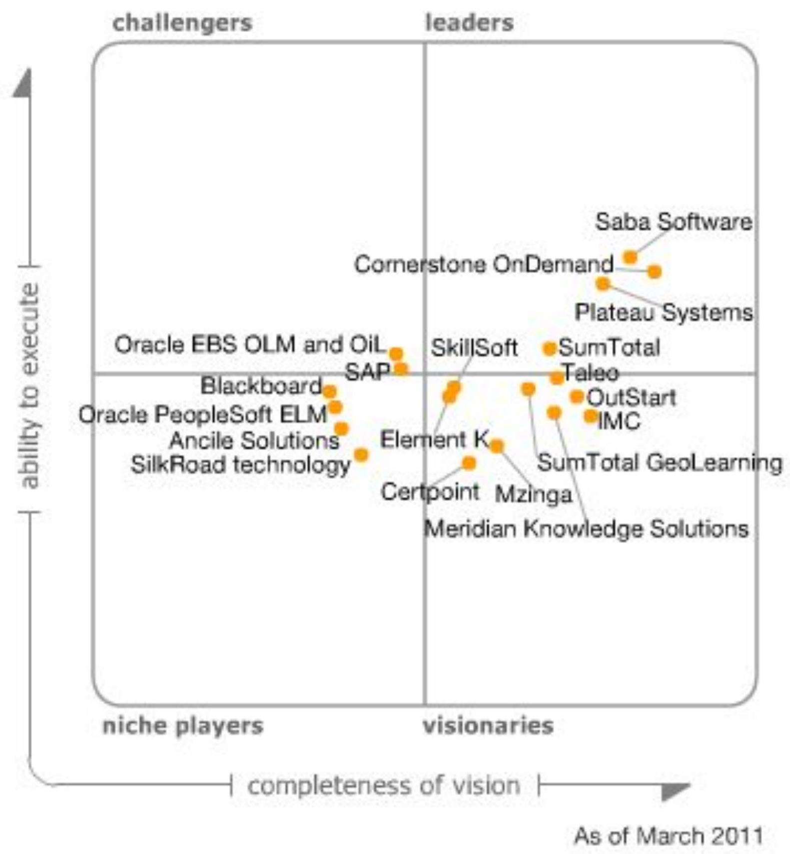
- **Social application vendors** that offer primarily self-contained social software functions
- **Enterprise platform vendors** with a broad, deep presence across the enterprise, particularly with portals, content, application development and deployment, workflow, search and other capabilities
- **Business application vendors,** especially those already supporting horizontal "people processes," such as performance management and learning



Source: Gartner, 2011, [Magic Quadrant for Social Software in the Workplace]()

5. Сегмент Corporate Learning Systems

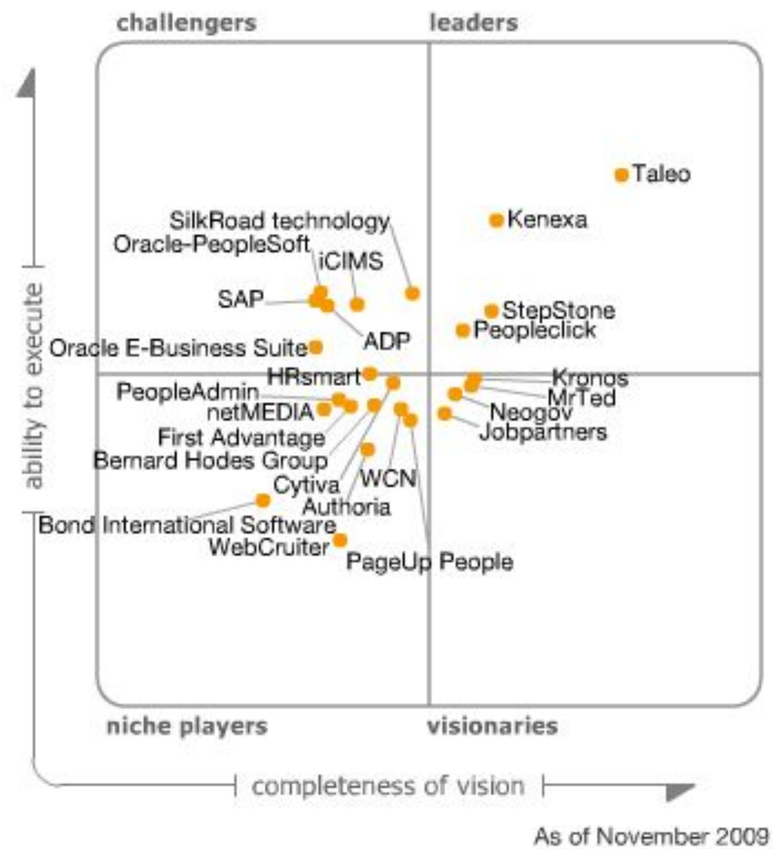
- In 2010, the majority of vendors continued to invest and broaden their social software offerings, such as social profiles, expertise location, wikis, blogs, discussion forums, tagging and ratings
- 34% said they planned to implement wikis, blogs and other collaboration tools from their CLS vendor within the next two years, while 11% stated that they have already implemented these tools. In addition, 25% of the respondents stated they plan to invest in social profiles from their CLS vendor before the end of 2012, with 6% already using the functionality



Source: Gartner, 2011, [Magic Quadrant for Corporate Learning Systems]

6. Сегмент E-Recruitment Software

- HR leaders must look beyond formalized, internal processes and deploy techniques more commonly applied in marketing if they are to attract new employees from the collective and retain personnel they already employ
- In leading organizations, recruitment processes already exploit social software and the collective, and there are other HR processes that can benefit from focusing on the collective
- 22% of respondents said that they were using social-software functionality from their e-recruiting vendor



Source: Gartner, 2011, Magic Quadrant for E-Recruitment Software

7. Сегмент Collaborative Decision Making

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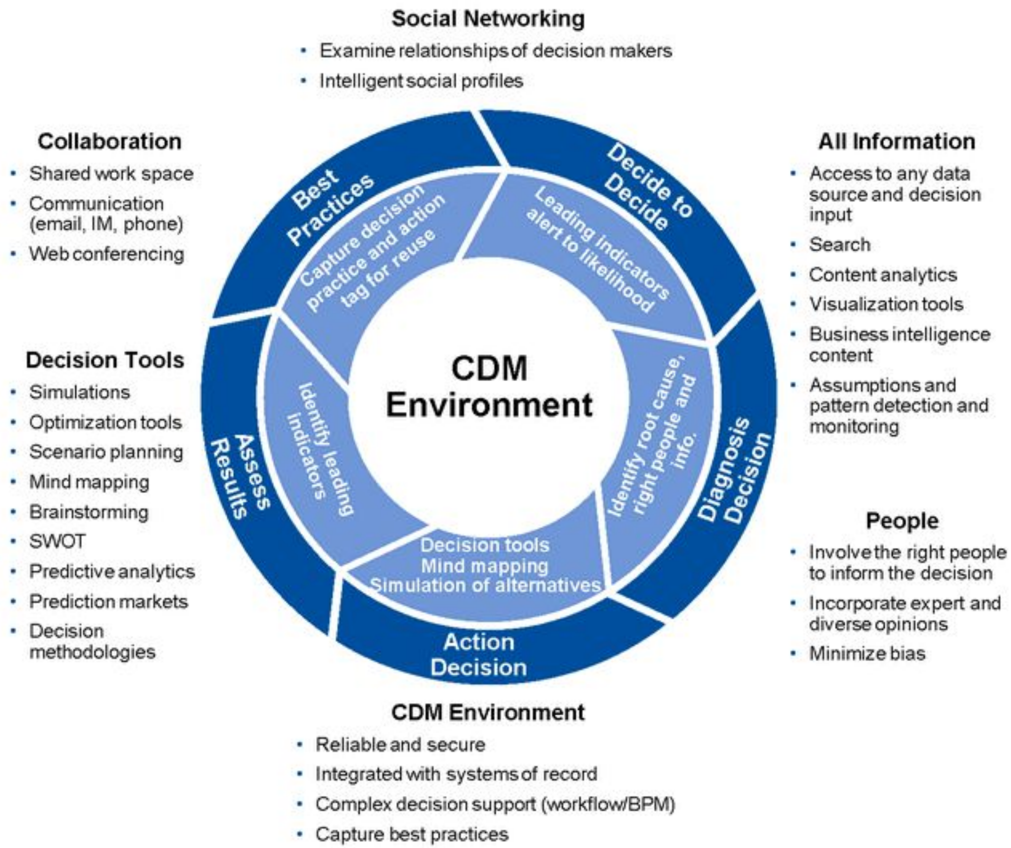


Source: Gartner, 2011, Who's Who in Collaborative Decision Making

Расчет рынка People as the Platform

с позиции Supply Side

WW Рынок "People as Platform" с позиции Supply Side

WW Social Platforms Market *) ($M)	2008	2009	2010	2011	2012	2013	2014
Market Volume ($M)	$229	$379	$501	$692	$957	$1 322	$1 828
Y/Y Growth Rate		66%	32%	38%	38%	38%	38%
WW E-Recruitment Software ($M)	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**
Market Volume ($M)	$576	$660	$750	$842	$943	$1 056	$1 183
Y/Y Growth Rate		15%	14%	12%	12%	12%	12%
WW Corporate Learning Software ($M)	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**
Market Volume ($M)	$230	$294	$376	$492	$645	$844	$1 106
Y/Y Growth Rate		28%	28%	31%	31%	31%	31%
WW Collaborative Decision Making Software ($M)	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**
Market Volume ($M)	$120	$146	$188	$240	$307	$393	$503
Y/Y Growth Rate		22%	29%	28%	28%	28%	28%
WW TOTAL "People as Platform" Software ($M)	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**
Market Volume ($M)	$1 155	$1 479	$1 815	$2 266	$2 852	$3 616	$4 620
Y/Y Growth Rate		28%	23%	25%	26%	27%	28%
WW TOTAL "People as Platform" Professional Services ($M)	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**
Market Volume ($M)	$231	$296	$380	$490	$630	$820	$1 070
Y/Y Growth Rate		28%	28%	29%	29%	30%	30%
WW TOTAL "People as Platform" Market ($M)	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**
Market Volume ($M)	**$1 386**	**$1 775**	**$2 195**	**$2 756**	**$3 482**	**$4 436**	**$5 690**
Y/Y Growth Rate		**28%**	**24%**	**26%**	**26%**	**27%**	**28%**

Source: Gartner, Forrester, IDC, Ovum, Real Story Group, Linex estimates

**) Social Platforms incl. Social Innovation, Social CRM, Externally Facing Social Software, Social Software in the Workplace*

Российский рынок People as the Platform
с позиции Supply Side

WW TOTAL "People as Platform" Market ($M)	2008	2009	2010	2011	2012	2013	2014
Market Volume ($M)	$935	$1 247	$1 579	$2 039	$2 654	$3 483	$4 606
Y/Y Growth Rate		33%	27%	29%	30%	31%	32%
Российский рынок "People as Platform" ($M)	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**
Market Volume ($M)		$2,5	$6,0	$14,0	$25,0	$37,5	$52,5
Y/Y Growth Rate			140%	133%	79%	50%	40%
% of WW Market		0,20%	0,38%	0,69%	0,94%	1,08%	1,14%

Source: Linex

Для справки
Российские сегменты корпоративных приложений составляют от 0,2% до 3% от объема мировых рынков этих приложений.
Например, для сегментов ERP, CRM, SCM эти доли в 2010 составили:

	Russia ($M)	WW ($M)	Russia as WW%
ERP	$348	$37 309	0,93%
CRM	$69	$27 394	0,25%
SCM	$111	$18 147	0,61%

Source: IDC

Расчет рынка People as the Platform

с позиции Demand Side

ALTIMETER

How Corporations Should Prioritize Social Business Budgets

Corporations must budget spending based on their maturity level.

February 10, 2011

2010 2011

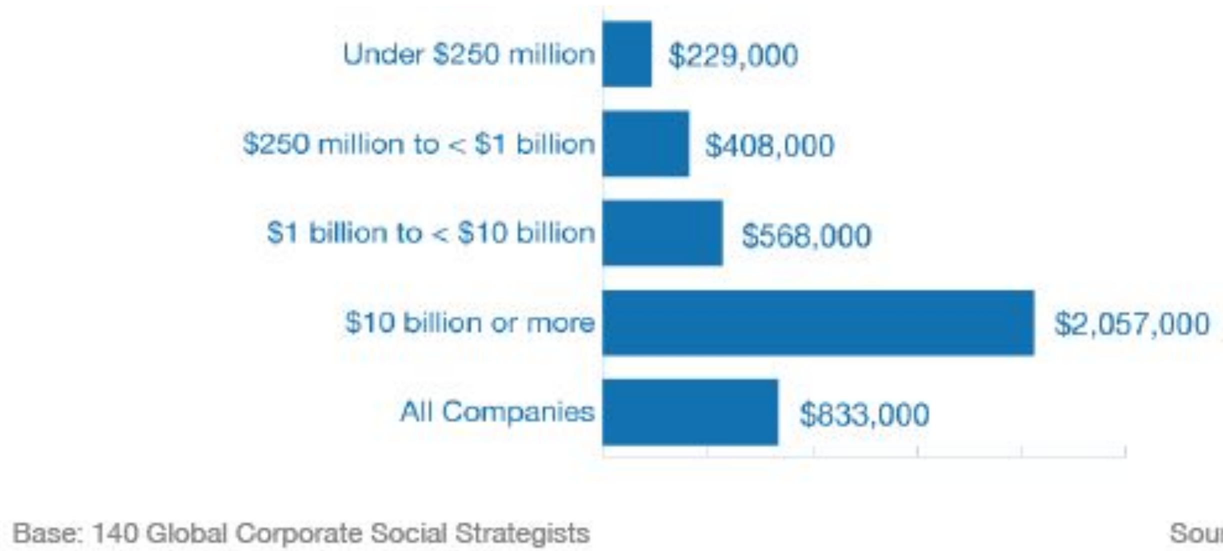
	2010	2011	% Change
Internal Soft Costs			
Staff to Manage	$190,000	$278,000	46%
Research and Development	$40,000	$47,000	18%
Training and Education	$18,000	$23,000	28%
Customer-Facing Initiatives			
Ad/Marketing Spend	$104,000	$160,000	54%
Traditional Agencies (deploying SM	$104,000	$120,000	15%
Boutique Agencies (specializing in SM)	$78,000	$108,000	38%
Influencer/Blogger Programs	$31,000	$47,000	52%
Technology Investments			
Community Platforms	$92,000	$129,000	40%
Brand Monitoring	$63,000	$98,000	56%
Custom Technology Development	$53,000	$90,000	70%
Social CRM	$19,000	$37,000	95%
Social Media Management Systems	$14,000	$22,000	57%

Base: 140 Global Corporate Social Strategists who have adopted each social business category

В 2011 затраты средней компании на приобретение и внедрение внешнего SW и услуг для Social Business составляли: $129K + $37K = $166K

Source: Altimeter Group, 2011, How Corporations Should Prioritize Social Business Budgets

Но в зависимости от своих доходов, компании по-разному расходуют на Social Business



27%

49%

68%

247%

100%

2011, [How Corporations Should Prioritize Social Business Budgets]

Внешние затраты компаний (в зависимости от их доходов) на SW и услуги для Social Business таковы

Доход компании	Затраты ($ тыс.) на приобретение внешнего SW и услуг для Social Business		
$10B и более	**247%**		**$410**
$1B - < $10B	**68%**	**X $166K =**	**$113**
$250M - < $1B	**49%**		**$81**
< $250M	**27%**		**$46**

Внешние затраты компаний (в зависимости от их доходов) на SW для Social Business таковы

Доход компании	Число компаний *)	Затраты ($ тыс.) на приобретение внешнего SW для Social Business
$10B и более	**20**	**$8 198**
$1B - < $10B	**180**	**$20 374**
$250M - < $1B	**200**	**$16 261**
< $250M	**100 **)**	**$4 564**
	ИТОГО:	**$49 397**

*) Рейтинг крупнейших компаний - "Эксперт-400", 2011
**) оценка Linex

Это и есть оценка нижней границы (поскольку учтено только TOP 500 компаний) Demand Side российского рынка SW и услуг для Social Business (композитный рынок People as the Platform)

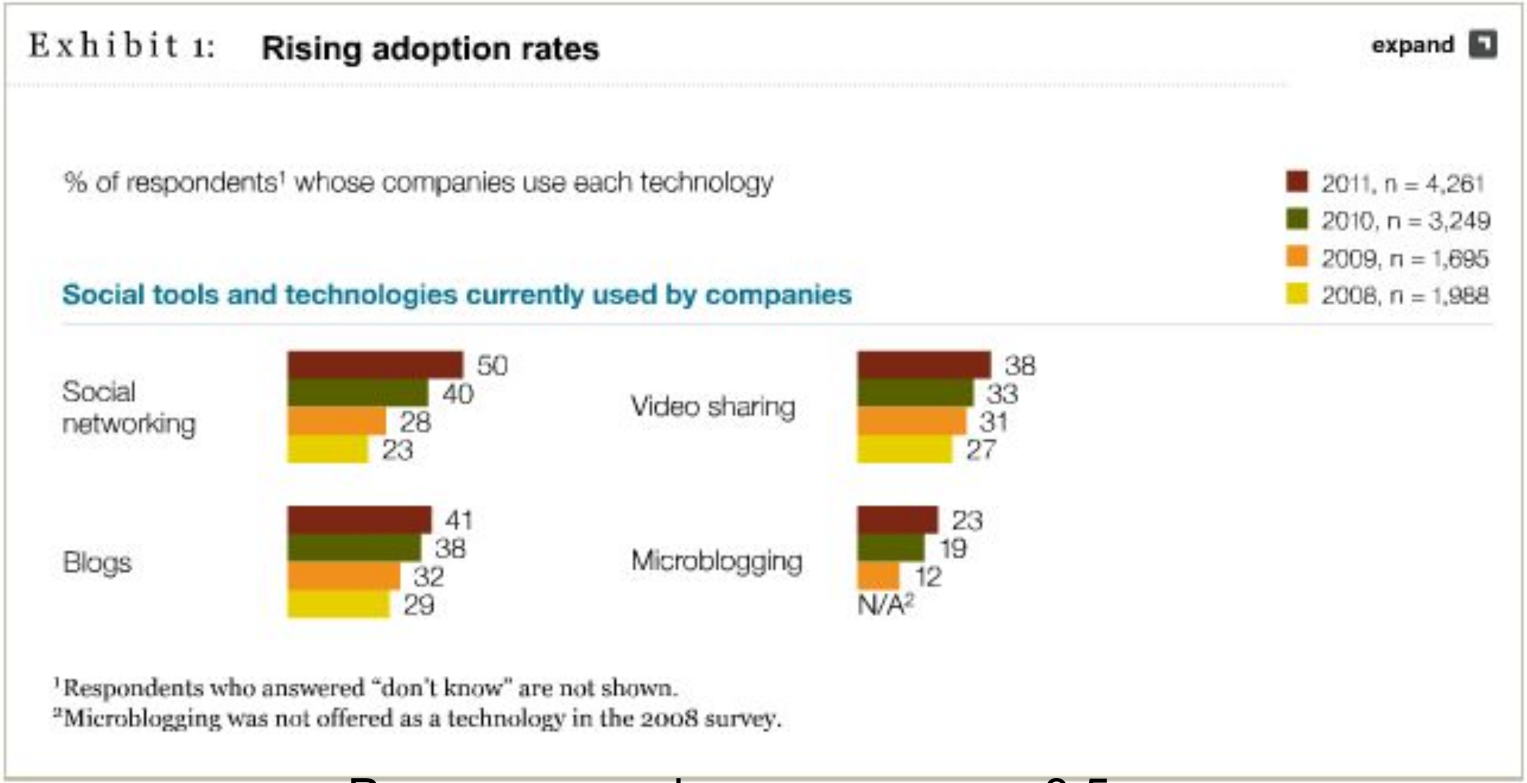
Прогноз динамики рынка

People as the Platform

Сравнение Supply и Demand Sides рынка в 2011

• Supply Side	$14 млн.
• Demand Side	$49 млн.
• Расхождение	3,5 раза

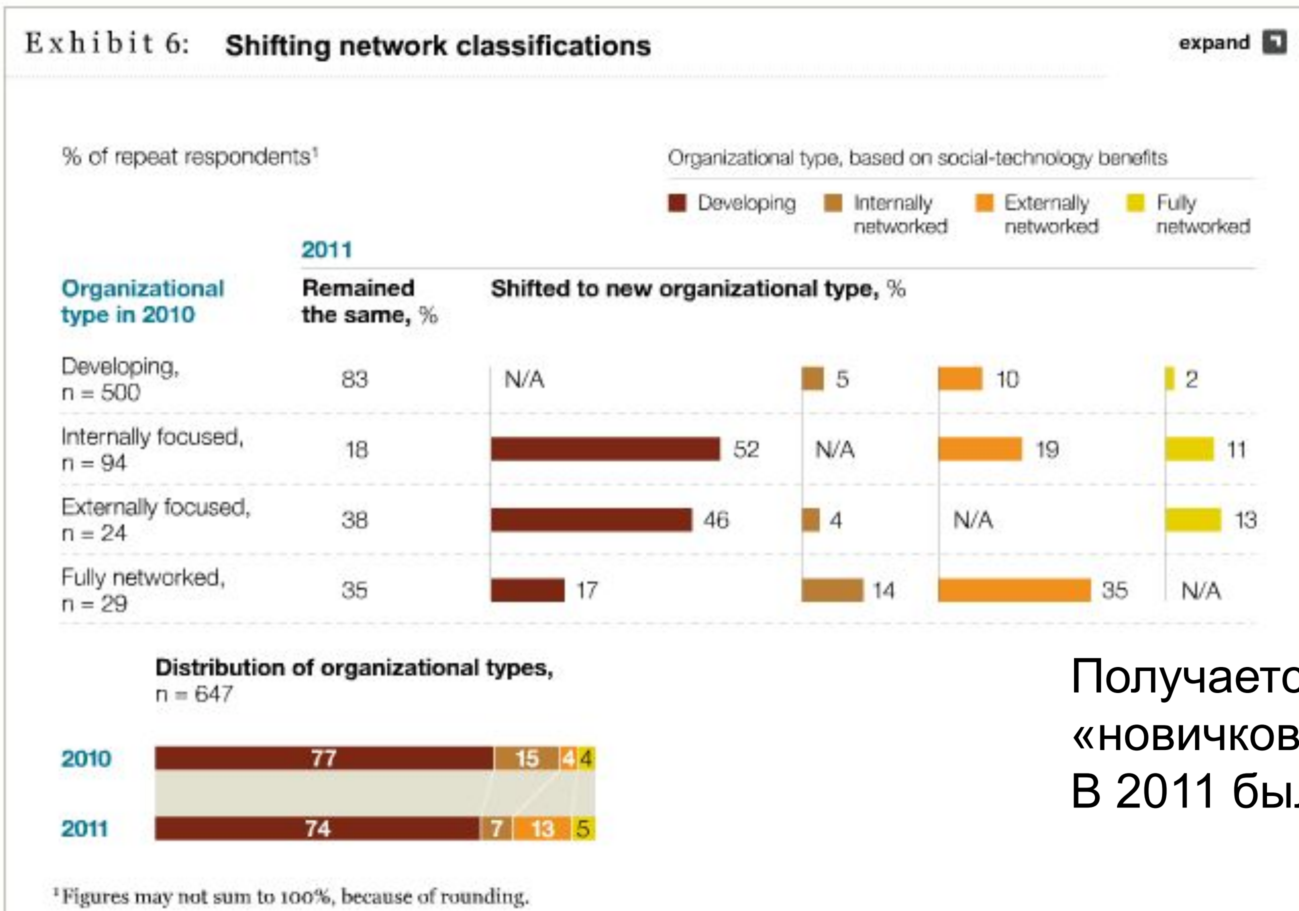
1я причина расхождения – процент использующих эти технологии



Получается, что в России эти цифры примерно в 3,5 раза ниже.
Т.е. мы отстаем больше, чем на 4 года

Source: McKinsey, 2011, How social technologies are extending the organization

2я причина расхождения – уровень продвинутости клиентов в применении этих технологий



Получается, что в России «новичков» (Developing) В 2011 было более 95%

Source: McKinsey, 2011, [How social technologies are extending the organization]

Из-за 3,5 кратного превышения Demand Side над Supply Side в ближайшие 3 года

- Российский композитный рынок «People as Platform» будет расти вдвое быстрее мирового - CAGR%2012-2014: 56% vs 27%
- За эти годы доля российского композитного рынка «People as Platform» в мировом вырастет с 0,51% до 0,92%
  (для справки: доля российского рынка ERP в мировом уже в 2011 составляла 0,93%)
- Процент использующих эти технологии в России в 2014 будет все еще ниже сегодняшнего уровня на западе (примерно 50%)
- В 2014 примерно 20% российских компаний перестанут быть «новичками» в области использования «People as Platform» (достигнут 2го уровня зрелости), а примерно 5% компаний достигнут 4го уровня зрелости (Fully

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