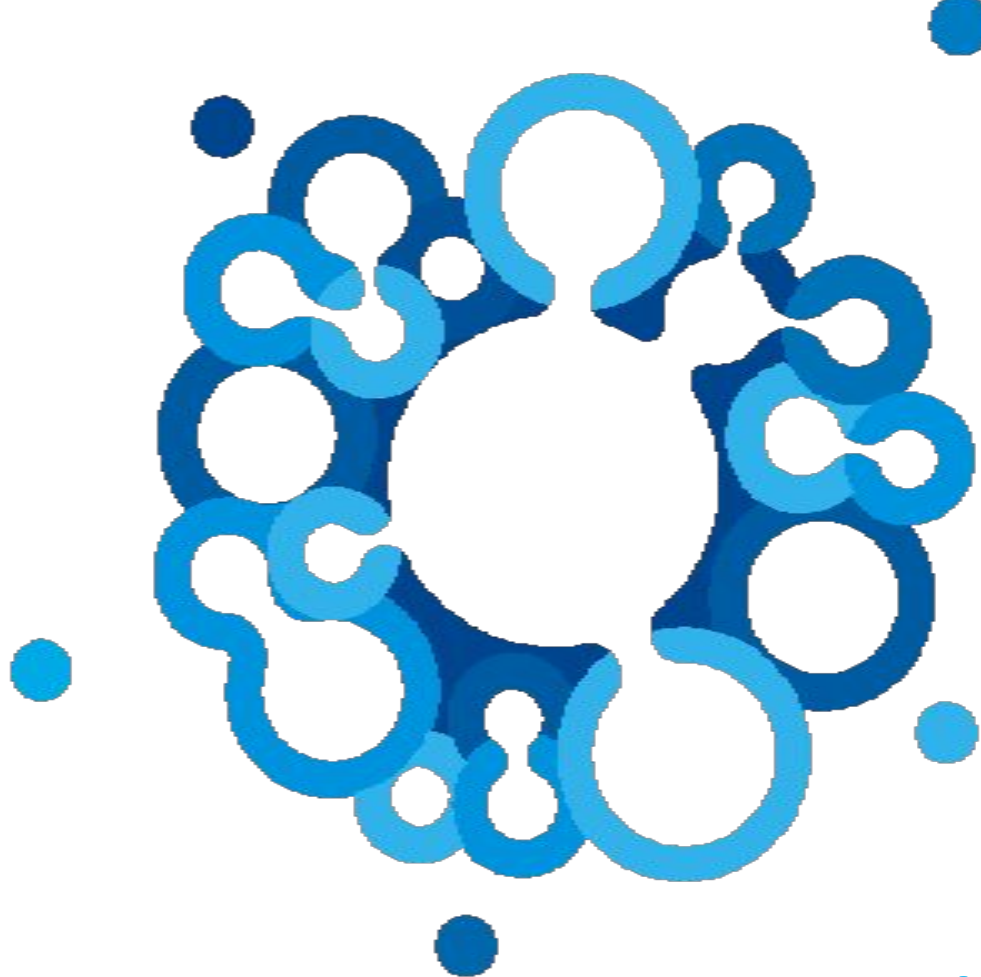# Мировой и российский рынки

People as the Platform

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
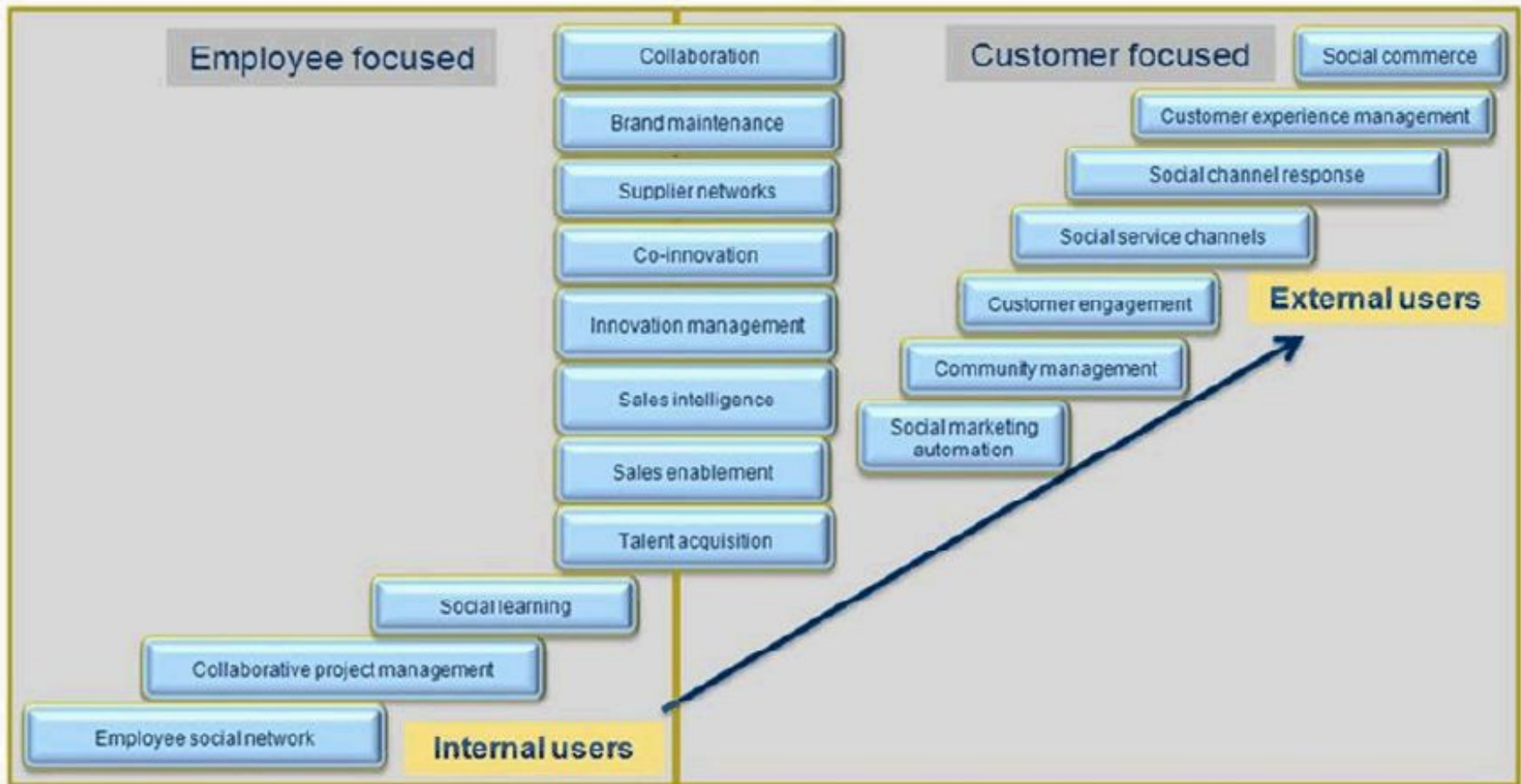
Source: Gartner, 2011, Business Gets Social Innovation Key Initiative Overview
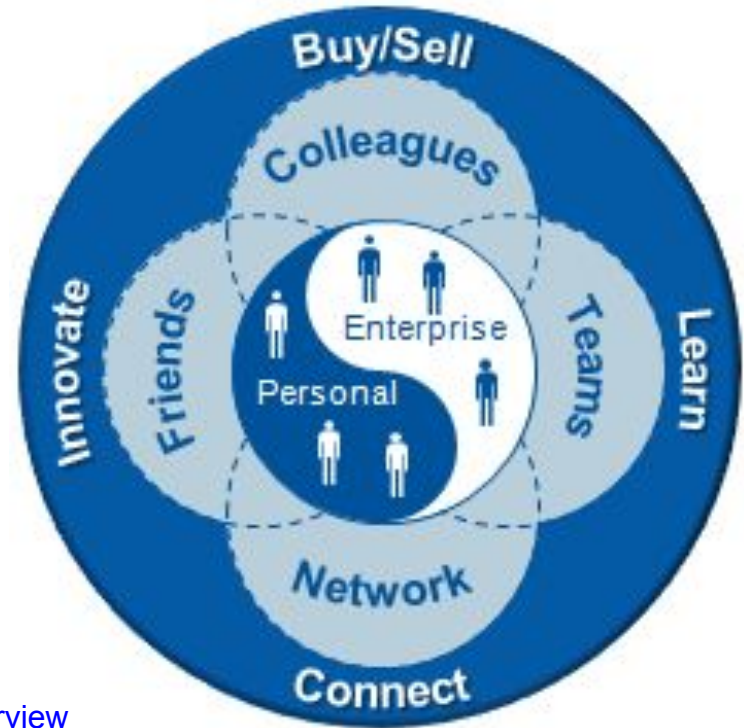
Единственный способ корректно посчитать рынок с Supply Side - сегментировать его по релевантным классам/сегментам приложений

4

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

Social Business Impact (Business Process)

Т.е. социальные технологии затрагивают все звенья бизнеса

Social Business Impact (Process and Technology)

Digital commerce (mobile, social, electronic)

Employee focused | Collaboration | **Customer focused** | Social commerce

Brand maintenance — Contact center

Supplier networks — Social channel response

Co-innovation — Customer service

Innovation manage... — Marketing — **External users**

Community management

Sales — automation

Sales enablement

HCM

PPM — ...nagement

Enterprise social software — Employee social network — **Internal users**

Socialytics (network behavior, content, social data, customer behavior)

Source: IDC, 2011 IDC's Social Business   Taxonomy

6

Это подтверждается наличием бенефитов практически для всех звеньев бизнеса
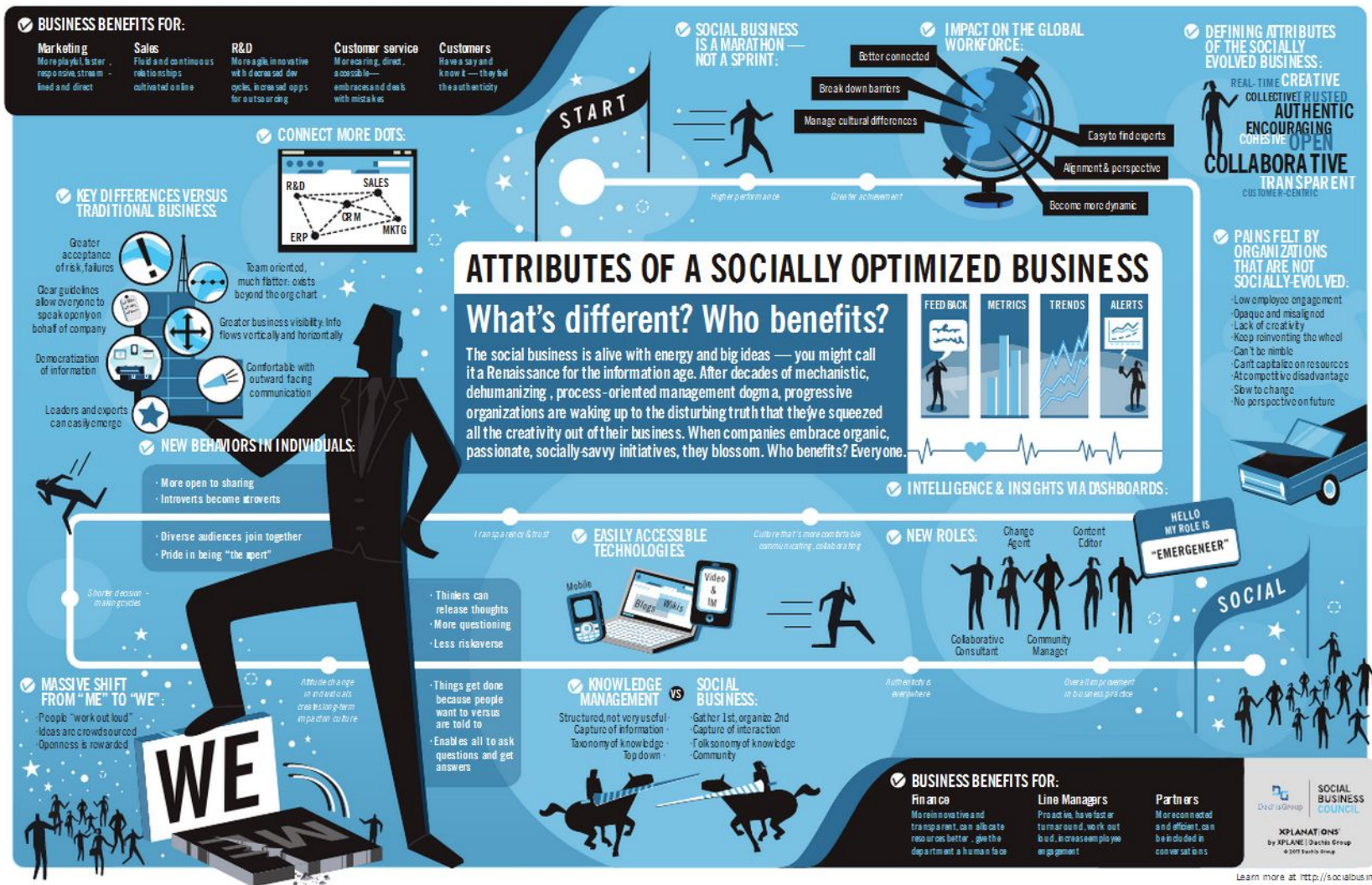
… из чего следует и наличие ответственных за Social Business практически во всех департаментах

Source: Dachis Group | XPLANE, 2011, Who's responsible for social business?
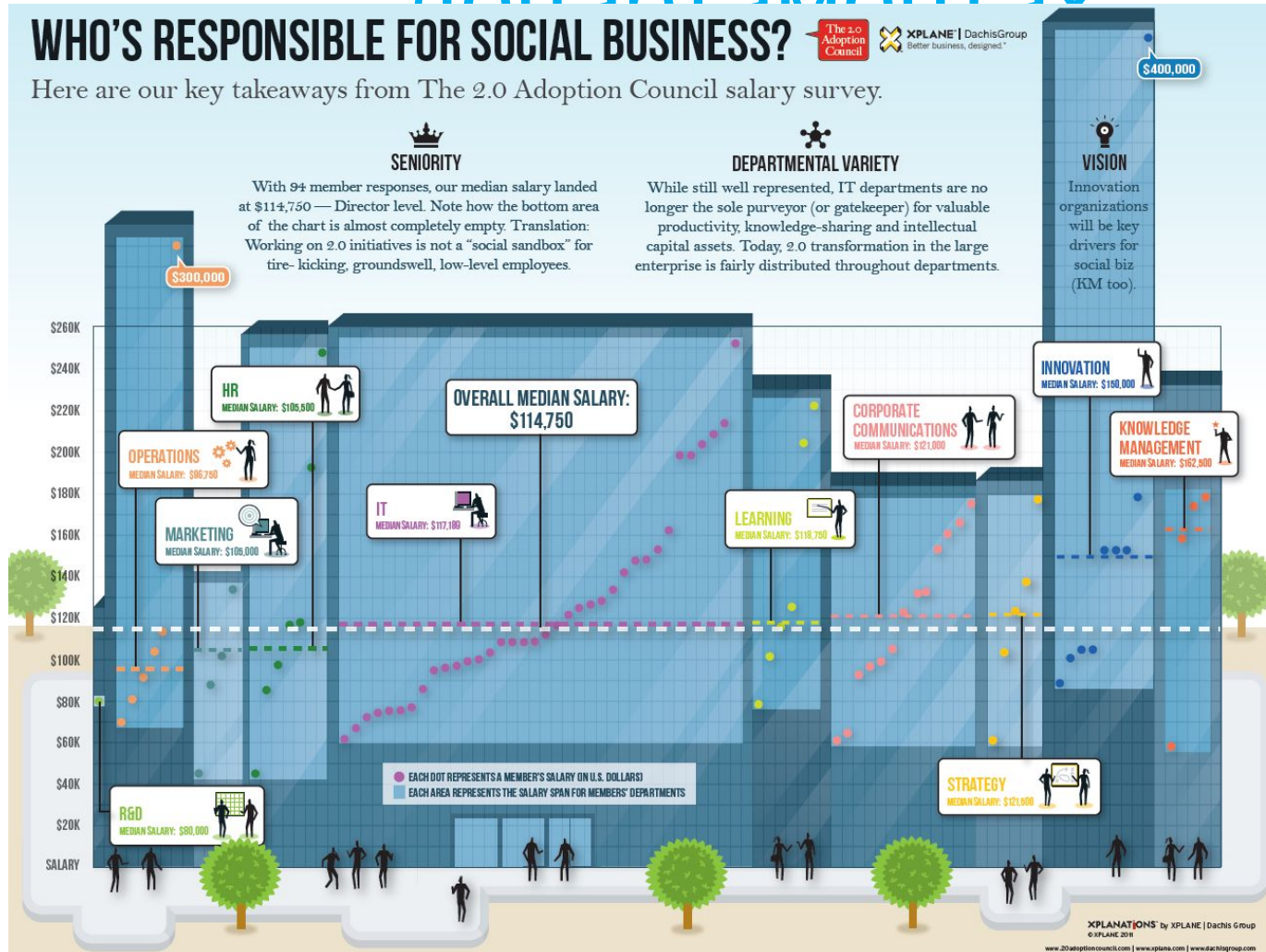
В итоге получается примерно такой набор релевантных классов

Social Business Impact (Technology Markets)

Social business market

Collaborative applications
- Enterprise social software
  - Innovation management
- ERM
  - PPM
    - Collaborative project management
  - HCM
    - Talent acquisition
    - Social learning

CRM
- Sales
  - Sales intelligence
  - Sales enablement
- Marketing
  - Social marketing automation
- Customer service
  - Community management
- Contact center
  - Social channel response

Digital commerce
- Customer experience management
- Social commerce
- Supplier networks

Legend
- Compound market
- Secondary software markets
- Functional software markets
- Subtheme

Socialytics
- Social collaboration analytics
- Social data analytics
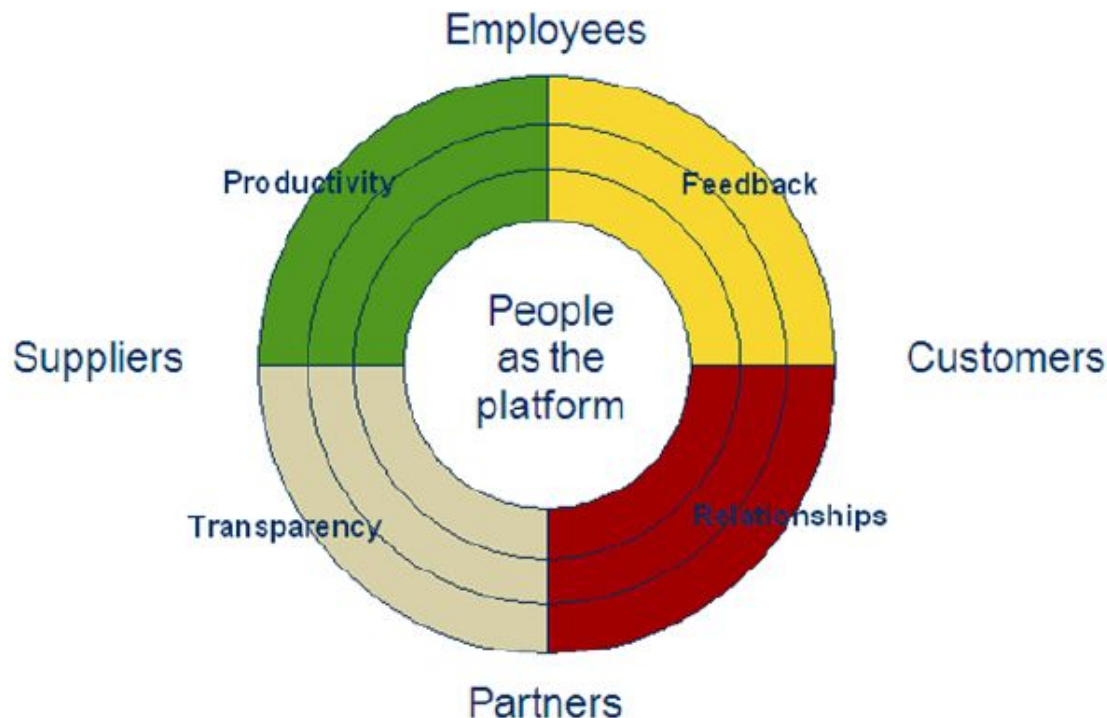- Text analytics
- Social relationship analytics

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

The Social Business: Cultural Impact

Employees

Productivity   Feedback

Suppliers   People as the platform   Customers

Transparency   Relationships

Partners

Source: IDC, 2010 Social Business Framework

*) определение IDC

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

The Social Business: Market Impact

Consumer apps.	Collab.	CRM	Content apps.	PLM
Social platforms				
Socialytics				
EPPM	SCM	HCM	Financials	

Standalone social apps.

Standalone social platforms

Embedded social features

Source: IDC, 2010   Social Business Framework

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

Social Business Framework

Market factors
- Competition
- Brand awareness
- Social customer
- Economy
- Workforce dynamics

Social business

Social software
- Social platform
- Social application
- Social feature

Social objectives
- Customer engagement
- Employee empowerment
- Partner enablement
- Supplier engagement

Social output
- Content (social media)
- Community (social network)

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:

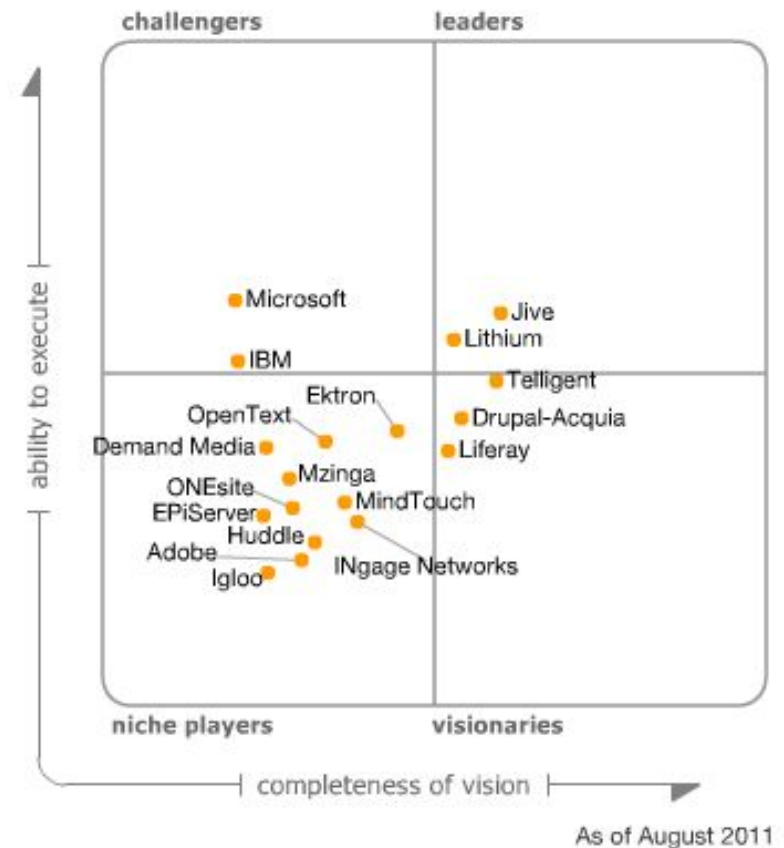- Sopheon

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

As of July 2011
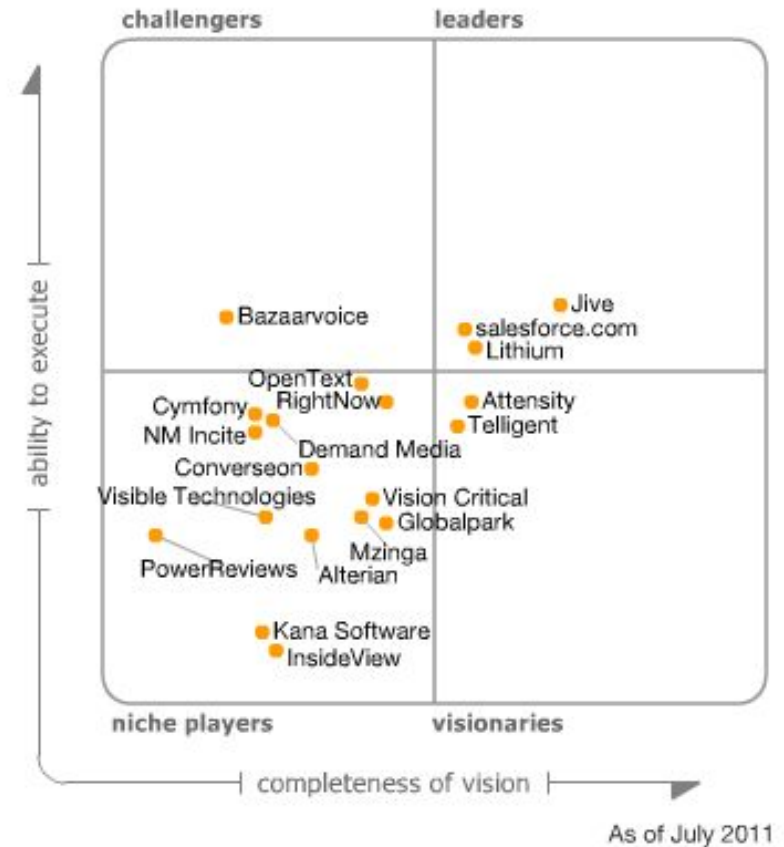
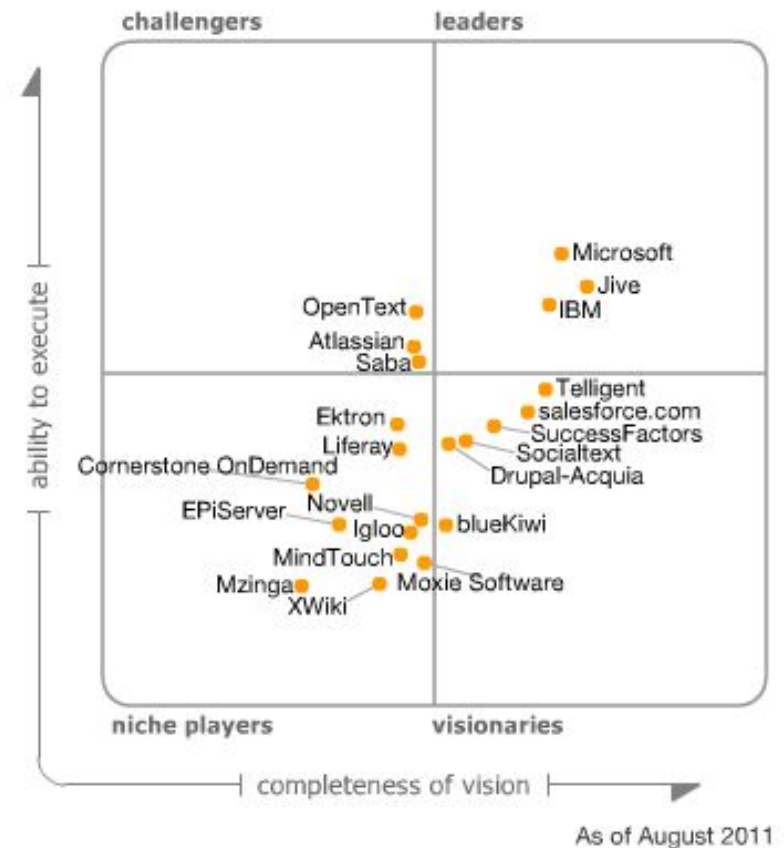# 3. Сегмент Externally Facing Social Software

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.

challengers | leaders

ability to execute

- Microsoft
- Jive
- Lithium
- IBM
- Telligent
- Ektron
- OpenText
- Drupal-Acquia
- Demand Media
- Liferay
- Mzinga
- ONEsite
- MindTouch
- EPiServer
- Huddle
- Adobe
- INgage Networks
- Igloo

niche players | visionaries

completeness of vision

As of August 2011

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

Magic Quadrant with axes "ability to execute" (vertical) and "completeness of vision" (horizontal); quadrants labeled challengers, leaders, niche players, visionaries. Vendors plotted: Microsoft, Jive, IBM, OpenText, Atlassian, Saba, Telligent, salesforce.com, SuccessFactors, Socialtext, Drupal-Acquia, Ektron, Liferay, Cornerstone OnDemand, EPiServer, Novell, Igloo, blueKiwi, MindTouch, Mzinga, XWiki, Moxie Software. As of August 2011.

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

18
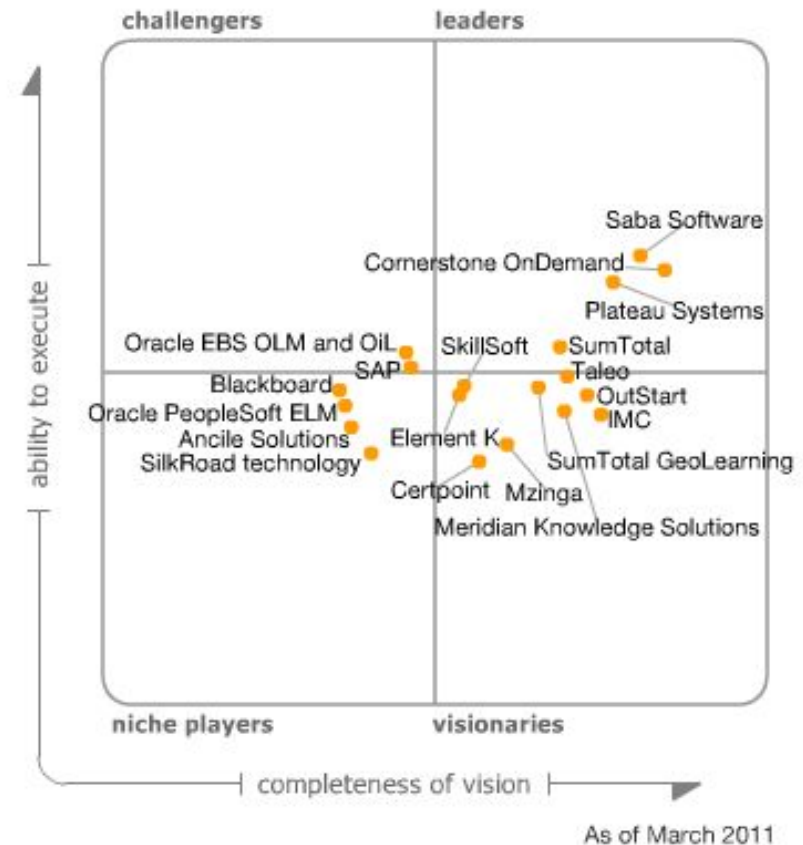
6. Сегмент E-Recruitment Software

- 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

As of November 2009
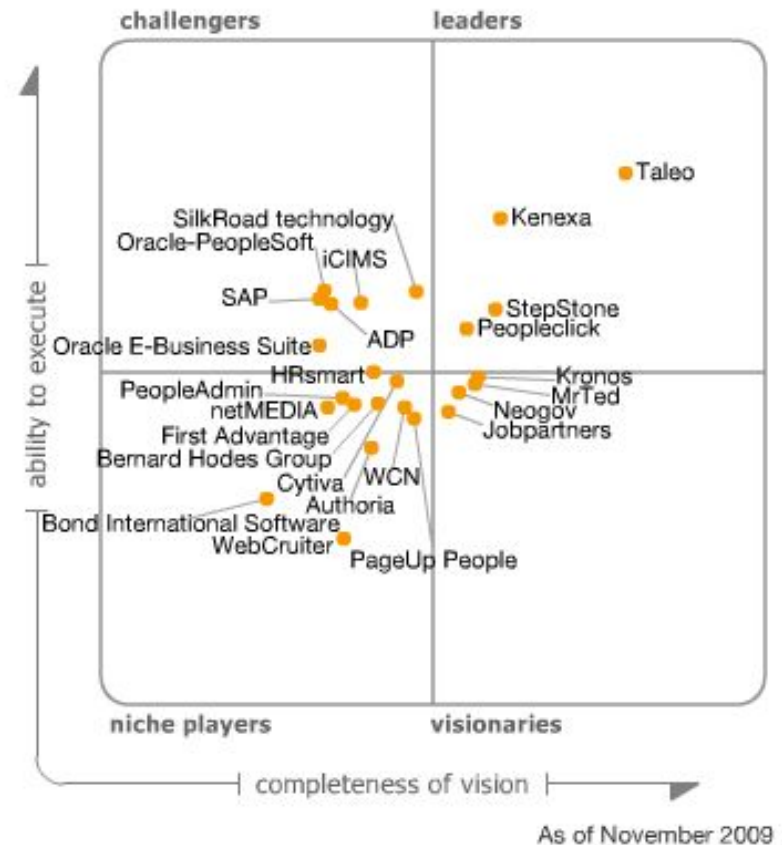
7. Сегмент Collaborative Decision Making
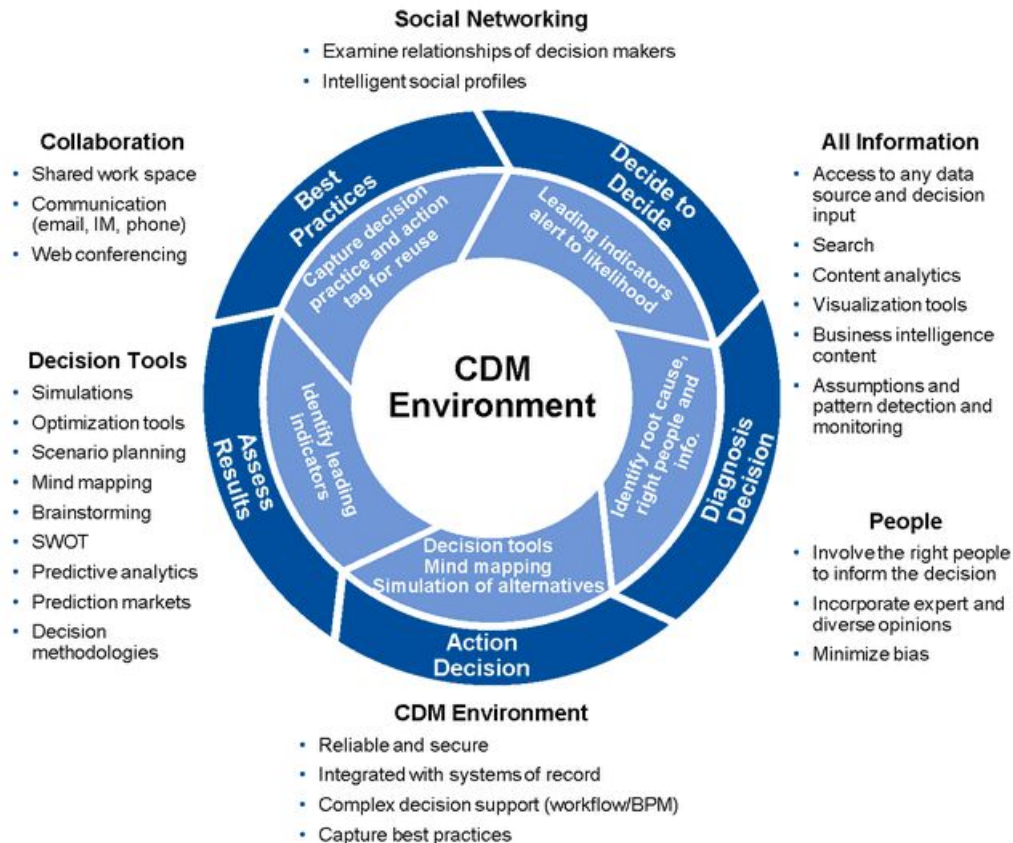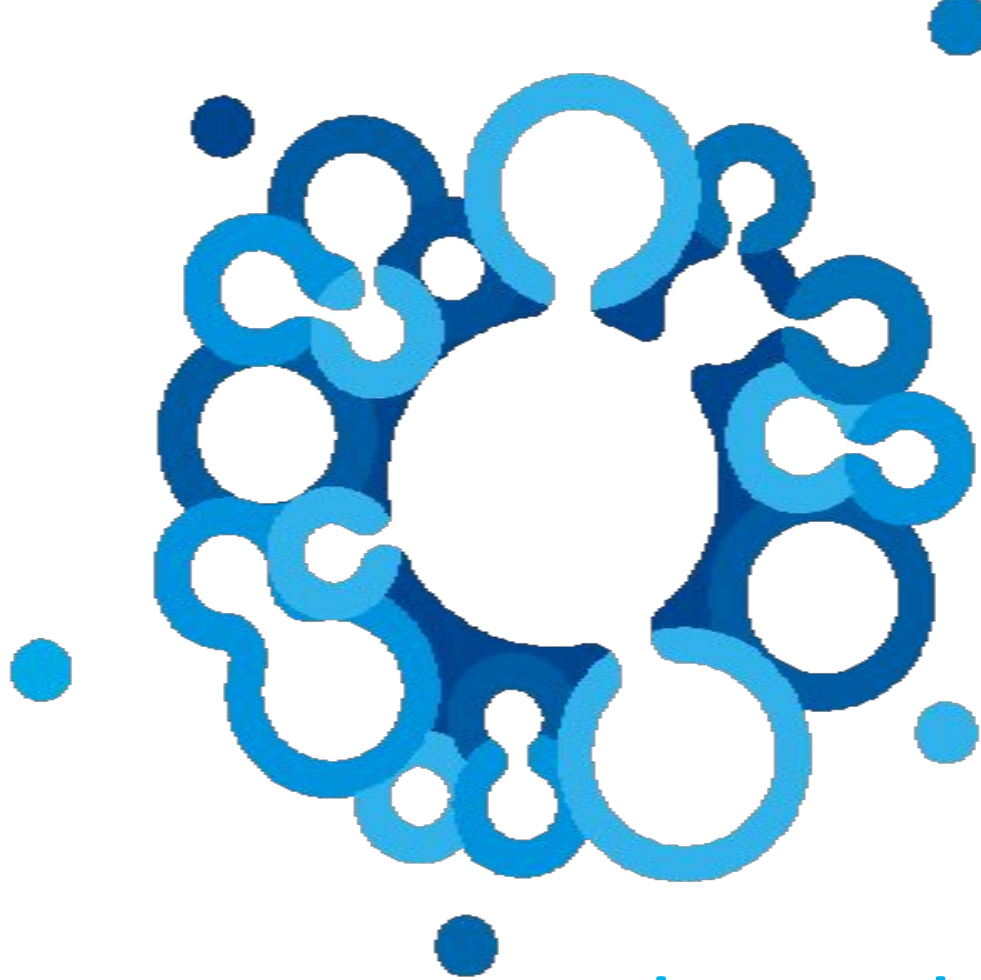
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Social Networking
- Examine relationships of decision makers
- Intelligent social profiles

Collaboration
- Shared work space
- Communication (email, IM, phone)
- Web conferencing

Decision Tools
- Simulations
- Optimization tools
- Scenario planning
- Mind mapping
- Brainstorming
- SWOT
- Predictive analytics
- Prediction markets
- Decision methodologies

All Information
- Access to any data source and decision input
- Search
- Content analytics
- Visualization tools
- Business intelligence content
- Assumptions and pattern detection and monitoring

People
- Involve the right people to inform the decision
- Incorporate expert and diverse opinions
- Minimize bias

CDM Environment

Best Practices — Capture decision practice and action tag for reuse

Decide to Decide — Leading indicators alert to likelihood

Diagnosis Decision — Identify root cause, right people and info.

Action Decision — Decision tools, Mind mapping, Simulation of alternatives

Assess Results — Identify leading indicators

CDM Environment
- Reliable and secure
- Integrated with systems of record
- Complex decision support (workflow/BPM)
- Capture best practices

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

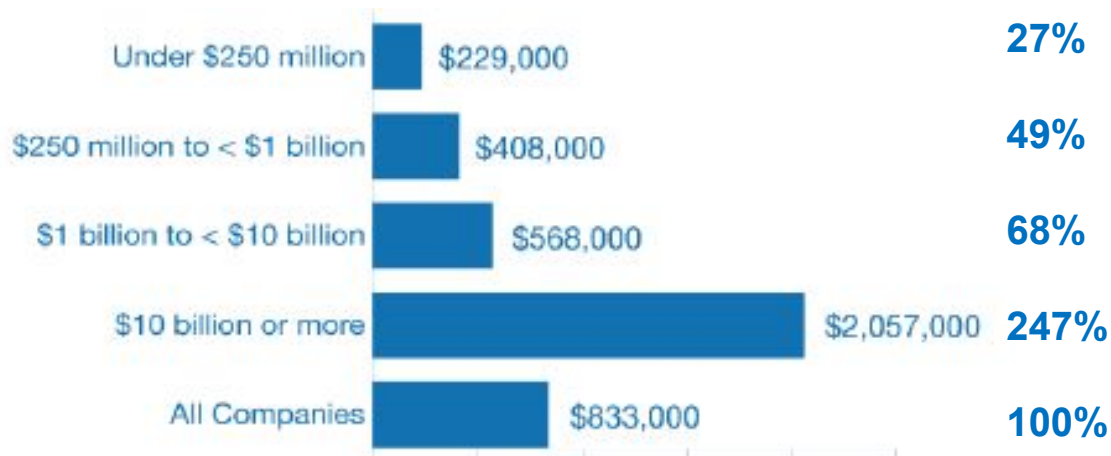|	2010	2011	% Change
Internal Soft Costs			
Staff to Manage	$190,000	$278,000	46%
Research and Development	$40,000	$47,000	18%
Training and Education	$18,000	$23,000	28%
Customer-Facing Initiatives			
Ad/Marketing Spend	$104,000	$160,000	54%
Traditional Agencies (deploying SM	$104,000	$120,000	15%
Boutique 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%

ALTIMETER®

How Corporations Should Prioritize Social Business Budgets

Corporations must budget spending based on their maturity level.

February 10, 2011

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

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

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

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

Under $250 million	$229,000	**27%**
$250 million to < $1 billion	$408,000	**49%**
$1 billion to < $10 billion	$568,000	**68%**
$10 billion or more	$2,057,000	**247%**
All Companies	$833,000	**100%**

Base: 140 Global Corporate Social Strategists

Source: Altimeter Group
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)
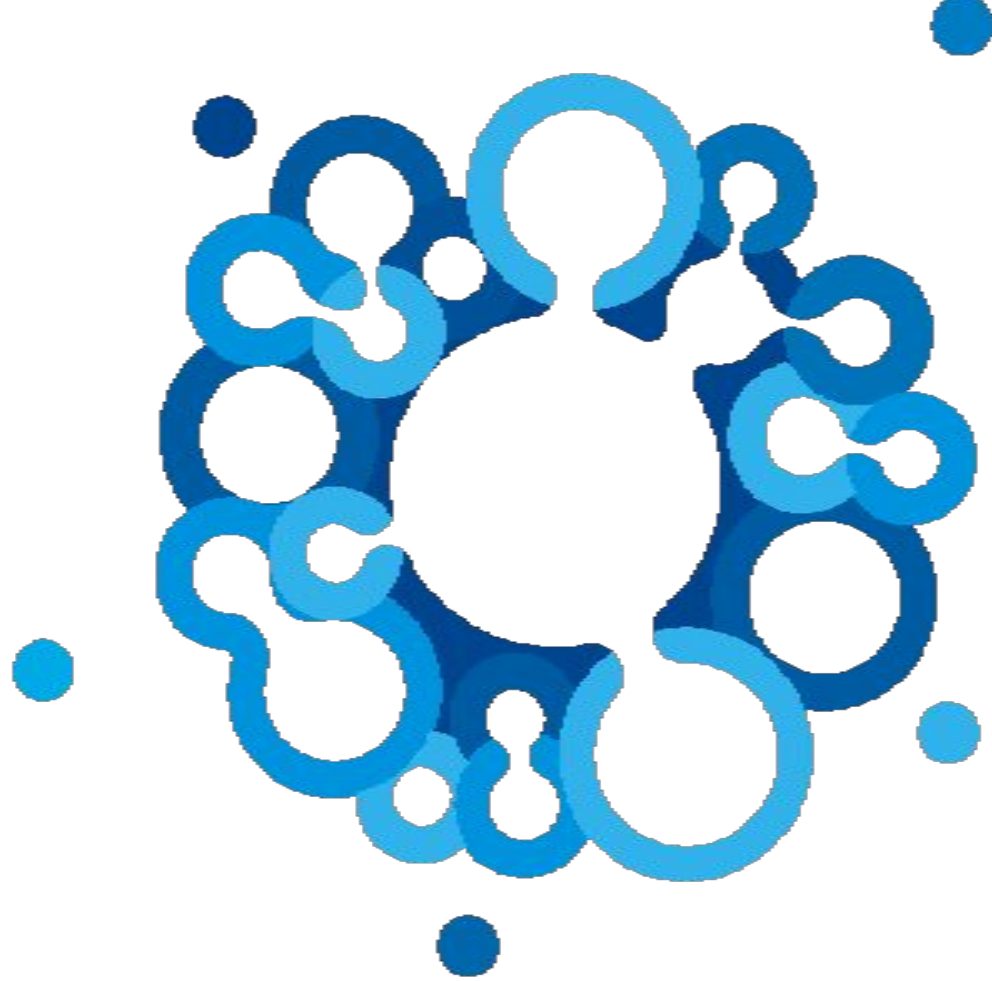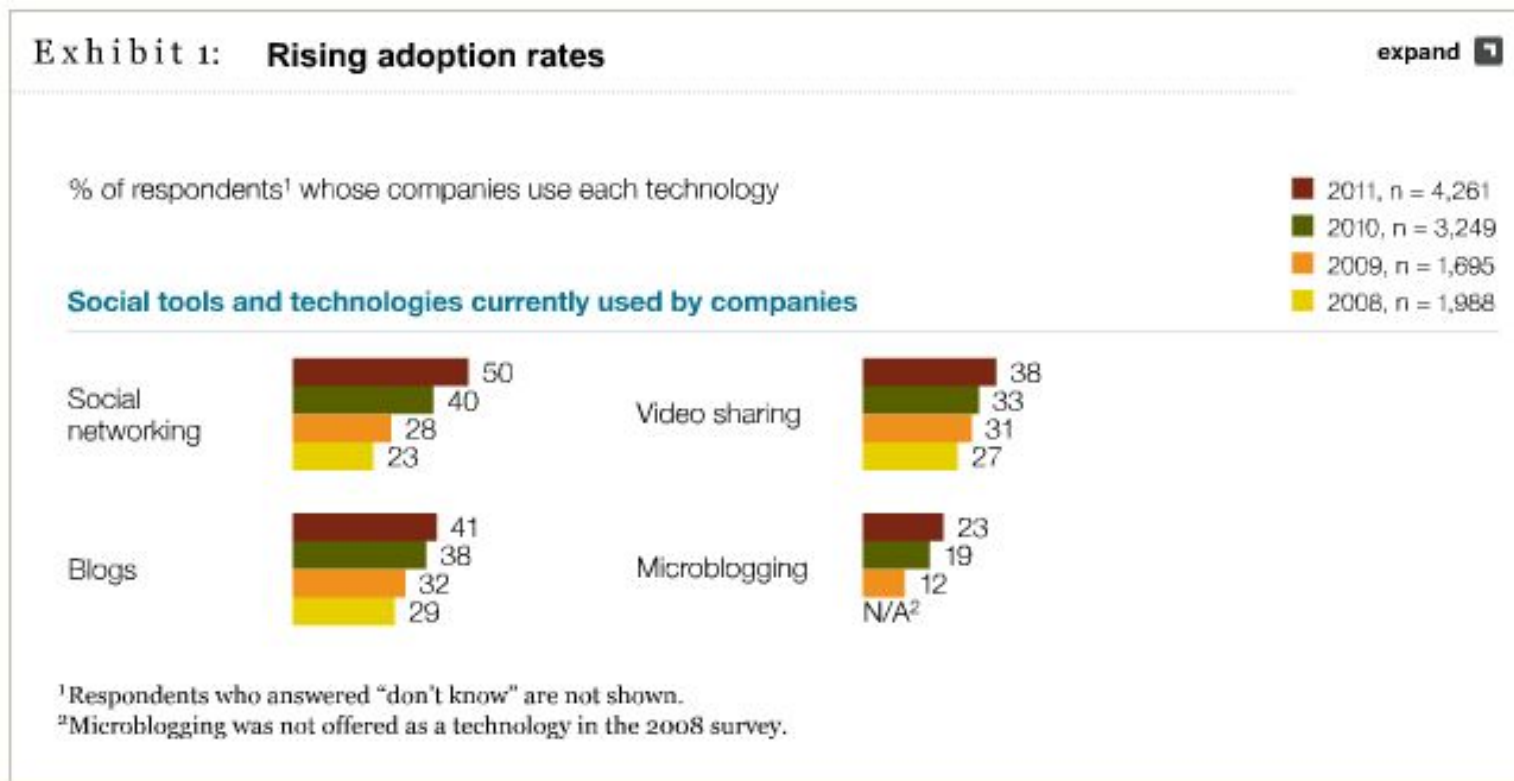
Прогноз динамики рынка

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

Exhibit 1: **Rising adoption rates**   expand

% of respondents[1] whose companies use each technology

- 2011, n = 4,261
- 2010, n = 3,249
- 2009, n = 1,695
- 2008, n = 1,988

Social tools and technologies currently used by companies

Social networking
- 50
- 40
- 28
- 23

Video sharing
- 38
- 33
- 31
- 27

Blogs
- 41
- 38
- 32
- 29

Microblogging
- 23
- 19
- 12
- N/A[2]

[1] Respondents who answered "don't know" are not shown.
[2] Microblogging was not offered as a technology in the 2008 survey.

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

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2я причина расхождения – уровень продвинутости клиентов в применении этих технологий
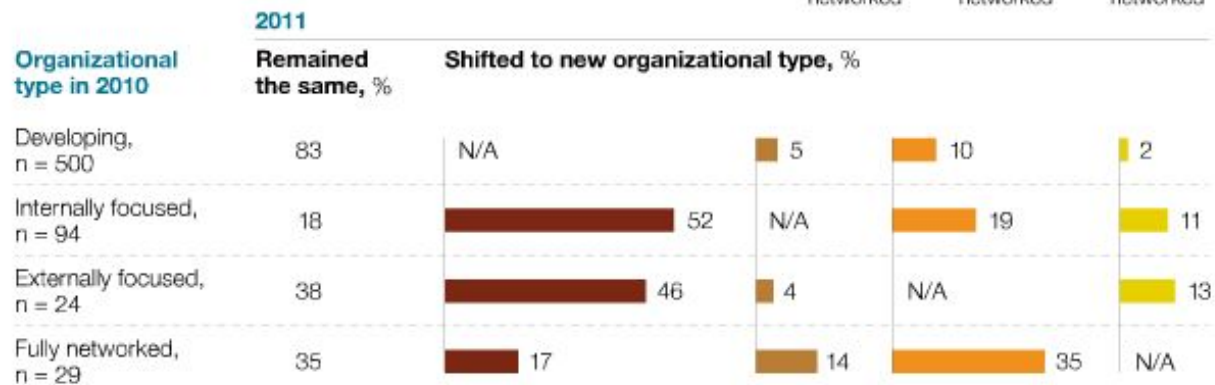
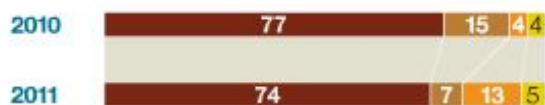Exhibit 6: **Shifting network classifications**   expand

% of repeat respondents[1]

Organizational type, based on social-technology benefits

■ Developing   ■ Internally networked   ■ Externally networked   ■ Fully networked

2011

Organizational type in 2010	Remained the same, %	Shifted to new organizational type, %			
		Developing	Internally networked	Externally networked	Fully networked
Developing, n = 500	83	N/A	5	10	2
Internally focused, n = 94	18	52	N/A	19	11
Externally focused, n = 24	38	46	4	N/A	13
Fully networked, n = 29	35	17	14	35	N/A

Distribution of organizational types, n = 647

2010	77	15	4	4
2011	74	7	13	5

[1] Figures may not sum to 100%, because of rounding.

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

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

www.witology.com