



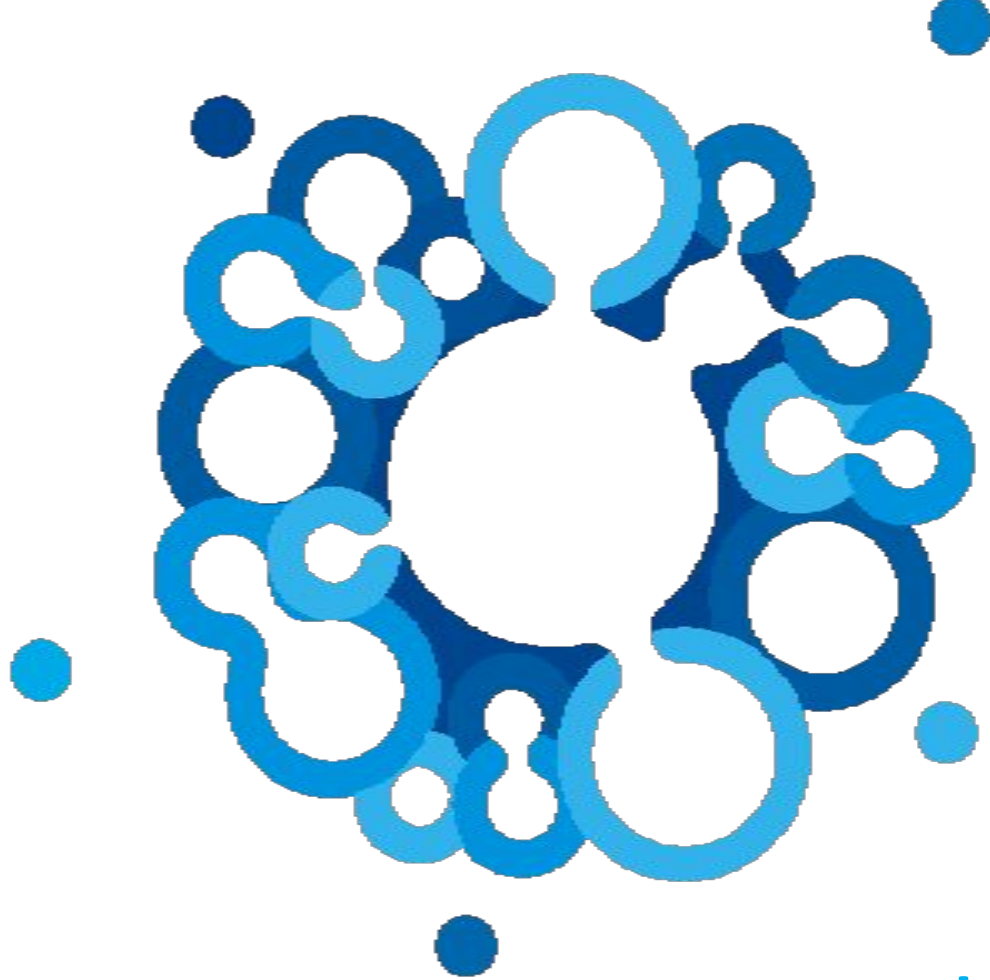
Мировой и российский рынки

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

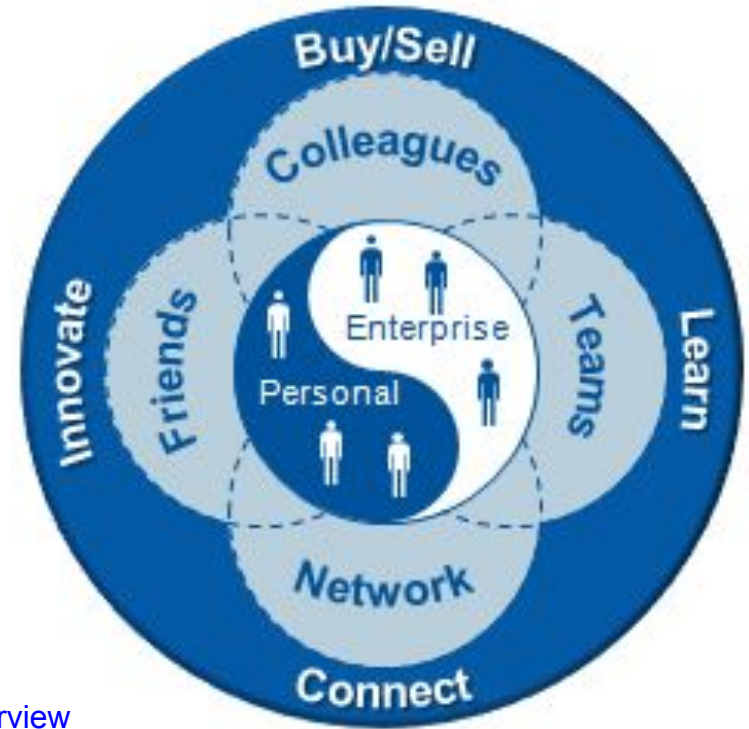


Описание рынка People as the Platform

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

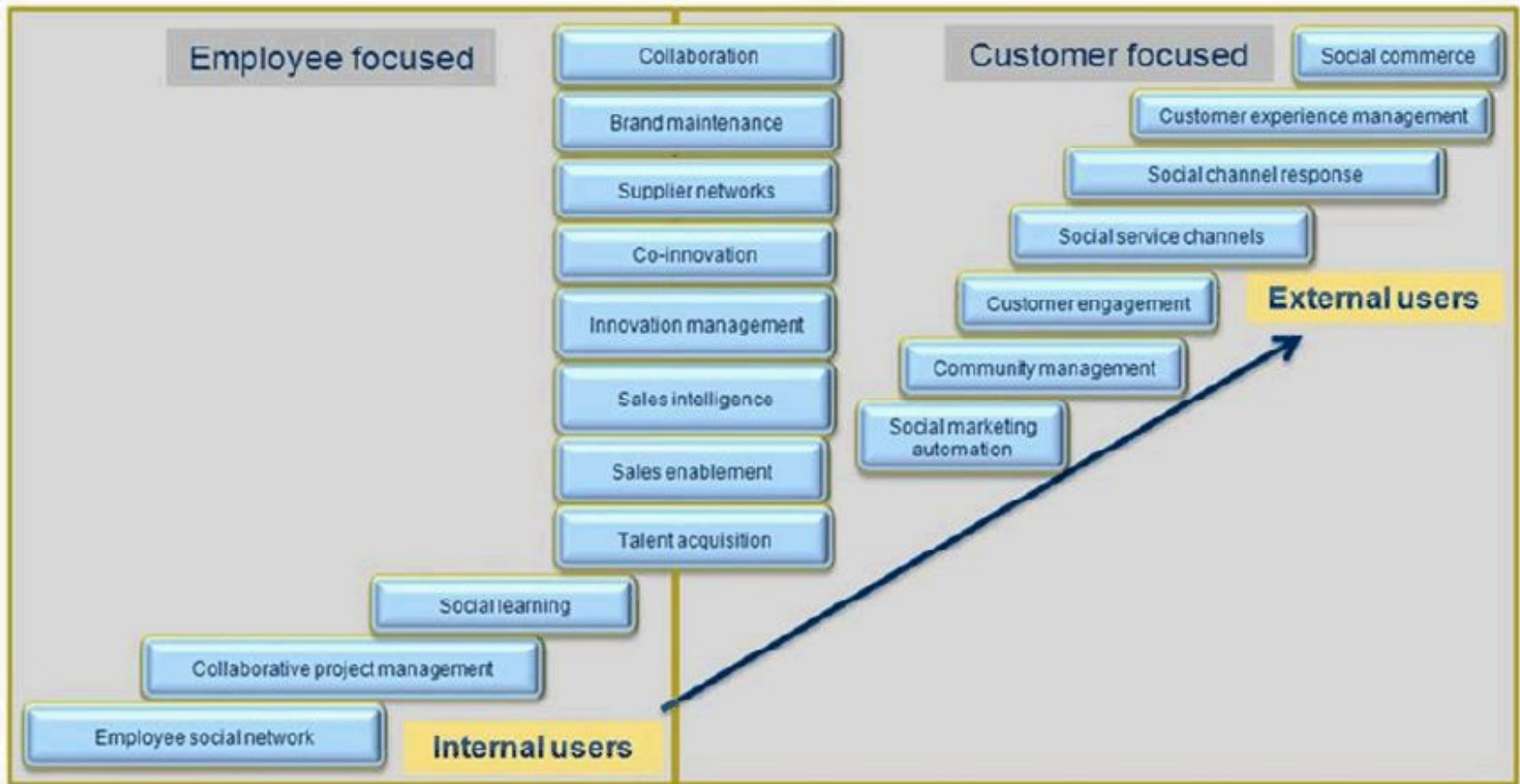
Source: Gartner, 2011, [Business Gets Social Innovation Key Initiative Overview](#)



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

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

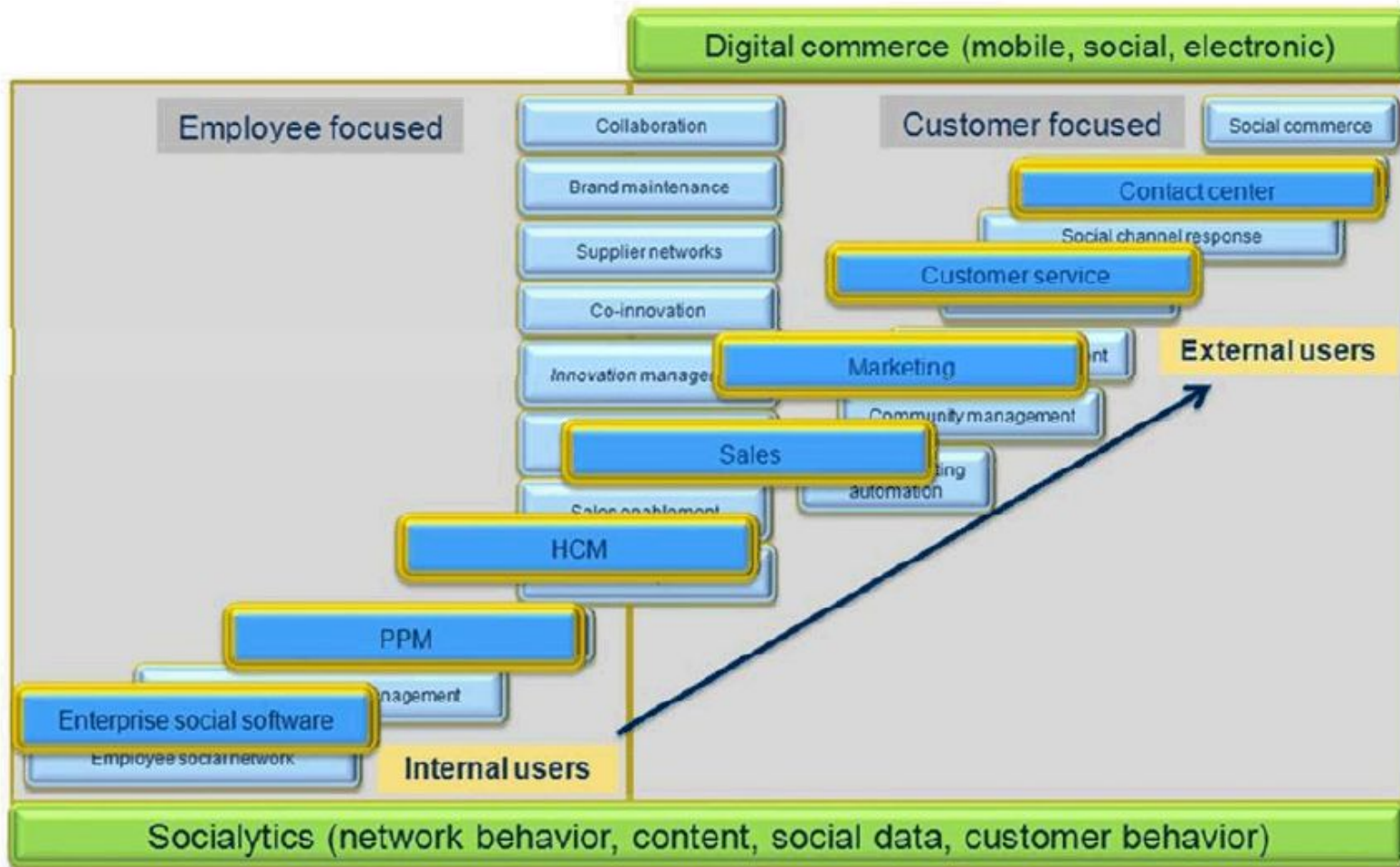
Social Business Impact (Business Process)



Т.е. социальные технологии затрагивают все звенья

бизнеса

Social Business Impact (Process and Technology)



Это подтверждается наличием бенефитов практически для всех звеньев бизнеса

✓ BUSINESS BENEFITS FOR:

Marketing

More playful, faster response, streamlined and direct

Sales

Fluid and continuous relationships cultivated online

R&D

More agile, innovative with ideas and dev cycles, in real time opps for outsourcing

Customer service

More social, direct, accessible — embraces and deals with mistakes

Customers

Have a say and know it — they feel the authenticity

✓ SOCIAL BUSINESS IS A MARATHON — NOT A SPRINT.

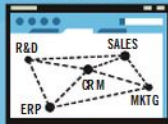
✓ IMPACT ON THE GLOBAL WORKFORCE:



✓ DEFINING ATTRIBUTES OF THE SOCIALLY EVOLVED BUSINESS:

REAL-TIME CREATIVE COLLECTIVE TRUSTED AUTHENTIC ENCOURAGING COMESIVE OPEN COLLABORATIVE TRANSPARENT CUSTOMER-CENTRIC

✓ CONNECT MORE DOTS.



✓ KEY DIFFERENCES VERSUS TRADITIONAL BUSINESS:

- Greater acceptance of risk, failures
- Clear guidelines allow everyone to speak openly on behalf of company
- Democratization of information
- Loaders and experts can easily emerge
- To-mo oriented, much flatter, exists beyond the org chart
- Greater business visibility: Info flows vertically and horizontally
- Comfortable with outward facing communication

✓ NEW BEHAVIORS IN INDIVIDUALS:

- More open to sharing
- Intverts become extroverts
- Diverse audiences join together
- Pride in being "the expert"

ATTRIBUTES OF A SOCIALLY OPTIMIZED BUSINESS

What's different? Who benefits?

The social business is alive with energy and big ideas — you might call it a Renaissance for the information age. After decades of mechanistic, dehumanizing, process-oriented management dogma, progressive organizations are waking up to the disturbing truth that they've squeezed all the creativity out of their business. When companies embrace organic, passionate, socially-savvy initiatives, they blossom. Who benefits? Everyone.



✓ PAINS FELT BY ORGANIZATIONS THAT ARE NOT SOCIALLY-EVOLVED:

- Low employee engagement
- Opaque and misaligned
- Lack of creativity
- Keep reinventing the wheel
- Can't be nimble
- Can't capitalize on resources
- At competitive disadvantage
- Slow to change
- No perspective on future

✓ INTELLIGENCE & INSIGHTS VIA DASHBOARDS:

✓ EASILY ACCESSIBLE TECHNOLOGIES:



✓ NEW ROLES:



HELLO MY ROLE IS "EMERGENEER"

✓ MASSIVE SHIFT FROM "ME" TO "WE":

- People "work out loud"
- Ideas are crowdsourced
- Openness is rewarded

WE

Attitude change in individuals creating a team impact on culture

- Things get done because people want to versus are told to
- Enables all to ask questions and get answers

✓ KNOWLEDGE MANAGEMENT VS SOCIAL BUSINESS:

- Structured, not very useful
- Capture of information
- Taxonomy of knowledge
- Top down
- Gather 1st, organize 2nd
- Capture of interaction
- Folksonomy of knowledge
- Community

✓ BUSINESS BENEFITS FOR:

Finance

More innovative and transparent, can allocate resources better, give the department a human face

Line Managers

Proactive, have faster turnaround, work out loud, increase employee engagement

Partners

More connected and efficient, can be included in conversations

SOCIAL BUSINESS COUNCIL

EXPLANATIONS by SPLANE DASH GROUP © 2011 Dash Group

ОТВЕТСТВЕННЫХ за Social Business практически во всех

ПОДРАЗДЕЛЕНИЯХ

WHO'S RESPONSIBLE FOR SOCIAL BUSINESS?

The 2.0 Adoption Council | XPLANE | DachisGroup
Better business, designed™

Here are our key takeaways from The 2.0 Adoption Council salary survey.

SENIORITY

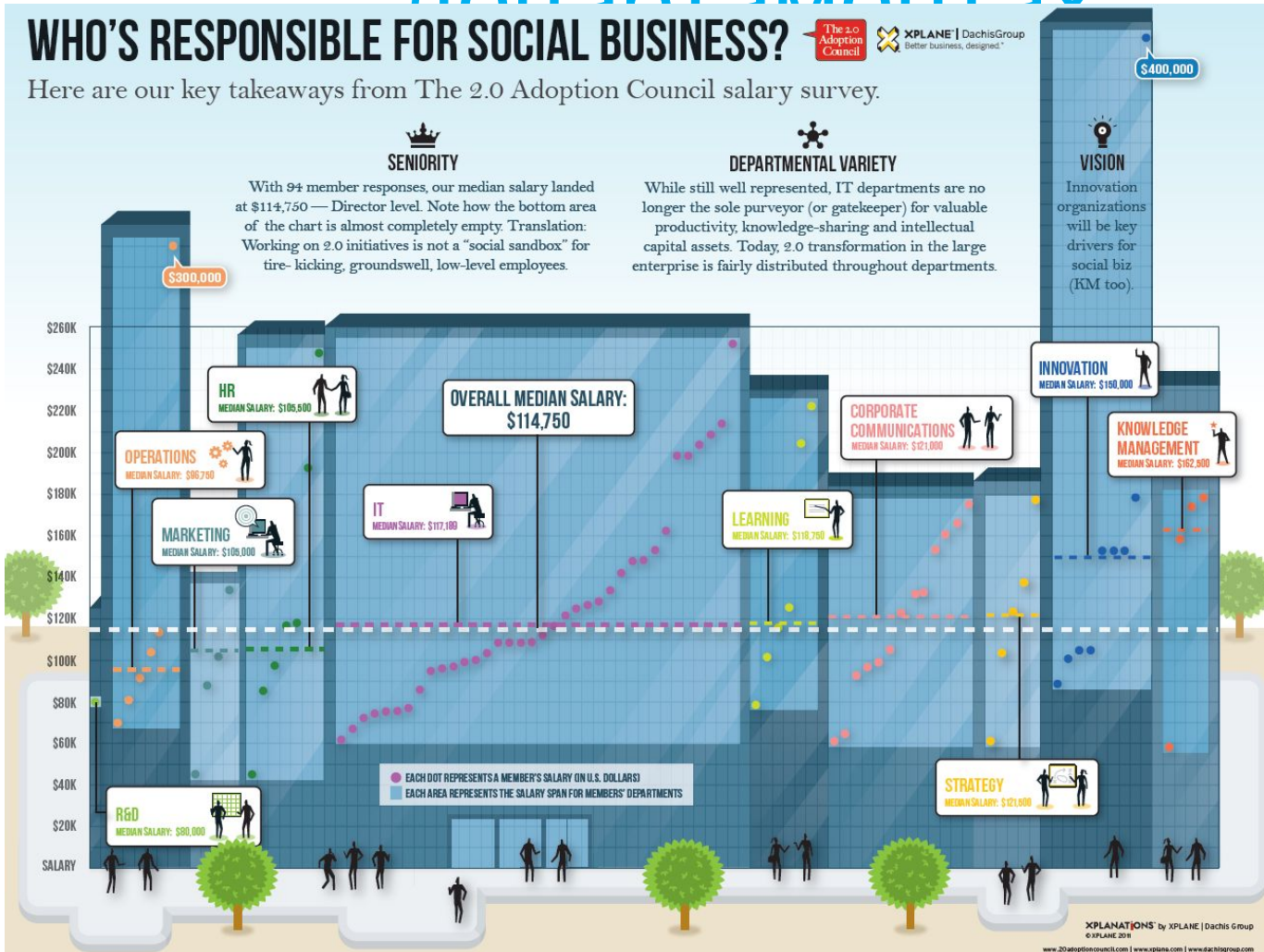
With 94 member responses, our median salary landed at \$114,750 — Director level. Note how the bottom area of the chart is almost completely empty. Translation: Working on 2.0 initiatives is not a “social sandbox” for tire-kicking, groundswell, low-level employees.

DEPARTMENTAL VARIETY

While still well represented, IT departments are no longer the sole purveyor (or gatekeeper) for valuable productivity, knowledge-sharing and intellectual capital assets. Today, 2.0 transformation in the large enterprise is fairly distributed throughout departments.

VISION

Innovation organizations will be key drivers for social biz (KM too).



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

В итоге получается примерно такой набор релевантных классов

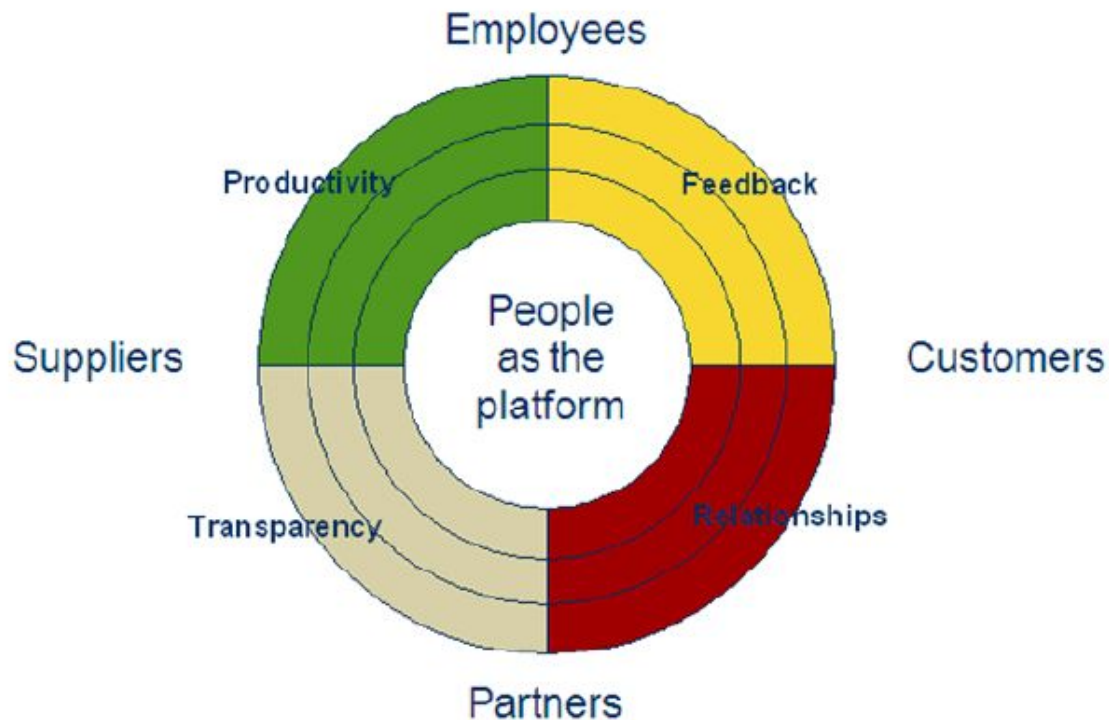
Social Business Impact (Technology Markets)



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



Получается примерно такой КОМПОЗИТНЫЙ рынок приложений

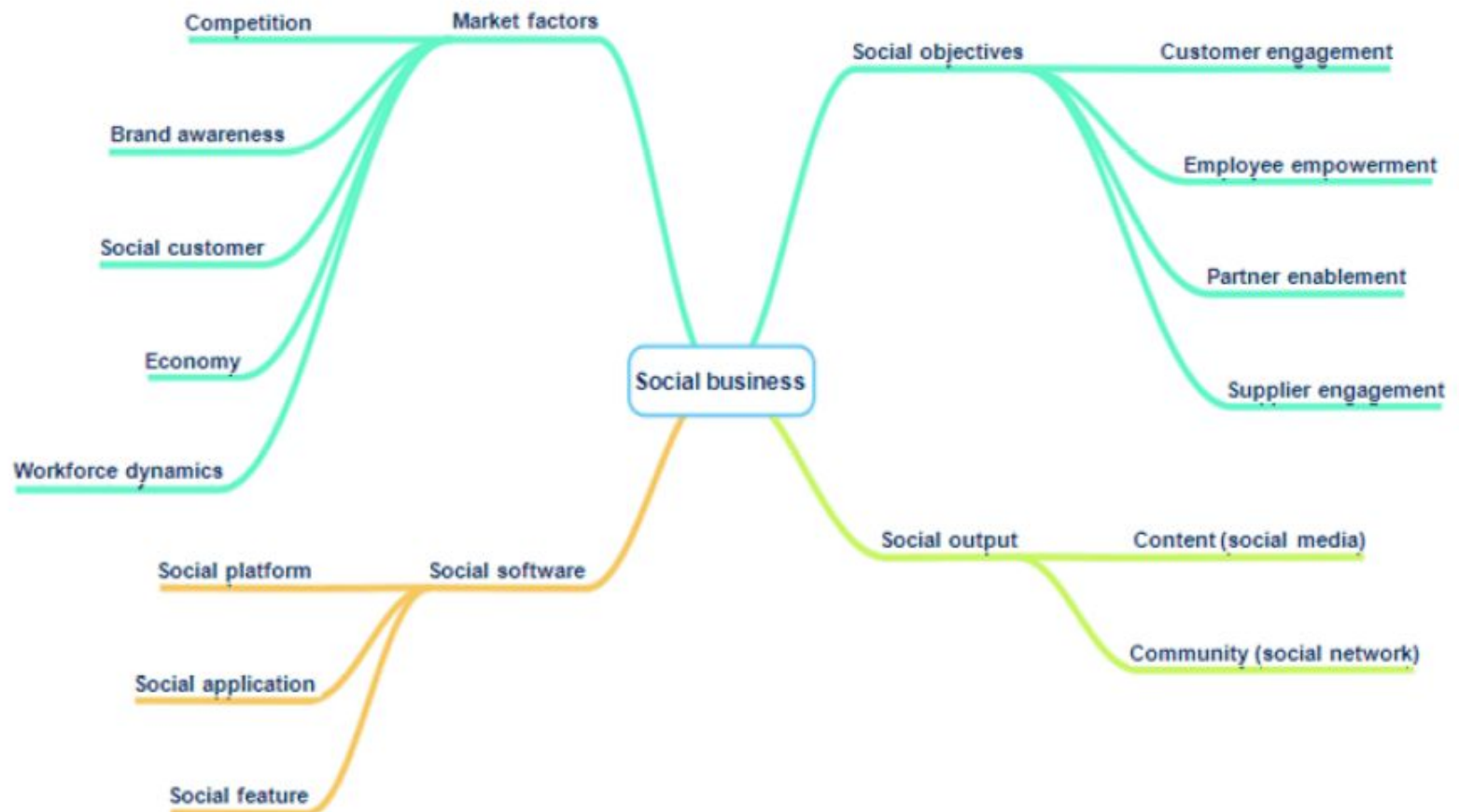
«People as the Platform»

The Social Business: Market Impact



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

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

Н.В.1 Названия сегментов – условные, поскольку они разные у разных аналитиков рынка: IDC, Gartner, Forrester ...

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

1. Cement 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:

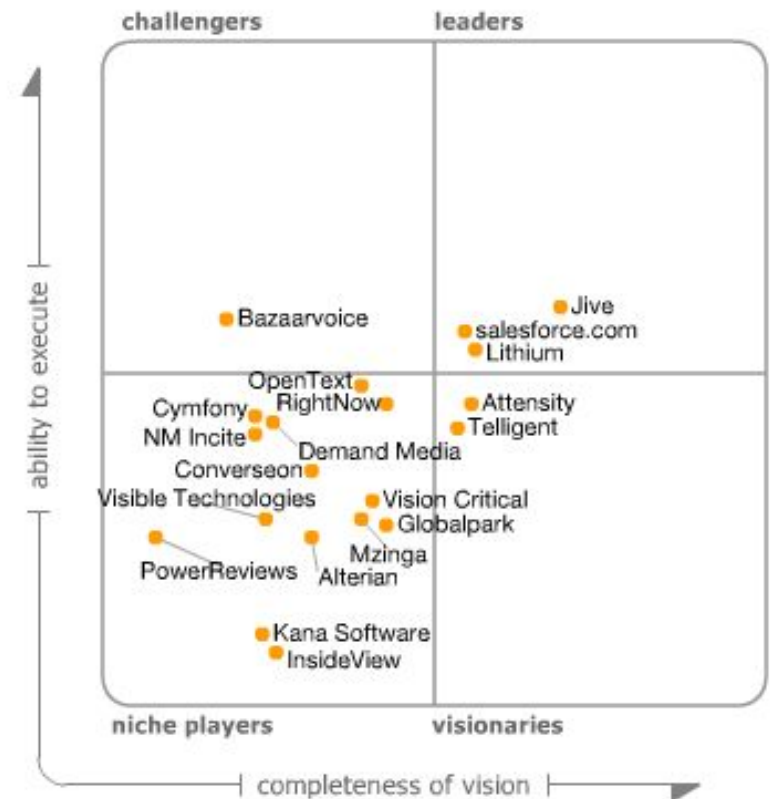
- Jive
- NewsGator
- salesforce.com

Product Life Cycle Management:

- Sopheon

2. Segment 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

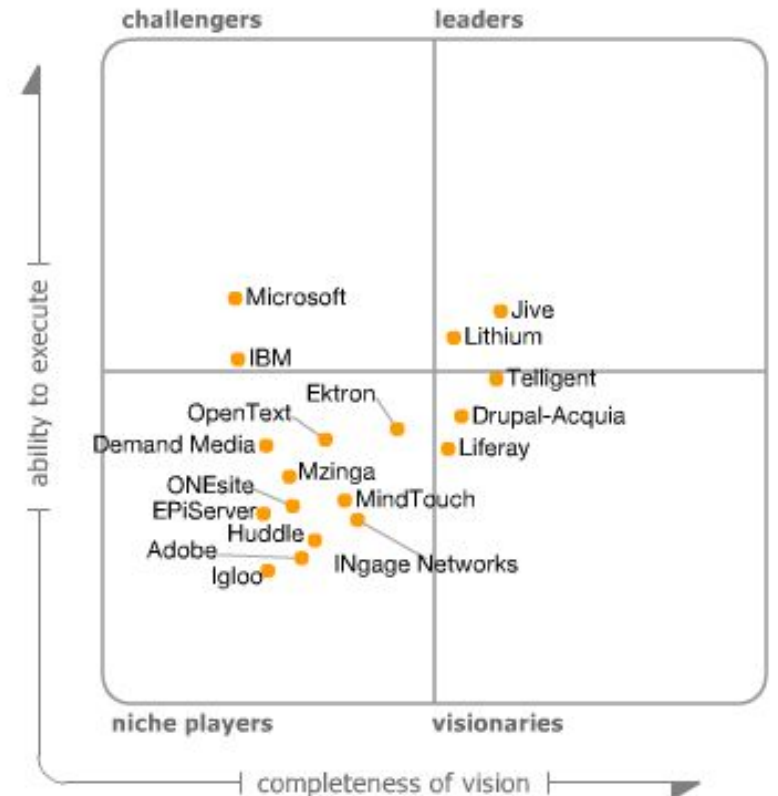


As of July 2011

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.

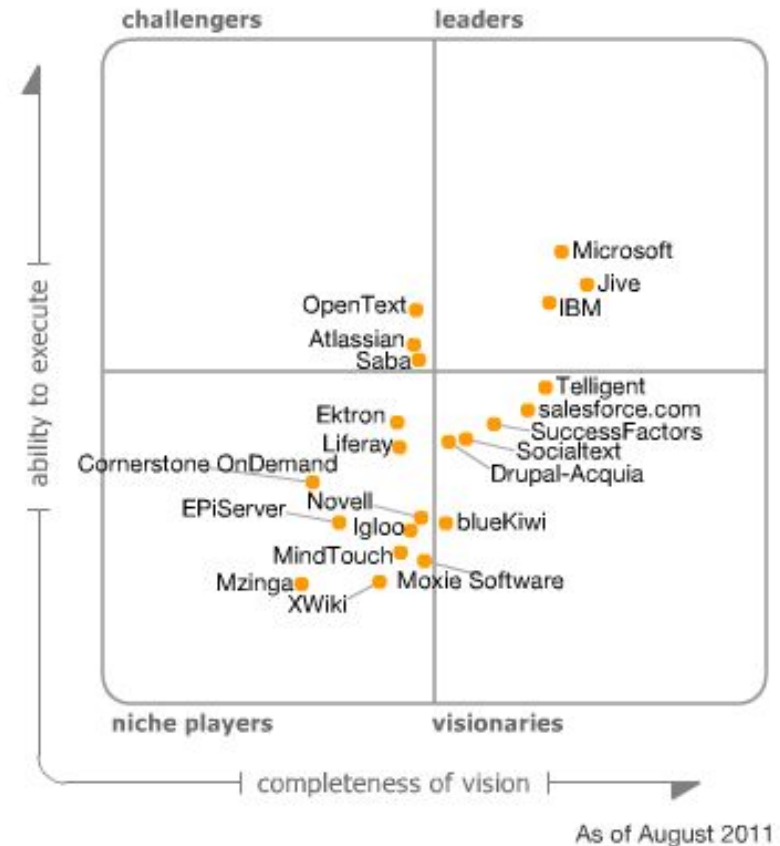


As of August 2011

4. Сегмент Social Software in the Workplace

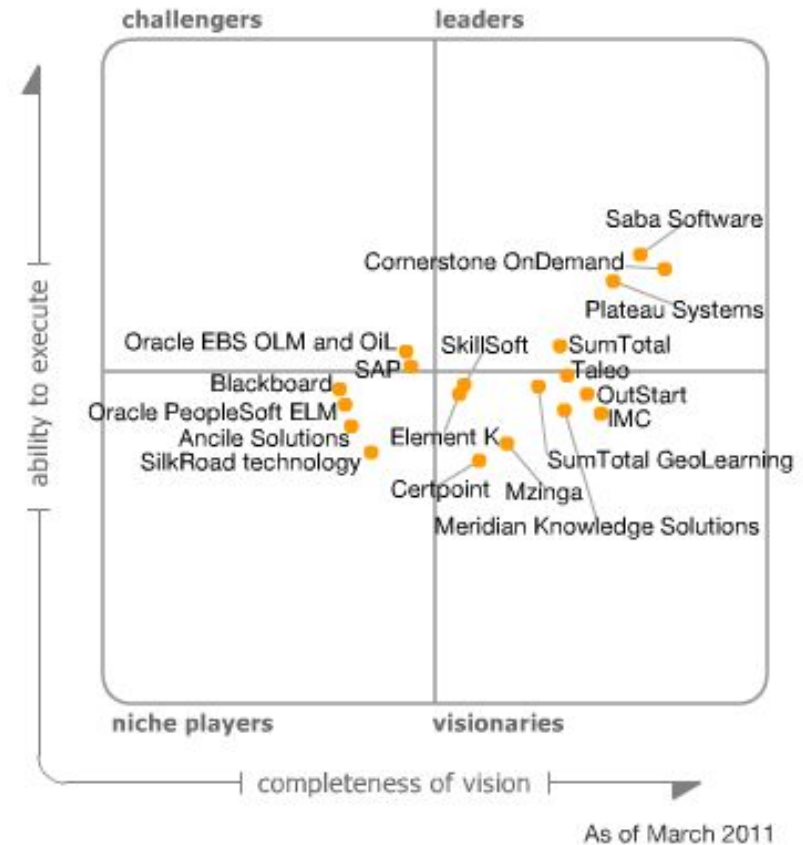
Magic Quadrant includes three kinds of vendors:

- **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



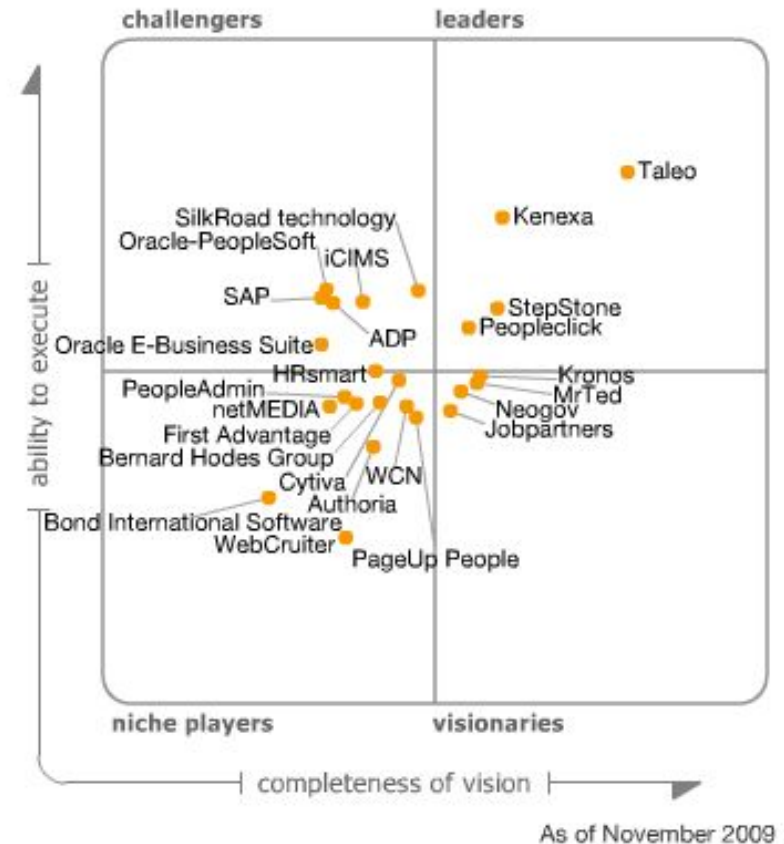
5. CERMENT Corporate Learning Systems

- 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



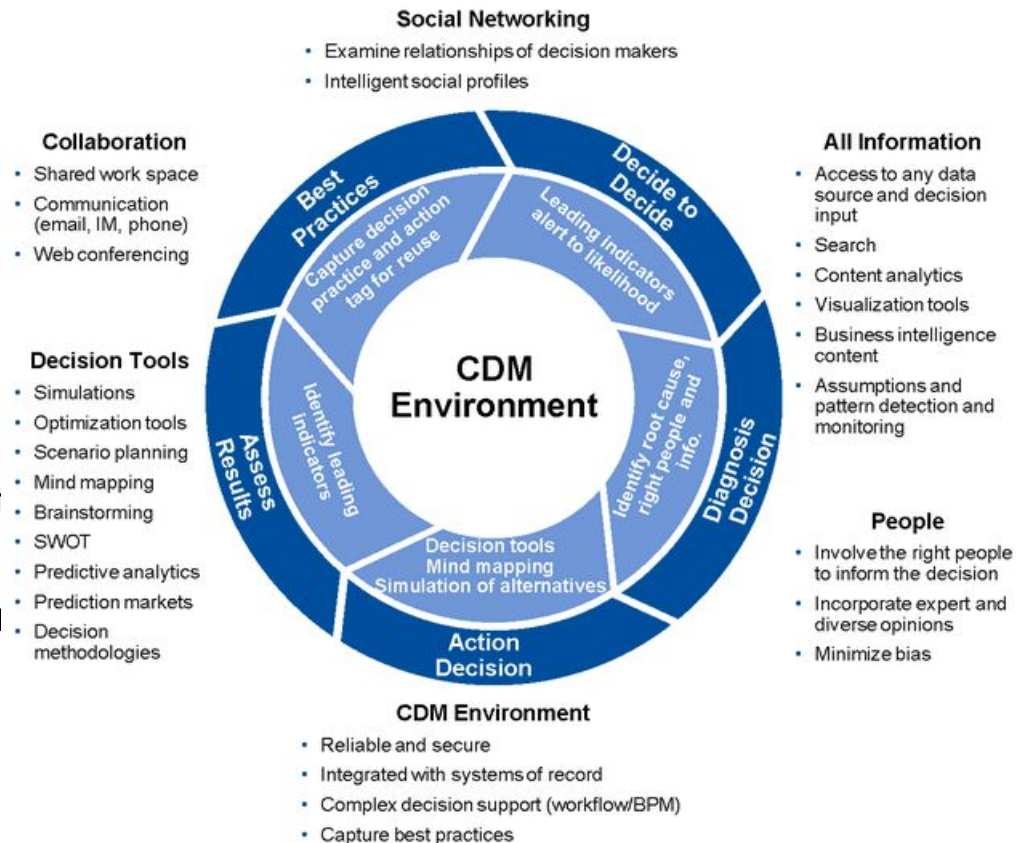
6. Сегмент E-Recruitment Software

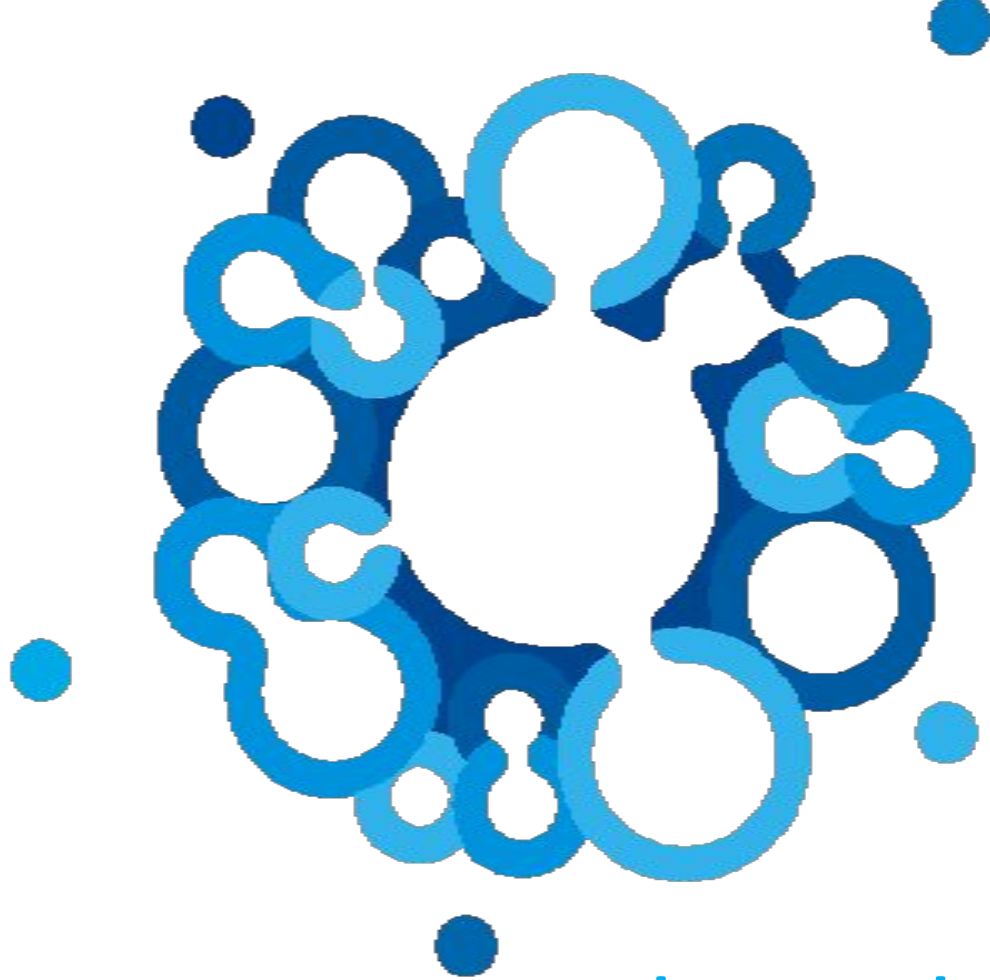
- HR leaders must look beyond formalized, internal processes and deploy techniques more commonly applied in marketing if they are to attract new employees from the collective and retain personnel they already employ
- In leading organizations, recruitment processes already exploit social software and 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



7. Сегмент Collaborative Decision Making

- 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
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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

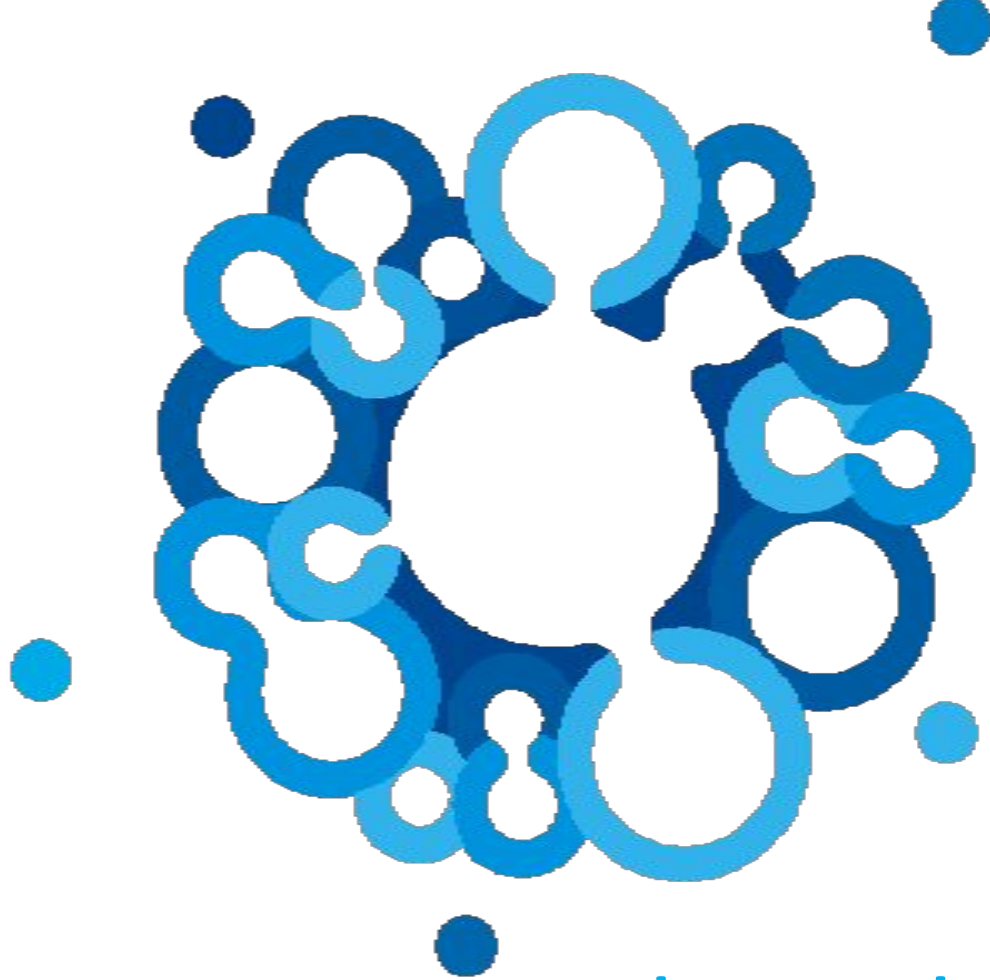
Для справки

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%

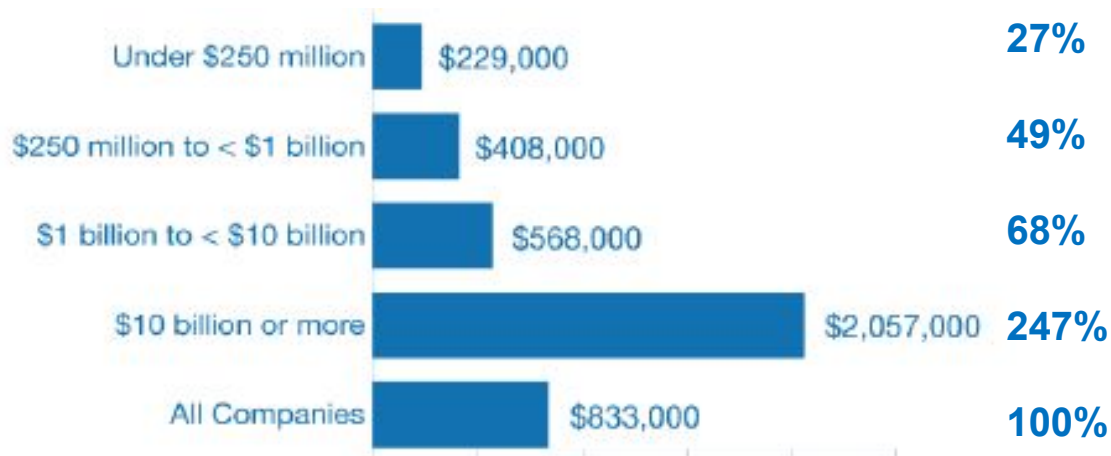
How Corporations Should Prioritize Social Business Budgets

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

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



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

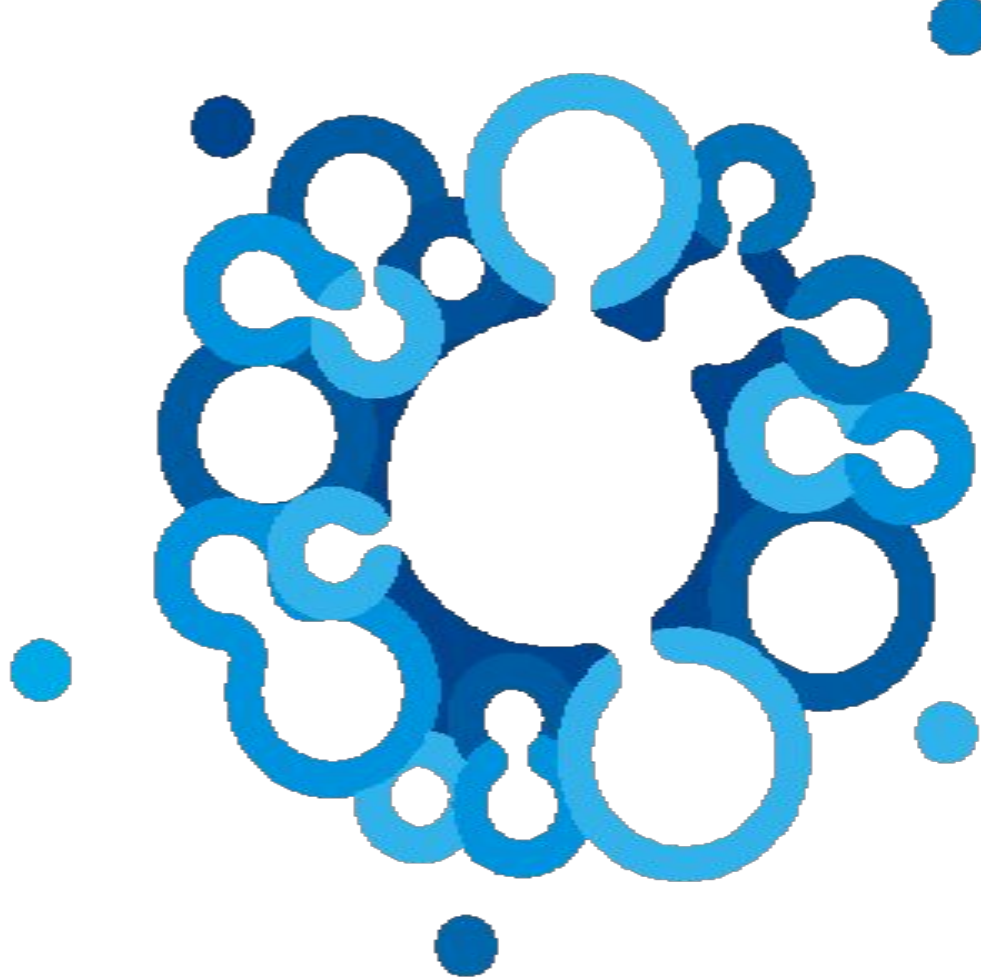
Внешние затраты компаний (в зависимости от их доходов) на SW для Social Business таковы

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 (компози́тный рынок People as the Platform)



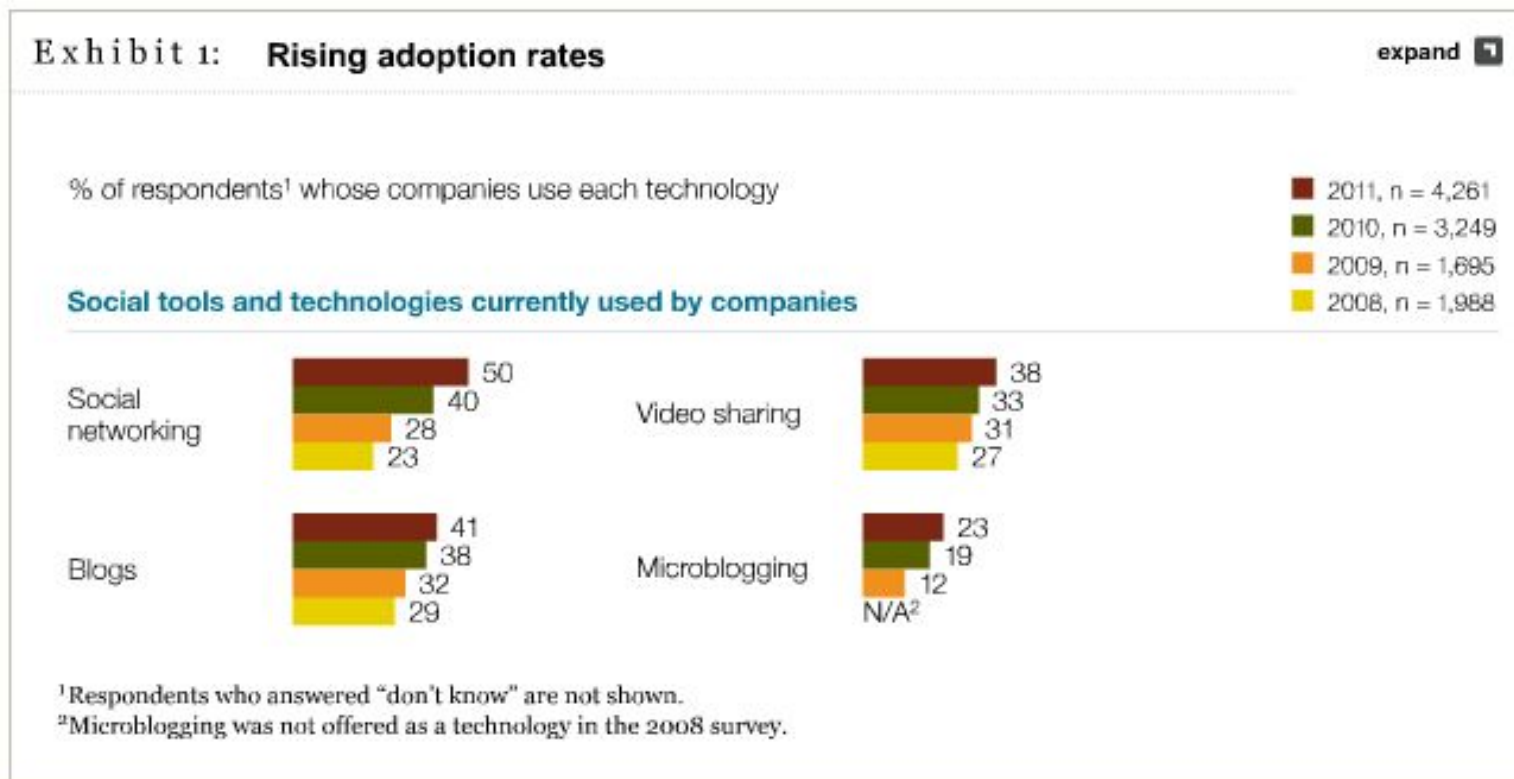
Прогноз динамики рынка

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

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

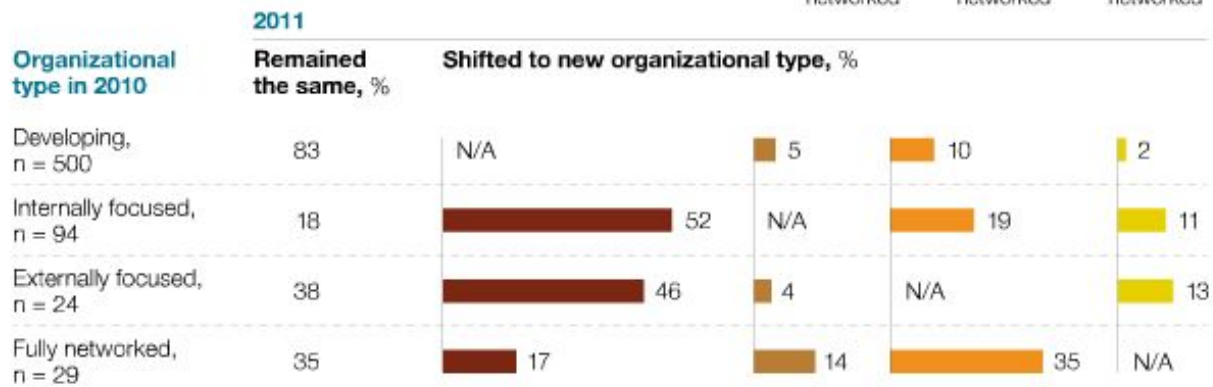
Exhibit 6: Shifting network classifications

expand

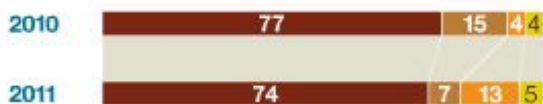
% of repeat respondents¹

Organizational type, based on social-technology benefits

■ Developing ■ Internally networked ■ Externally networked ■ Fully networked



Distribution of organizational types, n = 647



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



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