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The Forrester Wave™: Web Conferencing, Q2 2010

by Ted Schadler
for Information & Knowledge Management Professionals

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Adobe, Cisco, IBM, And Microsoft Lead In The Web Meeting Scenario

by Ted Schadler
with Matthew Brown and Sara Burnes

EXECUTIVE SUMMARY

In Forrester's 60-criteria evaluation of Web conferencing vendors, we found that traditional vendors Adobe, Cisco, IBM Sametime, and Microsoft's two offerings led the pack because of their breadth and focus on the Web meeting scenario that we evaluated. However, every product in our evaluation did well with meeting features. It was only in the strategy for collaboration and for Web meetings that vendors showed significant differences. This is not a surprise given the maturity of the market and the fact that conferencing encompasses so many different scenarios. AT&T, IBM LotusLive Meetings, and PGi are Strong Performers, and Citrix, Global Crossing, and InterCall are worthy Contenders.

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NOTES & RESOURCES

Forrester conducted product evaluations in February 2010 and interviewed 25 vendor and user companies: Adobe, AT&T, Cisco Systems, Citrix Online, Global Crossing, IBM, InterCall, Microsoft, and PGi.

Related Research Documents

"Harness The Power Of Workforce Personas"
December 9, 2009

"The State Of Workforce Technology Adoption: US Benchmark 2009"
October 7, 2009

"Web Conferencing 2009 Market Overview"
August 27, 2009

"Distributed Teams Need Real-Time Collaboration Tools"
September 4, 2008

WEB MEETINGS ARE AN IMPORTANT CONFERENCING SCENARIO

Web conferencing is a basic tool that covers many different meeting and conferencing scenarios, from a quick document review between two people to formal training and company meetings with tens of thousands of participants. In this evaluation we focus on Web meetings, defined by three scenarios (see Figure 1):

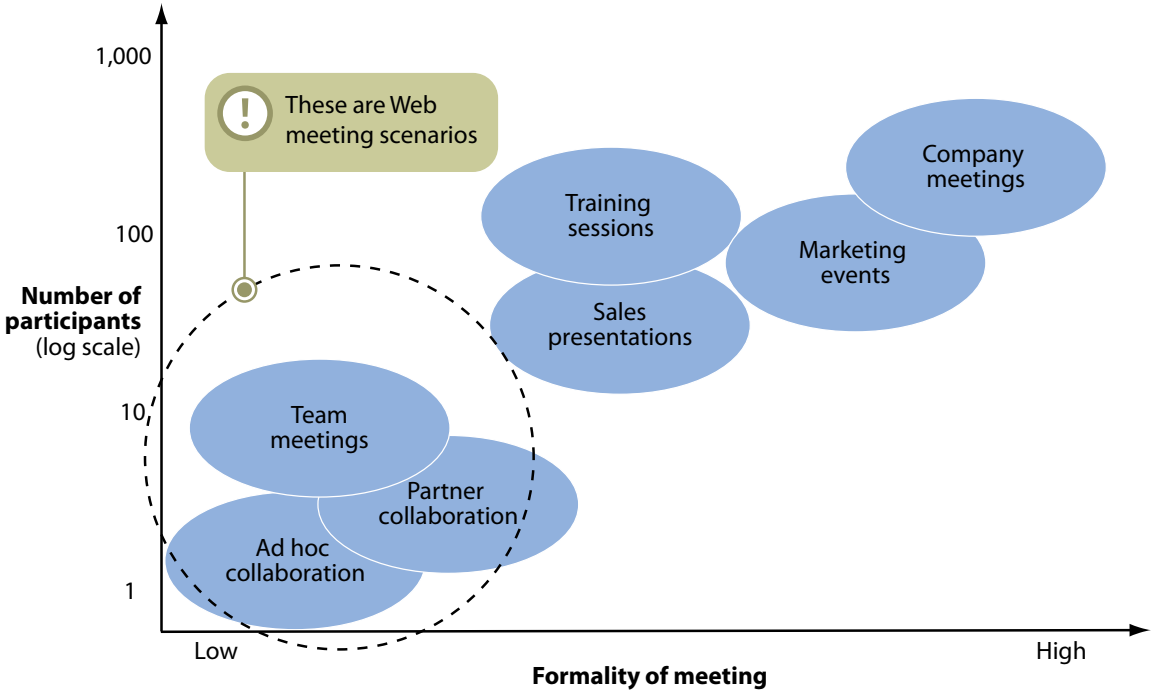
- **Ad hoc collaboration.** This is the most common and yet underserved opportunity for Web conferencing tools. How often do we just want to fire up a link between our computers (or between a smartphone and a computer) and look at the same document at the same time? According to our recent survey of information workers, fully 29% of us work on teams with members in different locations.[1] Web meeting tools must include features that make it easy to easily share an application or document among a small number of people. This scenario replaces email and requires click-to-conference capabilities such as are found in instant messaging tools and presence-enabled authoring tools.

- **Partner collaboration.** This is the same as ad hoc collaboration, except that it's an external scenario involving customers, suppliers, or partners. This is also an underserved scenario that would accelerate project work and break down barriers to collaboration among team members from different firms. In our survey, we found that 12% of information workers work on just such a multicompany team. Web conferencing tools must make it simple to easily and securely invite trusted partners to participate fully. This is harder to do with an on-premises solution, although certainly not impossible.

- **Team meetings.** The last big scenario for Web meetings is a permanent team meeting, a small group of people who are on to view a presentation or review the week's tasks. This team meeting scenario is served better with a tool that has good scheduling features, a simple but comprehensive user experience, and persistent meeting rooms so documents can be saved and shared after the meeting ends.

There are many other Web conferencing scenarios that we described in more detail in a previous report.[2] Forrester believes that one tool can't handle all scenarios equally well. We encourage you to pick a portfolio of suppliers to handle different scenarios. In this report we focus on Web meetings.

Figure 1 Web Meetings Are Only A Subset Of The Possible Scenarios



48064 Source: Forrester Research, Inc.

WEB CONFERENCING EVALUATION OVERVIEW

To assess the state of the Web conferencing market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of top Web conferencing vendors. Given the current market landscape, we included vendors from three adjacent markets: on-premises collaboration tools, audio- and Web conferencing service providers, and Web-native conferencing companies (see Figure 2). There are also vendors from learning management systems and some interesting startups and smaller vendors that we considered but did not evaluate. We also focused more on vendors with a strong North American presence.

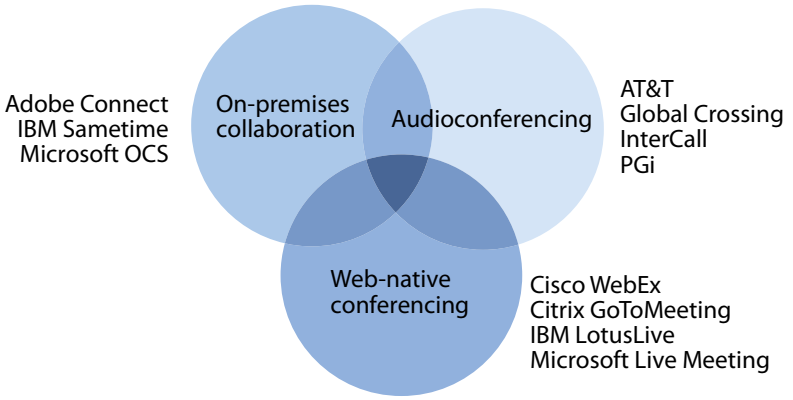
After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria. We evaluated vendors against more than 60 criteria, which we grouped into three high-level buckets:

- **Current offering.** To assess product strength, we evaluated each offering against eight groups of criteria: 1) device support; 2) meeting features; 3) deployment model; 4) audioconferencing; 5) management; 6) contractor or partner support; 7) guest participant support; and 8) user experience.

- **Strategy.** We reviewed each vendor's strategy, evaluating how well the vendor's planned enhancements will position it for market leadership in ad hoc collaboration, videoconferencing, collaboration portfolio, and pricing.

- **Market presence.** To determine a vendor's market presence, we evaluated each vendor's financial performance, installed base, integration partners, number of employees, and technology partners.

Figure 2 Vendors Converge On Web Meetings From Many Markets



Learning management systems

Elluminate
iLink
Saba Centra
Wimbra

Other Web meeting vendors

Dimdim
Fuze Meeting
LogMeIn Express
Netviewer
OpenACircle
RHUB

48064 Source: Forrester Research, Inc.

Vendor Scale And A Focus On Web Meetings Narrow The Field

Forrester included nine vendors and 11 products in the assessment: Adobe, AT&T, Cisco, Citrix, Global Crossing, IBM Sametime, IBM LotusLive, InterCall, Microsoft Live Meeting, Microsoft Office Communications Server, and PGi. Each of these vendors has (see Figure 3):

- **A product that targets the Web meeting scenario.** We examined more than 25 products before choosing the 11 that we evaluated. Top among our filters was a product with capabilities and a focus on Web meeting scenarios. Many of the products can also handle other scenarios, and many other products can handle the Web meeting scenarios. We chose the best of the best for the Web meeting scenarios.

- **Enterprise scale, at least $500 million in revenue.** Some interesting new entrants support Web meetings, including Dimdim, the vendor behind Novell's new Web conferencing product; RHUB, a Web conferencing appliance vendor; and LogMeIn Express, a new product from the remote help desk company. We looked only at the largest suppliers.

- **A critical mass of global customers.** We also chose only vendors with experience in the global market and years of experience selling to and servicing global accounts.

Figure 3 Evaluated Vendors: Product Information And Selection Criteria

Vendor	Product evaluated	Product version evaluated	Version release date
Adobe	Connect	7.5	November 2009
AT&T	Connect	8.8	2009
Cisco Systems	Cisco WebEx Meeting Center	WBS 27	April 2009
Citrix Online	GoToMeeting	4.5	February 2010
Global Crossing	Global Crossing Web Meeting	11	June 2010
IBM Lotus	LotusLive Meetings	V1R2	April 2010
IBM Lotus	Sametime	8.5	December 2009
InterCall	Unified Meeting	4.4.1.208	2009
Microsoft	Microsoft Office Communications Server	2007 R2	February 2009
Microsoft	Microsoft Office Live Meeting	2007	October 2007
PGi	Netspoke	4.8	October 2009

Vendor selection criteria
Does the vendor have annual revenue of over $500 million?
Does the solution support ad hoc, small team, and partner meetings?
Is the solution designed for enterprise customers?
Does the solution also cover other conferencing scenarios?

48064 Source: Forrester Research, Inc.

Keep Seven Factors In Mind When Evaluating Solutions

Web conferencing tools, particularly those focused on basic meetings, must serve the needs of a large percentage of your workforce. Our analysis and segmentation of the information workforce shows that fully half of the information workers in the US would benefit every day from better tools to hold basic Web meetings, and the other half would participate at least occasionally.[3] However, only 4% of US information workers use Web conferencing on a daily basis today. That means there's big room for improvement. In addition to all the usual criteria, keep these seven additional factors in mind:

1. **A high-quality user experience will mean more and happier users.** This sounds obvious, yet we've only come across one organization that had a user experience assessment team as part of its evaluation process. Vendors are investing in design and user experience, but a legacy of products designed by and for engineers persists.

2. **Make sure you can accurately bill the business for the tool.** A business manager just wants to make sure her employees are productive, and spending an extra dollar a week won't be a barrier to getting a better tool. On the other hand, that manager wants to know how much it will cost her this month and next year, so be sure you have cost predictability and good billing support.

3. **Support the smart devices that your employees demand.** This is a surprisingly popular and valuable feature, particularly for executives and other mobile professionals. The user experience can be surprisingly good, particularly on phones with larger or higher-quality screens. Having automated callback is an important support feature to consider for the mobile scenario.

4. **Integrate the meeting service into the rest of your collaboration platform.** One of the most common meetings is an ad hoc conversation about a document or an email. Be sure that your Web conferencing tool is easy for employees to launch from an email, a document repository, or a directory lookup. Worst case, be sure to provide a launch bar option.

5. **Look for a solution that also meets your audioconferencing needs.** No Web meeting is complete without an audioconference. The solutions vary widely on how they support audioconferencing — bundled into the service itself, integrated with another vendor's audio service, linked with your VoIP system, or all of the above.

6. **Offer videoconferencing if your infrastructure and situation warrants it.** While desktop videoconferencing support is a work in progress for conferencing vendors and quality varies widely, it is emerging as an important way to improve a meeting. If you have laptops with Webcams and a decent network, then make videoconferencing a factor in the selection.

7. **Consider the future of collaboration-enabled business processes.** People often meet to solve a problem. If your employees are involved in processes where decisions are required, be sure to select a solution with the programming interfaces you'll need to integrate conferencing into a loan approval process or an escalated customer service request.

ALL VENDORS HANDLE THE BASICS; STRATEGY SEPARATES THE WINNERS

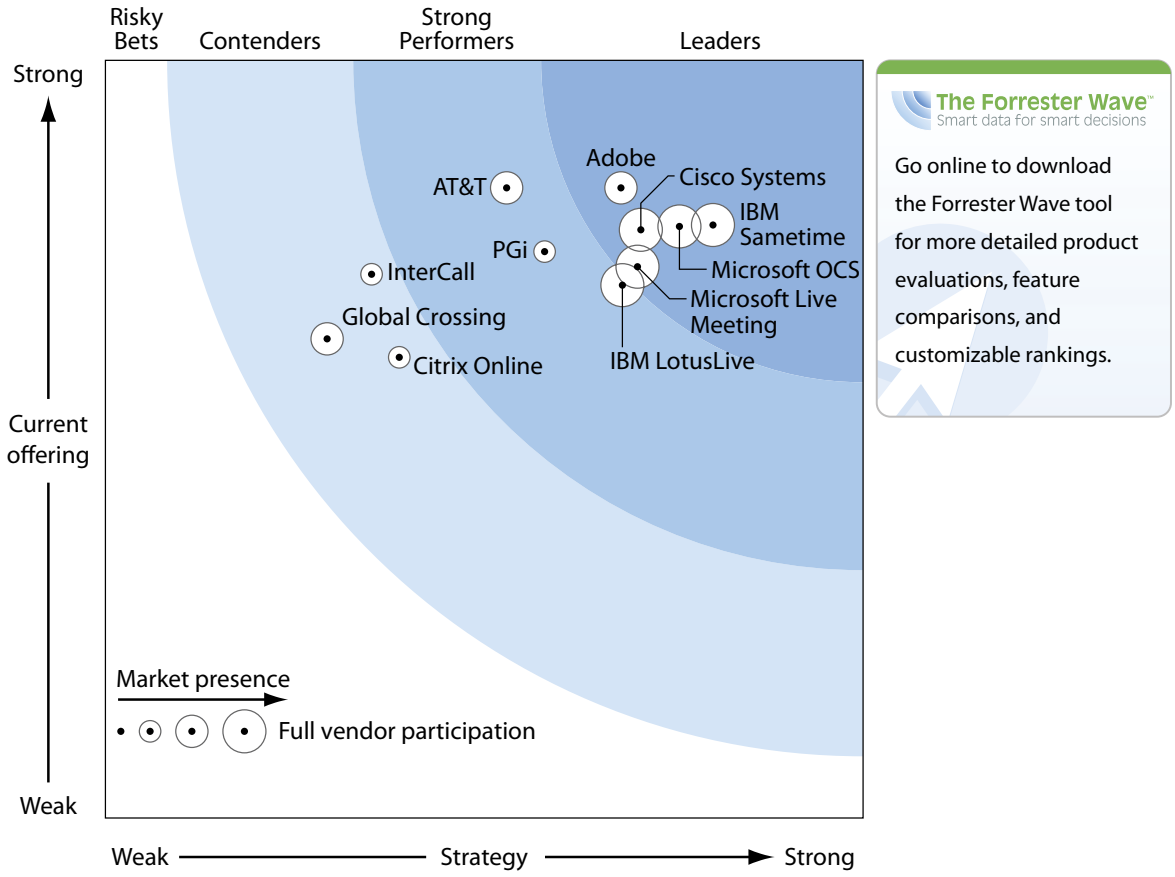
Let's face it: This is a mature market. Many of the vendors have had a product for a decade or more. This market maturity is evident in the parity with which most products scored on the current offering features. But because we are focusing on the Web meeting scenario, where user experience, videoconferencing, click-to-conference, and integration into a broader collaboration portfolio matter, we see real differences in the vendors' strategies. The evaluation uncovered a market in which (see Figure 4):

- **Traditional products from Adobe, Cisco, IBM, and Microsoft are Leaders.** Five products from four vendors are virtually indistinguishable in their scores. However, real differences separate these solutions in important ways. Cisco has the best hybrid and cloud solution; Adobe offers the best user experience; Microsoft OCS and IBM Sametime have great collaboration integration; and Microsoft Live Meeting benefits from its history and its recent adoption of the OCS client software.

- **AT&T, PGi, and new entrant IBM LotusLive are Strong Performers.** These solutions also offer solid features, although not quite the same strategic alignment with the ad hoc meeting scenario. AT&T has some interesting new hybrid deployment characteristics; PGi (in the middle of a major upgrade cycle) has strong cloud features and audio integration; and IBM LotusLive is getting big investment as part of IBM Lotus's cloud strategy.

- **InterCall, Global Crossing, and Citrix Online are Contenders.** All three of these solutions have solid meeting features and are utterly reliable as providers, but they lag in strategic alignment with the Web meeting scenario. For many companies and most situations, these cloud services will fit the bill.

Figure 4 Forrester Wave™: Web Conferencing, Q2 '10



Source: Forrester Research, Inc.

Figure 4 Forrester Wave™: Web Conferencing, Q2 '10 (Cont.)

	Forrester's Weighting	Adobe	AT&T	Cisco Systems	Citrix Online	Global Crossing	IBM LotusLive	IBM Sametime	InterCall	Microsoft Live Meeting	Microsoft OCS	PGi
CURRENT OFFERING	50%	4.15	4.17	3.89	3.05	3.17	3.53	3.91	3.59	3.63	3.91	3.74
Device support	10%	4.50	4.75	4.75	3.50	3.75	4.25	3.75	3.25	3.00	3.75	4.50
Meeting features	20%	4.85	3.90	4.10	4.05	4.00	4.00	4.25	4.40	4.10	4.10	4.40
Deployment model	15%	3.40	5.00	4.20	2.20	1.40	2.20	3.40	2.20	2.40	3.80	2.20
Audioconferencing	15%	3.70	4.20	4.20	2.70	2.70	3.40	3.90	3.70	3.70	4.10	4.10
Management	15%	3.75	3.45	3.20	2.40	2.60	3.45	3.55	3.50	3.20	3.20	3.05
Contractor or partner support	10%	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	4.00	5.00
Guest participant support	5%	4.00	4.00	1.00	1.00	5.00	3.00	4.00	3.00	5.00	5.00	5.00
User experience	10%	4.00	3.20	3.00	2.40	2.40	3.00	3.60	3.20	3.60	4.00	2.60
STRATEGY	50%	3.39	2.67	3.55	1.94	1.46	3.42	4.20	1.75	3.51	3.78	2.89
Ad hoc meeting features	35%	4.20	2.20	2.80	2.30	1.50	2.70	4.00	1.60	2.80	3.30	3.50
Other strategic characteristics	15%	3.80	3.00	3.80	2.20	1.20	2.80	3.80	2.60	3.20	3.80	3.40
Conferencing portfolio	15%	2.00	5.00	4.00	3.00	5.00	2.00	2.00	3.00	2.00	2.00	3.00
Collaboration portfolio	35%	3.00	2.00	4.00	1.00	0.00	5.00	5.00	1.00	5.00	5.00	2.00
Pricing	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
MARKET PRESENCE	0%	3.76	3.78	4.92	2.44	3.02	4.20	4.44	2.88	4.34	4.54	2.34
Customer base	40%	4.20	3.20	5.00	1.60	2.80	3.00	4.20	1.80	4.60	4.60	2.60
Company financials	40%	4.00	5.00	5.00	4.50	3.50	5.00	5.00	4.00	5.00	5.00	2.50
Technology partners	20%	2.40	2.50	4.60	0.00	2.50	5.00	3.80	2.80	2.50	3.50	1.50

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

Source: Forrester Research, Inc.

VENDOR PROFILES

We found no bad solutions among the products in this evaluation. All of the providers in this Forrester Wave report are worthy of your consideration, and which one you pick will have more to do with your collaboration strategy and deployment architecture than anything else. But remember that this evaluation and the quick summaries below are intended to be a starting point only. We encourage you to view the product evaluations in the Forrester Wave Excel-based vendor comparison tool. With this tool, you can prioritize the characteristics you care most about and create a custom evaluation. In this spreadsheet, you will find pricing information, a complete assessment of 60 different factors, and additional product details.

Leaders Have Strong Products And Strategies

- **Adobe Connect.** Adobe's product (which can be deployed on-premises or as a cloud service) runs on Flash, which means a low-hassle participant experience on computers and soon on some smartphones. This product is highly configurable, which means it can support complex learning and presentation scenarios. But it can be preconfigured to be simple and intuitive to support ad hoc meetings. One of its key features is persistent meeting rooms to make it easy to keep track of previous meeting materials and to launch a meeting with a simple URL.

- **Cisco WebEx Meeting Center.** WebEx is one of the original suppliers in the Web conferencing market, and it is now at the core of Cisco's cloud-based collaboration solutions. However, Cisco has also added some interesting integration with its on-premises audioconferencing and routing tools, so it can run in a hybrid mode where conferencing traffic can run on lower-cost internal networks. Cisco WebEx Meeting Center is just one of Cisco's conferencing tools, each of which supports a different scenario: learning, events, and help desk.

- **IBM Sametime.** Sametime got a big face-lift with the 8.5 release in 2009. This product includes instant messaging, presence, videoconferencing, and persistent meeting rooms, so it's easy to incorporate Web meetings into other modes of communication. The product runs on-premises, so it also easily handles the security requirements of regulated industries. However, to support the partner collaboration scenario, the servers must be positioned to let partners join the meeting.

- **Microsoft Live Meeting.** This hosted service is another of the original providers. Microsoft has reorganized this group into its Office business, which has a big benefit for Microsoft shops: It uses the same Windows client as the Office Communications Server. That makes it easier to augment the OCS solution with the Live Meeting solution to handle bigger scenarios. However, on its own, Live Meeting is Microsoft's cloud conferencing service and handles the Web meeting scenario well.

- **Microsoft Office Communications Server.** This is an on-premises solution that is well integrated into Microsoft's collaboration and productivity portfolio. That makes it a very strong candidate for the ad hoc meeting scenario. To handle partner collaboration, the servers have to allow visitors to access it. Federating your Microsoft tools with those of a partner allows employees to launch a Web meeting from a presence indicator showing a partner's availability.

Strong Performers Have Strong Products

- **AT&T Connect.** AT&T's product is primarily a cloud service that is tightly integrated with its audioconferencing service. But like Cisco, AT&T has recently added an on-premises solution that can bring conferencing traffic inside the firewall. AT&T also has offerings that can scale to 1,000 participants with the same tool set.

- **PGi.** This early entrant in audioconferencing has a solid product today that it is in the process of overhauling to take advantage of Web-native technology. Later this year, this strong service will get stronger. In the meantime, PGi offers a Java-based meeting tool that can handle the small group setting and also the larger conferencing scenarios.

- **IBM LotusLive Meetings.** IBM has made LotusLive its collaboration cloud service. LotusLive Meetings is the Web conferencing tool that can support small group meetings as well as larger event scenarios. IBM's approach is to price this competitively and also to fold it into the broader collaboration portfolio.

Contenders Have Solid Products, But Lag On Strategy

- **Citrix GoToMeeting.** Citrix is focused more on the SMB market than on the largest enterprises, but as most companies are comprised of smaller divisions, there are plenty of situations where this product is the right one. The company focuses on usability and eliminating complexity that interferes with participants' experiences. GoToMeeting is just one of Citrix's conferencing tools, each of which supports a different scenario: learning, events, and help desk.

- **Global Crossing.** Global Crossing Web Meeting is a cloud Web conferencing service with tight integration into its audioconferencing service. This service uses Flash where possible to make it easy for participants to join. While the service is targeted primarily at the sales presentation or marketing event scenarios, it can also handle the Web meeting scenarios. And as with other cloud services, it's well suited to partner collaboration.

- **InterCall.** InterCall's Unified Meeting is a cloud-hosted Web and audioconferencing service. As with other cloud-hosted service, the offering is targeted at sales presentation and marketing event scenarios. But it can easily support the internal and particularly the partner collaboration scenario. One attractive feature with this solution (and with other true services) is the ease of billing the service back to specific business cost centers.

SUPPLEMENTAL MATERIAL

Online Resource

The online version of Figure 4 is an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings.

Data Sources Used In This Forrester Wave

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

- **Product demos.** We asked vendors to conduct demonstrations of their product's functionality. We used findings from these product demos to validate details of each vendor's product capabilities.
- **Customer reference calls.** To validate product and vendor qualifications, Forrester also conducted reference calls with one to three of each vendor's current customers.

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] In April 2009, Forrester surveyed 2,001 US information workers at organizations with 100 or more employees to find out how they use technology in their jobs. Source: Workforce Technographics® US Benchmark Survey, Q2 2009. We created a graphical readout of our Workforce Technographics survey. This report covers devices, productivity, mobility, collaboration, intranet portals, and Web 2.0. See the October 9, 2009, "The State Of Workforce Technology Adoption: US Benchmark 2009" report.

[2] Web conferencing has become a key real-time collaboration priority for most enterprises. IT is working hard to pick the right suppliers, negotiate the right price, and drive adoption. But the market remains fragmented, pricing is often mysterious and hard to compare, and it's often hard to understand which suppliers are best suited to your key scenarios. To help, we have put together this market overview outlining the scenarios, presenting key facts on each supplier, and rationalizing the pricing models for easier comparison. The payoff will be lowering costs and choosing the right portfolio of suppliers to address your scenarios and to drive the adoption of Web conferencing beyond the one in four information workers who currently use it. See the August 27, 2009, "Web Conferencing 2009 Market Overview" report.

[3] In our analysis of how information workers use technology to get work done, two segments — mobile professionals and deskbound contributors — collaborate with small teams on a daily basis. These two segments comprising half of the information workforce would benefit from better Web meeting tools. The other two segments, offline practitioners and accidental iWorkers, would use these tools at least occasionally. However, none of these segments has fully adopted Web meeting tools yet. See the December 9, 2009, "Harness The Power Of Workforce Personas" report.

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Making Leaders Successful Every Day

Headquarters

Forrester Research, Inc.
400 Technology Square
Cambridge, MA 02139 USA
Tel: +1 617.613.6000
Fax: +1 617.613.5000
Email: forrester@forrester.com
Nasdaq symbol: FORR
www.forrester.com

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