Aragon Research

Topic: Collaboration

Issue: Who are the collaboration providers and how will they evolve?

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Telligent's Acquisition Of Zimbra Shows A Transition In The Enterprise Collaboration Market

Summary: *Telligent acquires Zimbra from VMWare to round out its unified social collaboration platform under the Zimbra brand.*

Event: On July 15, 2013, Telligent acquired the assets of Zimbra from VMWare. Financial details of the acquisition have not been disclosed.

Analysis

The acquisition of Zimbra will give Telligent an email platform, which competes primarily against Microsoft Exchange, Google's Gmail and IBM Notes/Domino. Zimbra's email, calendar and collaboration tools will join Telligent's enterprise social networks, online communities, and real-time tools such as IM and presence, audio and video chat. Telligent and Zimbra will now be subsumed under the Zimbra brand.

VMWare Exits The Collaboration Business

VMWare has been unloading its acquired collaboration services lately. It sold SlideRocket in March, and now Zimbra. The SocialCast social network is still left but may be up for sale soon in order for VMWare to focus on its core competencies such as the data center, hybrid cloud and end-user computing.

Zimbra's Enterprise Email Challenges

Zimbra has not gotten a lot of traction in the enterprise email market. While it had some success under VMWare, it was still behind Microsoft, Google and IBM in market share. The challenges in the enterprise market for an open source email system will not go away under Telligent. While Telligent may focus more on a unified social collaboration platform than VMWare did, competing against Microsoft and Google will be challenging.

Growing Integration of Social, Real-time Collaboration and Business Processes

Recently, social vendors like Telligent and Jive have been adding real-time and other collaboration features, while real-time and traditional collaboration vendors are adding social features such as Citrix with Podio, IBM with Connections and Microsoft with SharePoint and Yammer.

This has evolved even further with UCC vendors such as Siemens moving to a unified social collaboration platform with its Project Ansible initiative, combining real-time communications and UC with social collaboration and business processes (see Aragon First Cut 2013-FC7, Siemens Enterprise Communications Makes a Bold Move To People-Centric Collaboration With Project Ansible – But Others Are Following). Vendors are moving toward more people-centric collaboration where collaboration tools focus on people and how they work.

The Zimbra/Telligent offering will include email as a primary interface for surfacing social interactions such as activity streams. VMWare gave up on integrating Zimbra with SocialCast, and Telligent will need to overcome some challenges to be successful. But email gives Telligent a differentiator compared to other unified social collaboration vendors.

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- Zimbra and Telligent customers should demand the integration roadmap and decide what it will mean to their current investments.

- Telligent will have to be very transparent, and clearly message the business benefits of the integrated platform.

- Enterprises should not make strategic decisions on a Zimbra/Telligent offering until the integration is complete and full details have been revealed.

Bottom Line

The emerging trend of unified collaboration, which includes social, real-time and asynchronous collaboration in the context of business processes, will be a defining criterion to measure future collaboration platforms such as Zimbra/Telligent. Enterprise collaboration decisions should focus on supporting how people work, regardless of the technology tool.

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