

Cool Vendors in People-Centered Computing, 2013

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Cool Vendors providing people-centered computing ecosystems and capabilities aim to richly and efficiently support application development managers and software and Web designers who collaborate and go about their tasks as developers, knowledge or process workers, and end customers.

Key Findings

- Users in people-centered computing have developed a clear preference for their tools and applications to be provided as mobility first, with mobile access to cloud services and consistent operation and appearance across any device (tablets, smartphones, laptops, PCs, etc.).
- Mobile collaboration and social engagement are now corporate imperatives for people working on general administration, business-to-consumer (B2C) roles, specific tasks and project management. They expect a particular quality of experience (QOE) when they are mobile that is at a functional parity with fixed communications.
- While emerging, broad-scale pervasive technologies like HTML5 will eventually facilitate the consistent appearance and operation of applications across any device, Web Real-Time Communications (WebRTC), as a subset of HTML standards, can be expected to deliver any type of communication through a Web browser, and will be a major technology disrupter, because the traditional networking infrastructure and downloaded soft clients will become unnecessary.

Recommendations

- Make effective mobile experience the prime criterion when evaluating prospective collaboration and computing tools. All users' applications must be available on mobile devices, and preferably designed primarily for mobile use.

- Choose a suitable core mix of corporately mandated collaboration solutions, as well as a corporate app store of applications that is permitted and supported as casually used applications for project teams and knowledge workers.
- Conduct a proactive and ongoing environmental scan to evaluate and source emerging collaboration tools, technologies and resources that have a reasonable potential for facilitating the productivity or effectiveness of teams of people (small teams and cross-enterprise).

Analysis

This research does not constitute an exhaustive list of vendors in any given technology area, but rather is designed to highlight interesting, new and innovative vendors, products and services. Gartner disclaims all warranties, express or implied, with respect to this research, including any warranties of merchantability or fitness for a particular purpose.

What You Need to Know

The Cool Vendors in people-centered computing chosen for this year's report all contribute to easing and facilitating the way people intuitively work and collaborate.

Beanstalk provides a particularly supportive way for developers to distribute software. Bistri has a very complete suite of WebRTC solutions and tools for the emerging browser-based communication environment. Moprise extends SharePoint use into mobile applications in a highly intuitive way. Similarly, Neos has particular capabilities in the delivery of mobile cloud solutions.

Beanstalk

Philadelphia, Pennsylvania (www.beanstalkapp.com)

Analysis by Ray Valdes

Why Cool: In recent years, there has been a shift in the way many developers write software. Distributed version control (DVC) tools like Git and Mercurial have proved successful in open-source projects, and have resulted in a new kind of collaboration culture among developers, where it is assumed that projects can be broadly accessible, modified and enhanced in a manner that is agile, structured and managed. At the same time, there is an older generation of centralized tools, such as Apache Subversion, that is well-established. Beanstalk provides cloud-based applications and middleware that support software development processes in a distributed and collaborative manner across the most popular version control systems. Beanstalk also provides private hosting of Subversion, Git and Mercurial, each of which can be complex to setup and deploy if a development team were to undertake this on its own in private servers. Beanstalk provides a Web-based interface and enables smart-client access (for example, via iPhone and iPad clients). Although Beanstalk started four years ago as a Subversion hosting service, the scope has since expanded. As challenges around the software development process in recent years have escalated, and as the pace of change has increased, development teams are often geographically dispersed, security requirements more pronounced and user experience expectations raised. In response to these

needs, many organizations are moving to DVC systems (DVCSs), rather than traditional client-/server-centralized models, and are utilizing tools that feature integrated collaboration support. There is also a culture change occurring among developers — including independents, who in the past might have coded small projects without a safety net — who lack the practices and tools that enable teams to be effective. In the past, developers would function without DVCSs, because they were expensive, cumbersome and proprietary. Now most developers, no matter how fiercely independent, see value in using tools to manage the software development process even for small projects, because they see these tools as aiding projects to successfully scale and change the development world.

Initially, the culture change was led by online systems that hosted successful open-source projects. The most visible code repository is GitHub, which continues strong growth and is the dominant player in this category, though it initially was used primarily for public projects, not for private repositories. Similar cloud offerings are Atlassian Bitbucket, Google Code, CodePlex, Launchpad, Gitorious, Springloops and the venerable SourceForge.

In contrast to GitHub and the other vendors mentioned, Beanstalk does not focus on open-source public projects, but on private repositories. This is a growing subsector of private repositories, with many entrants now contending in this space, such as Assembla, XP-Dev.com, Unfuddle, ProjectLocker, CloudForge, Code Spaces, DevGuard, Atlassian Stash, RiouxSVN and others. There are plenty of good choices, and there is no clear leader.

Beanstalk is differentiated by a steadily expanding set of core functions, as well as by broad integration bridges to other related systems that its competitors, and especially open-source communities, do not have. In terms of core functionality, Beanstalk has added support for different repository types (Subversion, Git and Mercurial), modes of access (Web and mobile devices), tools to view different file types and a blame view that shows on a line-by-line basis which developers have made changes to a program and why. A key differentiator is that the Beanstalk system is not just a repository, but manages the deployment of applications to Amazon, Heroku and other servers via Secure Shell (SSH) and Secure FTP (SFTP). Beanstalk also provides integration with related applications, such as bug tracking (FogBugz, Lighthouse and Sifter), help desk (Zendesk), project management (Basecamp), billing and time tracking (Freckle and Harvest), and activity streams (HipChat).

The company behind Beanstalk is Wildbit, which also makes Postmark, a well-regarded tool for sending transactional emails.

Challenges: Beanstalk competes in a space that is highly dynamic. This sector was initially fragmented, but as it matures, the different vendors and offerings will converge and collide competitively. For example, companies that once focused only on open source now support private repositories. Others that only supported one type of repository (for example, Bitbucket supported Mercurial, Launchpad supported Bazaar and Beanstalk supported Subversion) are now supporting multiple repository types (especially Git). Vendors in related categories (such as bug tracking and project management) have now launched version control systems (FogBugz is now complemented by Kiln). Also, older offerings (SourceForge) that were once strong, but fell behind due to a lackluster user experience, have been freshened up and have renewed their competitive spirit. In

January 2013, Microsoft announced support for Git in its Team Foundation Server offering and in Visual Studio Integrated Development Environment (IDE).

The lower end of the market is becoming commoditized, which has diminished the traction of many former big players' products. Also, GitHub has received significant funding and has a burgeoning ecosystem, leaving scant room for contenders. One approach to offset this is to build a product family, as competitor Atlassian has done.

Who Should Care: Beanstalk should be of interest to application development (AD) managers, software developers, technical writers and Web designers who are part of distributed teams that need to manage the development and revision of assets such as source code or text.

Bistri

Paris, France (<https://bistri.com>)

Analysis by Geoff Johnson

Why Cool: Bistri, with its multiple modes of communication through a browser, is one of the best current examples of a WebRTC solution that provides multiple types of communication (videoconference, voice, chat, messaging, etc.) directly from a browser.

This eliminates the need for software client downloads (as with Skype and Google Voice) or other network infrastructure. Today, consumers and businesses can communicate agnostically between Mozilla Firefox and Google Chrome browsers using WebRTC and the new World Wide Web Consortium (W3C) peer-to-peer (P2P) communication standard ([WebRTC 1.0: Real-Time Communication Between Browsers](#)) and Internet Engineering Task Force (IETF; [Real-Time Communication in Web-Browsers](#)).

Numerous similar suppliers occupy related places in the emerging WebRTC ecosystem, but Bistri currently has one of the most complete WebRTC solution sets in this embryonic industry. Bistri's services provide an assembly of communication and collaboration solutions and tools, whereas most other early stage WebRTC developers only have single-point products. Bistri's most significant recent function has been to integrate the Chrome and Firefox browser delivery of WebRTC. Bistri is optimized for low bandwidth and, in addition to its obvious IM and social networking applications, provides notifications that can eventually be used to extend WebRTC functions into business processes.

Other WebRTC developers include [Acme Packet](#) in Bedford, Massachusetts, for session delivery in IP Multimedia Subsystems (IMSs); [Crocodile Rich Communications Suite](#) in Hampshire, the U.K., for rich communication services for communications service providers (CSPs); [Plantronics](#) in Santa Cruz, California, for headsets and business communication apps; [Priologic Software](#) in Victoria, British Columbia, for dedicated enterprise software; [PubNub](#) in San Francisco, California, for cloud real-time messaging; [TenHands](#) in Sunnyvale, California, for cloud video and IM; [Thrupoint](#), in New York, New York, for softphones; [TokBox](#) in San Francisco, California, OpenTok for video API; [Twilio](#) in San Francisco, California, for cloud communications for developers; [Unified Office](#) in Portsmouth, New Hampshire, for small or midsize business (SMB) unified communications (UC); [Vidtel](#) in

Sunnyvale, California, for cloud videoconferencing; [Voxeo](#) in Orlando, Florida, with Tropo to add voice and SMS to apps; and [Zingaya](#), a Russian startup in London, the U.K., and Palo Alto, California, for voice calling.

Challenges: Expect Microsoft not to remain passive in the battle for a sufficiently dominant role for Internet Explorer in WebRTC IETF standards development after having lost its proposal to include its CU-RTC API in the W3C vote. However, by 2014, virtually all browsers will likely be WebRTC-capable. This creates major opportunities for a new generation of CSPs to leverage WebRTC, and will force early WebRTC pioneers, such as Bistri and others, to remain agile as basic WebRTC tools become commoditized, and to work out new business models to embed their solutions. Monetizing the evolving WebRTC standard will be the clearest challenge. Expect Bistri and similar early stage WebRTC solution developers to move toward providing rapidly evolving toolkits for WebRTC integration with conventional enterprise websites as they work out new business models for their embedded solutions.

Who Should Care: Within the next two years, everyone using a Web browser can be expected to be offered some communication from within a Web page merely by clicking an icon. Who does not use some form of communication daily (especially a browser)? Few people. Thus, the market for Bistri and WebRTC usage is extremely diverse.

The universal method of obtaining and using communication will be changed by the wide adoption of WebRTC. Therefore, infrastructure manufacturers for telecom carriers and enterprises, all sorts of CSPs and any networked IT applications are likely to be impacted by consumer and business expectations that any type of communication will be routinely available from any browser. Thus, Bistri should be of interest to all these roles and users.

Moprise

Seattle, Washington (<http://moprise.com>)

Analysis by Song Chuang

Why Cool: For the many enterprises that use SharePoint extensively, the current level of mobile support is limited, especially for iOS and Android. Moprise and similar companies solve this problem and allow collaboration to be extended to the mobile channel.

Moprise provides mobile SharePoint solutions and was founded by ex-Microsoft execs. The namesake Moprise app allows users to access SharePoint and Office 365 documents on iOS devices (Android support is in the works), while the Coaxion app allows these teams to share documents and discuss them collaboratively. When the conversation is complete, all data is removed from all connected devices. Documents can be stored in SharePoint or Dropbox. Moprise is effectively like Flipboard for the enterprise.

Based on Gartner client inquiries, we have observed broad interest in mobilizing SharePoint and other collaborative solutions. Our clients have dismissed SharePoint's native mobile interface as inadequate and clunky to use. However, vendors like Moprise have improved usability, and have added important complementary functions that enable better collaboration.

Numerous vendors provide solutions in this area, including [Aircreek](#), [Formotus](#), [H3 Solutions](#), [AgreeYa Mobility](#) and [Infragistics](#).

However, Moprise's solution provides the most effective personal collaboration, and Windows Phone devices have SharePoint Workspace Mobile built in.

Challenges: Microsoft is building an improved mobile SharePoint experience with a design team four times larger than those working on previous releases. The new apps will include SharePoint Newsfeed and SkyDrive Pro, and are scheduled for Windows 8, Windows Phone and iOS in early 2013. Both apps were demoed at the SharePoint Conference 2012 in November, and a preview of SharePoint Newsfeed for Windows Phone is available at the [Windows Phone SharePoint Newsfeed](#). Gartner clients that need mobile SharePoint are advised to watch this space, as Microsoft is fundamentally in a stronger position to deliver a great mobile SharePoint experience.

Since many enterprises have SharePoint behind the enterprise firewall, mobile deployment will require VPN and/or enterprise Wi-Fi provisioning. In bring your own device (BYOD) scenarios where IT doesn't provide end users with such support, VPN setup and the use of Moprise may be a barrier to adoption. Another potential challenge is that SharePoint documents are processed in the Moprise cloud, which could be a problem for some enterprises due to regulatory compliance mandates.

Who Should Care: All enterprises that use SharePoint extensively should consider mobilizing now via Moprise or similar solutions instead of waiting for solutions beyond the next Microsoft release, both to extend collaboration to their mobile channels, and as part of broader plans that leverage collaboration to nurture innovation.

Neos

Milan, Italy (www.neosperience.com)

Analysis by Monica Basso

Why Cool: Neos offers a range of mobile cloud capabilities for organizations to engage end customers and deliver new user experiences through mobility, social, 3D virtual environments and augmented reality. Organizations can pursue the rapid innovation of marketing, sales and client approaches through the adoption of the latest mobile and social technologies, without the need to acquire specific skills or dedicate internal resources to mobile developments.

With the global proliferation of mobile devices, most organizations must consider mobile channels a top priority for success, particularly for customer-centric activities such as marketing, sales and customer support. Every organization with a large customer base needs to quickly build the capabilities to engage with customers through mobile devices, transforming the relationships and innovating the interactions. This is an extremely challenging task, particularly for organizations that do not have strong mobile competencies and experiences, a scenario complicated by the fact that the initiative owner often is marketing or the business units, not the IT organization. Strategizing and implementing B2C mobile capabilities imply a variety of objectives, devices, applications and systems to deal with, as well as consequent confusion, complexity and risks. Neos simplifies these

tasks, making it possible for smaller organizations and those less skilled in mobile technology to capture the new opportunities enabled by mobile and cloud technologies.

Neos is a cloud-based mobile application platform (per Gartner's description of the mobile AD platform [MADP] market; see "Magic Quadrant for Mobile Application Development Platforms") that enables organizations to rapidly deliver profiled applications and content to any device and channel (including social). Neos deploys context-aware, people-centric mobile applications enriched with augmented reality, 3D interaction and presentation, profiling and analytics for contextualization, and augments the end-customer experience in B2C scenarios.

With aggressive pricing per app per month, and taking advantage of cloud resources and delivery models, Neos aims to democratize the creation and delivery of B2C mobile apps on demand, enabling users to rapidly deploy them. Although Neos currently has offices only in its home country, this Italian-based company has a range of customers, including international organizations, such as Walt Disney. Neos won the Red Herring prize in 2012 for the top European mobile application provider.

Challenges: As the demand for cloud-based B2C mobile application offerings grows, and as organizations demand enhanced and rapidly deployed capabilities, other technology providers will launch similar offerings, and will increase competitive pressures for Neos. The company's limited international capabilities represent a major limitation to scale the business and to win against its rivals, especially with multinational organizations. The ongoing relocation of the company to the U.S. and the €5 million funding from founders, partner organizations in the U.S. and South America, and private investors should help Neos face this challenge and strengthen its international activities in the U.S.

Who Should Care: Organizations investigating B2C applications to modernize end-customer engagements should consider Neos for deployment. The company's approach and services enable rapid innovation with limited investments and deployment risks. Neos should also be of interest to application developers working on complementary collaboration, business intelligence (BI), location services and e-commerce products to expand into specific areas.

Recommended Reading

Some documents may not be available as part of your current Gartner subscription.

"Seven Steps to Enhance Enterprise Performance With a People-Centered Strategy"

"Predicts 2013: Success in Leveraging UC Will Be Easier With a Unified IT and Business Strategy for Collaboration"

"Extreme Collaboration: A Nexus-Enabled Operating Model to Enable Performance Breakthroughs"

"Hype Cycle for Unified Communications and Collaboration, 2012"

"Hype Cycle for Social Software, 2012"

Evidence

Gartner analysts have used multiple sources of public information to prepare these insights on people-centered computing Cool Vendors. The insights and views come from collaboration across several analytical disciplines and research communities within Gartner. This content has been validated by each vendor. The reasons why each vendor was chosen and why it is cool are explained in each section, and are validated using the reasoning in each section and in the Recommended Reading. Where appropriate, the definitions and classifications used in the report are given.

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