

IDC MarketScape

# IDC MarketScape: Worldwide Experience-Centric Intelligent Digital Workspaces 2024 Vendor Assessment

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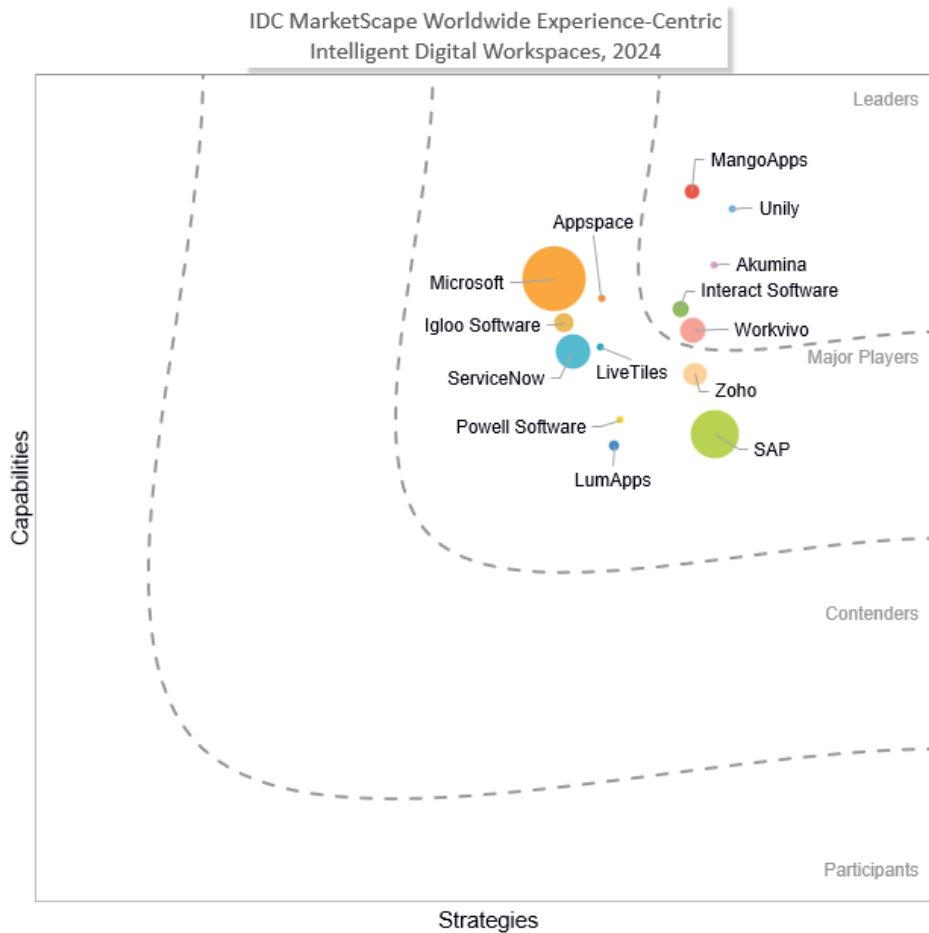
Holly Muscolino

THIS IDC MARKETSCAPE EXCERPT FEATURES MANGOAPPS

## IDC MARKETSCAPE FIGURE

FIGURE 1

### IDC MarketScape Worldwide Experience-Centric Intelligent Digital Workspaces Vendor Assessment



Source: IDC, 2024

Please see the Appendix for detailed methodology, market definition, and scoring criteria.

## IN THIS EXCERPT

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The content for this excerpt was taken directly from IDC MarketScape: Worldwide Experience-Centric Intelligent Digital Workspaces 2024 Vendor Assessment (Doc # US49741923). All or parts of the following sections are included in this excerpt: IDC Opinion, IDC MarketScape Vendor Inclusion Criteria, Essential Guidance, Vendor Summary Profile, Appendix and Learn More. Also included is Figure 1.

## IDC OPINION

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The digital work environment has gone through multiple changes in the past two years. With the mandate for remote work and the ability to support both "desked" and "deskless" (including the frontline) workers, organizations had to retire their aging employee intranets in favor of a modern experience-centric platform that could accommodate secure remote access to a variety of internal applications and data sources. Then generative AI (GenAI) came on the scene, and digital transformation initiatives took on a new imperative to improve employee productivity and team collaboration when creating content and communications or searching and finding knowledge across the enterprise.

The disruption to the work environment and information technology's (IT's) pivot to cloud-based applications brought with it an opportunity for organizations to consider new solutions that mimic the ease of use and personalization of consumer apps in a business context. Some organizations have already made the switch to emerging employee experience applications as part of early projects sponsored by corporate communications or human resources (HR) teams. In 2021, IDC published the *Intelligent Digital Workspace Vendor Landscape* (IDC #US48721522, September 2022) document that included a mix of experience-centric and device-centric vendors that crossed multiple markets with the goal to connect people, apps, and data systems. In particular, it highlighted the employee's ability to create the employee's own workspaces as well as external workspaces for customers, partners, and suppliers.

This IDC MarketScape focuses on software platforms that can be used to develop and administer experience-centric intelligent digital workspaces (IDWs) that serve both desked and deskless workers across office and frontline environments. This new concept blends the capabilities of the experience-centric intelligent digital workspace with some of the capabilities seen in an authenticated content management solution. The companies evaluated in this document are delivering employee-centric IDW platforms that go beyond the intranet-in-a-box packaged solution colloquially referred to as a *modern intranet*, *employee experience*, or *employee engagement platform*. The defined leaders of this market will have strengths in capabilities that serve the full spectrum of employee segments with an emphasis on experience, intelligence, and digital capabilities, as well as the strategy and growth in delivering personalized workspaces for both internal and external users. In essence, these solutions provide a better work environment that leads to improved operations and employee and customer satisfaction.

## Experience-Centric Intelligent Digital Workplace Considerations

IDC research found that organizations deploying an intelligent digital workspace saw an increase in employee productivity (40%), greater operational efficiency (40%), improved customer experience (34%), and improved employee experience (31%). With these business benefits in mind, this IDC MarketScape evaluated how well experience-centric IDW applications include design elements that allow the end user to configure their workspace interface to exactly match their learning, processing, and cognitive style. From an administrative perspective, it should support a library of natively connected applications and the ability to custom connect via APIs with other applications in the organization. These connected apps should include permissions and security setup that matches the organizations' policies. The end-user interface should have an easy way for both desked and deskless workers to interact with people and tasks, as well as a means to select or drag the app or module they want from the library and connect it to their workspace. From a design perspective, users should be able to configure their own workspace layout, colors, fonts, and other accessibility features via design themes, templates, or interactive toggles.

More advanced experience-centric IDW systems will support automated recommendations of new apps the user can connect with based on work tasks, other application workflows, or IT global requirements. The software should also support a variety of native productivity reports and system analytics for business leaders to gather insight into the experience ROI. IDC research found that the modern intranet or employee engagement platforms fall into one of multiple categories: those that focus on *communicating* news from corporate communications or HR teams with a social community, rewards, and engagement advantage; those that are more *process driven* making the creation of content, assets, and documents easier to manage; and those that are *business role oriented* for project management in which application, data, and knowledge management are key.

Each of these workspace types has matured with API support, visual interface design tools, and security models modified to meet the needs of a hybrid work environment that caters to both desked and deskless workers. The introduction of more experience-centric solutions elevated the communication and social aspects of the work environment. However, with artificial intelligence (AI) and GenAI entering the scene, the demand for easier work tasks and better recommendations elevated the work environment. Augmenting the work experience with intelligence tools is at the foundation of an intelligent digital workspace. IDC research found the most important end-user augmentation technologies of an intelligent digital workspace include team collaboration tools (45%), automated workflow management (41%), task automation (40%), and an end-user configurable user interface (UI) framework (37%). Experience-centric IDW applications include the ability to:

- Promote employee engagement within configurable workspaces.
- Provide single sign-on authentication to secure the privacy of information and data stored within enterprise repositories as a result of a single-user interface access point.
- Eliminate context switching by providing access to all required resources integrated across the organization and delivered to a "single pane of glass."
- Allow business users to configure their own dashboard of apps and control the design theme and accessibility requirements.
- Provide employee experience analytics that reveal specific, actionable insights to improve the experience design and assist the employee in the performance of their duties.
- Promote team collaboration using connected social and work channels with interaction or action status (e.g., badges, status indicators, and reminders).

- Provide easier authentication and compliance with security protocols.
- Support remote access with IT oversight to device usage.
- Connect isolated functions from different applications into a workflow and expose to the user-level interface.
- Locate digital assets across multiple internal and external repositories in one federated view.
- Be able to proactively recommend relevant content to the user.

## IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

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The vendor inclusion list for this document was designed to accurately depict the vendors that are most representative of an experience-centric intelligent digital workspace buyer's selection list. IDC defines an intelligent digital workspace as an ecosystem of products coordinated into a unified end-user productivity experience by design, engineering, and/or artificial intelligence. It provides a personalized and federated view of the resources that a worker requires to get their jobs done and secure access to those resources, including subject matter experts and other collaborators as well as applications and data, from anywhere via any device. An experience-centric IDW focuses on the presentation, management, and organization of the user's work activities, as well as enterprise and employee communications. Vendors were surveyed and further investigated to ensure that the offerings qualified with both capabilities and strategies related to the experience-centric IDW market.

Critical to this research effort was for the vendor to meet the inclusion criteria. Any vendor participating in this IDC MarketScape had to showcase that it met the following:

- Minimum of 250 active customers (corporate entities)
- Global presence, operating in Europe, North America, and the Asia/Pacific regions
- Deployed in the cloud as managed hosted private cloud or platform as a service (PaaS)/software as a service (SaaS) in a public cloud with clients in cloud production for at least 12 months
- Market presence and momentum based on IDC inquiry and positive revenue growth
- Generates revenue of \$10 million in annual software revenue (excluding professional services) in calendar year 2022 from a commercially supported business packaged offering
- Targets and scales to meet the needs of organizations supporting 500+ employees with approximately 50% of customers in this range
- Provides for the following capabilities:
  - Creation, curation, and ingestion of content that can be assembled, processed, and approved for intranets, mobile apps, social media platforms, news feeds, and other channels or devices
  - Personalization of the user experience (UX) for desked or deskless workers
  - Content repository that provides library services to organize and maintain various content types and their metadata
  - Security, roles, and permissions management
  - Analytics and reporting at the infrastructure, content, and user experience layers with data export and trends analysis
  - Interoperability with adjacent technologies via well-documented web services, open APIs, or SDKs

- Provides partner community (e.g., with training, products, campaigns)
- Supports regulatory, compliance, and governance laws, policies, or guidelines

## ADVICE FOR TECHNOLOGY BUYERS

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As business models shift to accommodate AI-enabled work and interoperability between systems that were not necessarily connected before, the experience-centric IDW is well suited to meet these technical requirements. Employee experience applications will add a level of personalization above the standard user interface to deliver the employee's desire for a consumerlike experience working with multiple applications, activities, and data. Business users should be able to connect application services, define user roles and tasks, and take advantage of the scale of the cloud to link and work within embedded enterprise applications.

For buyers seeking an experience-centric IDW, the vendor should provide ease-of-installation services and support to get you up and running quickly and continue to monitor your progress to success. Buyers should determine whether they need more of a news and community site or business process focus. The need to deliver more GenAI capabilities will demand more of the experience-centric IDW applications in the coming years. IDC advises technology buyers to look for the following when selecting a vendor:

- A flexible architecture to support reusable atomic content blocks or widgets, roles-based templates, and an authoring environment that makes it easy to create and publish content to multiple channels
- A strong representation of organizations that have deployed high-traffic employee workspaces, and possibly customer workspaces, preferably in the cloud
- Intuitive user interface for all users who interact with the application (e.g., HR, finance, marketing, sales, customer support, suppliers, and partners)
- A modern, API-based architecture to ensure performance and ease of integration
- An innovation strategy with support for GenAI, conversational interfaces, personalized content, knowledge management, and intelligent search
- Innovation track record and a demonstrated ability to deliver enhancements on a bimonthly cadence in a seamless manner, including automatic and frequent updates
- Supported connectors to adjacent applications such as an ITSM, HR applications, or collaboration tools to minimize custom code required
- Activity-specific solutions and templates that offer easy deployment and configuration such as onboarding, town hall news, or board of director dashboards
- Global multisite management with support for multiple languages, local points of presence or datacenters, and adherence to regulatory guidelines
- Financial stability and ability to support future solutions as user expectations evolve
- A strong partner and developer ecosystem for implementation, support, and technology integrations

## VENDOR SUMMARY PROFILES

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This section briefly explains IDC's key observations resulting in a vendor's position in this IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

### MangoApps

After a thorough evaluation of MangoApps' strategies and capabilities, IDC has positioned the company in the Leaders category within this 2024 IDC MarketScape of worldwide experience-centric intelligent digital workspaces.

MangoApps was established in 2008 and is headquartered in Issaquah, Washington, United States. MangoApps is a private company with an experience-centric intelligent digital workspace product under the name of MangoApps.

Quick facts about MangoApps include:

- **Employees:** <250
- **Top 5 industries:** Healthcare, retail, manufacturing, finance, field services
- **Key markets:** Lower midmarket, upper midmarket, enterprise
- **Cloud type:** SaaS
- **Cloud security:** ISO 27001, SOC 1, SOC 2, FedRAMP, CSA STAR, German C5X, HITRUST, GDPR
- **Integration options:** No/low code, scripting, APIs, native connectors, microapps
- **Pricing model:** Subscription, usage based, license fee, value based
- **Top 5 integrated apps:** Microsoft, Google, Workday, ADP, Kronos
- **Interesting fact:** MangoApps has been used by clients as a secure unified digital work hub integrated to 200+ enterprise systems allowing them to sunset other costly tools. Another MangoApps client saw very high monthly employee adoption when they switched from a static website to a customizable and dynamic modern intranet with a single space for employees to view current information and resources. MangoApps is a 100% employee-owned company.

### Strengths

- **Content and personalization:** MangoApps offers content authors a block editor to manage branded microsites with templates for easier content generation and workstreams. MangoApps also supports frontline workers with a mobile app and interactive forms for employees without a company email and accessibility for all. Generative and general AI capabilities are throughout the system for information access, writing assistance (with source notation), accessibility, personalization and recommendations, compliance, and security.
- **Data and architecture:** MangoApps has a large set of native SaaS integrations to enterprise applications with bidirectional updates. Clients can create their own microapps and widgets with API webhooks. MangoApps supports CSS development for color, branding, navigation, or custom delivery options.
- **Workspaces:** MangoApps supports employee engagement with recognition aligned to company core values, a rewards store, and in-context polls. Workflow generation has an

intuitive rules generator. The mobile app mimics the desktop webpage for individualized widgets and administrative mandatory company news, messages, and tasks dashboard.

## Challenges

- **Market awareness:** MangoApps is one of the smaller vendors in this evaluation and has limited market awareness. Despite MangoApps making significant progress in customer growth, it still lacks a substantial number of resell, technology, or agency partners to leverage for expanding its market presence.
- **Analytics:** Client organizations we interviewed noted that MangoApps has room for improvement regarding analytics and reporting of user engagement, content usage, and application status. MangoApps provides a fair number of reports out of the box, but the depth of visualization and comparison is not available.
- **Ease of use:** Client organizations we interviewed noted that MangoApps has room for improvement regarding the simplicity to publish content, seeking more consumerlike social media posting platforms.

## Consider MangoApps When

Consider MangoApps if you are a midsize to large enterprise with both desk and deskless workers who need access to multiple apps integrated into a single company-branded AI-enabled digital workspace.

## APPENDIX

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### Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in this IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed. For this IDC MarketScape, vendor size was determined by IDC's 2022 Software Tracker and validated by each vendor on its revenue in the market. For details regarding the vendors and size of the website market for which these vendors are included, see *Worldwide Website Software Market Shares, 2022: Demand Slows Despite Hybrid Headless CMSs Entering the Market* (IDC #US51147623, August 2023).

### IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and

interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

## Market Definition

IDC defines an intelligent digital workspace (IDW) as an ecosystem of products coordinated into a unified end-user productivity experience by design, engineering, and/or artificial intelligence. It provides a personalized and federated view of the resources that a worker requires to get their jobs done, and secure access to those resources, including subject matter experts and other collaborators as well as applications and data, from anywhere via any device. The intelligent digital workspace is also fully observable by IT and security operations professionals. The IDW can be one of two types:

- **Device centric** – Focuses on the presentation, management, and administration of the user's connection to their technology environment
- **Experience centric** – Focuses on the presentation, management, and organization of the user's work activities, as well as enterprise and employee communications

Experience-centric intelligent digital workspace applications curate, manage, publish, and deliver editorial, image, rich media, and product content and communications to employees, customers, partners, and other authenticated audiences via omni-channel experiences including websites, mobile apps, social networks, digital signs, IoT apps, and conversational interfaces. Experience-centric IDW solutions can be deployed on premises or in multiple cloud configurations. IDC defines its cloud taxonomy with the following:

- **Multitenant software-as-a-service applications (SaaS apps)** services are based on a service composition and delivery model made up of a utility computing environment in which unrelated customers share a common application and infrastructure resources that are managed by an independent software vendor (ISV) or a third-party service provider.
- **Platform-as-a-service (PaaS)** solutions are designed and offered as private cloud-ready solutions. IT assets are typically owned and managed by the customer and dedicated to a single customer. Whether designed for public or private cloud, all PaaS, at a minimum, must conform to IDC's eight basic cloud characteristics: solution packaged, shared/standard services, elastic resource scaling, self-service, elastic term-based pricing (no perpetual license), ubiquitous (authorized) network access, standard UI technologies, and published service interface/API.
- **Single-tenant software** can be deployed in either a public or private cloud in which each instance of the software is dedicated to a single customer for an extended duration.
- **Public cloud** services are shared among unrelated enterprises and/or consumers, open to a largely unrestricted universe of potential users, and designed for a market, not a single enterprise with resources that can be quickly (less than one hour) reallocated to another customer.
- **Private cloud** services are shared within a single enterprise or an extended enterprise, with restrictions on access and level of resource allocation. Dedicated hardware can be also virtualized or bare metal, but in either case, the entire system (physical compute and storage

plus virtual private network) is used only by a single customer and cannot be reallocated to another customer in less than one hour.

## LEARN MORE

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### Related Research

- *Worldwide Website Software Market Shares, 2022: Demand Slows Despite Hybrid Headless CMSs Entering the Market* (IDC #US51147623, August 2023)
- *IDC Market Glance: Intelligent Digital Workspaces, 1Q23* (IDC #US50350823, February 2023)
- *Intelligent Digital Workspace Market Opportunity and 2020-2025 Forecast* (IDC #US48721622, November 2022)
- *Intelligent Digital Workspace Vendor Landscape* (IDC #US48721522, September 2022)
- *IDC PlanScope: Adopting Enterprise Portal or Employee Experience Applications to Transform the Intelligent Digital Workspace Experience* (IDC #US49248522, June 2022)
- *IDC MarketScape: Worldwide Content Management Systems for Authenticated Digital Workspaces 2021 Vendor Assessment* (IDC #US47412921, September 2021)

### Synopsis

This IDC study provides an assessment of the vendors that provide experience-centric intelligent digital workspaces and presents the criteria most important for companies to consider when selecting a solution commonly referred to as a modern intranet, employee experience platform or an employee engagement solution. This assessment discusses both quantitative and qualitative characteristics that explain success in content, communication, collaboration, and task engagement via desked and deskless (also referred to as frontline) workers. The evaluation is based on a comprehensive and rigorous framework that assesses vendors relative to the criteria and one another. The study highlights the factors expected to be the most influential for success in the market during both the short term and the long term.

"The recent demand of generative AI to help improve employee productivity and collaboration needs to be balanced with the desire for easy-to-use consumerlike apps to serve the workforce inside and outside the office," said Holly Muscolino, group vice president, Enterprise Content Strategies and the Future of Work at IDC. "Organizations cannot afford to dismiss the technology that is at the heart of the employee experience – streamlined news and communications combined with a business-centric process automation that enhances the transactional digital workspace with AI and generative AI capabilities."

## About IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

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