

Market Guide for Social Network Analysis

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This analysis profiles eight vendors of tools used to analyze relationships and interactions among people in internal social networks. IT leaders can use this document to gain an understanding of the social network analysis landscape and vendor-specific functionality.

Key Findings

- As more and more companies embrace the digital workplace, leaders look for ways to measure their employee engagement and collaboration levels.
- Companies use social network analysis to help them manage change, facilitate mergers and reorganizations, improve collaboration, enhance innovation, spot talent and plan for succession.
- Digital workplace initiatives typically require considerable change to an organization's departmental structures. Insight from social network analysis (SNA) can help digital workplace leaders carry out effective restructuring.
- SNA is also used across different industry verticals with particular growth in telecom, banks, retail, insurance and consumer packaged goods, as they have significant customer knowledge available for mining.

Recommendations

- Identify and understand the purpose of social network analysis (for example, organizational change and identification of knowledge gaps, among others) within your organization before embarking on a deployment.
- Address issues of privacy and confidentiality during the planning process. Confirm participant buy-in and determine the sensitivity of the data that will be analyzed and how the results of the analysis will be utilized and communicated to those who are affected.
- Determine whether you require the vendor to support analysis of electronic artifacts (email, IM, enterprise social network applications and so on) or whether collecting information from an employee survey is sufficient.
- Select vendors with products that fit your requirements and consider other differentiation factors such as geographic presence, industry focus and price. In addition, have your

shortlisted providers run a proof of concept and select the vendor that best matches your needs.

Strategic Planning Assumption

By 2018, 25% of large organizations will incorporate social employee recognition and rewards into their performance management processes.

Market Definition

SNA tools are used to analyze patterns of relationships among people. They are useful for examining the social structure and ties of individuals or organizations. SNA involves collecting data from multiple sources (such as surveys, emails, blogs and other electronic artifacts), analyzing the data to identify relationships, producing graphic visualizations and then mining them for new information, such as the quality or effectiveness of a team's communication patterns.

SNA tools combine data extraction, manipulation and analytic and visualization tools to distill massive databases into visual representations of linkages and interactions. Many tools also perform mathematical calculations to determine aspects of the network such as "betweenness" and centrality. Some even perform predictive analysis.

Market Direction

As more and more companies embrace digital workplace concepts, they look toward technologies that offer ways to understand their employee engagement and collaboration levels better. Social network analysis applications are used to analyze the communication and collaboration patterns of the whole organization or a specific group — for example, R&D teams, cross-organizational units and supplier networks.

SNA can be used to:

- Understand the flow of information and knowledge
- Identify the key knowledge brokers
- Highlight opportunities for increased knowledge flow to improve performance

Companies use organizational network maps to help them manage change, facilitate mergers and reorganizations, enhance innovation, spot talent and plan for succession. SNA is also being used in electronic discovery (e-discovery) and other investigative applications, such as fraud detection or crime prevention. In addition, SNA can also be applied in the consumer space to identify target markets, create successful project teams and identify influencers. SNA is gaining traction in sales organizations, which see it as a means of identifying decision makers and determining relationship strength. These applications will increasingly be used to mine data from social media sites.

As enterprises become more virtualized with people working in different locations and time zones, perhaps operating under different objectives, bridging these virtual gaps becomes a key element of digital workplace initiatives. These initiatives will be much more successful in terms of getting work done if there is an understanding of the structure of informal relationships and work patterns that SNA can reveal.

A rigorous network analysis turns up information sharing and interaction, as well as uncovering trust networks. SNA helps identify issues such as groups that need to be collaborating more frequently based on the work they do, existing informal communities that can be supported with technology better, and who the network influencers are. SNA is often performed in conjunction with a consulting effort that applies other qualitative and quantitative research methods.

SNA is also gaining momentum in industries with significant quantities of customer information to be mined — for example, telecommunications, banking and retail. In telecommunications, SNA uses information from call distribution records (such as number dialed, incoming caller number, call count and type of call) to find out about the individual consumer and their calling circle. This basic information can then be added to other information to provide specific datasets for different activities, such as preventing churn or planning marketing promotions.

The SNA tools for analysis and visualization of network interactions have been in existence for more than a decade but the market has not witnessed significant traction. Historically, adoption of SNA has been hampered by difficulty in collecting relevant and reliable networking data. It has also been hampered by the perception that this type of analysis is highly conceptual and the information collected difficult to translate into practical actions. The tools provide insight into relationships and interactions that can be examined further using other research methods.

More recently, vendors of enterprise social network applications such as Jive and Zimbra have incorporated SNA concepts into their products that automate data collection and demonstrate the practical uses of the analysis results. They provide practical features, such as suggesting people to follow or filtering content, which help to improve the perception of SNA as overly academic and so not helpful for practical applications.

Market Analysis

In the following sections, we examine several key social network analysis market characteristics and trends. The comments, charts and tables are based on the analysis of survey data provided by representative vendors in this market. For more details on the survey, as well as the vendors, see the following Representative Vendors and Evidence sections.

Delivery Models for Social Network Analysis Software

Multi-tenant hosted model is the most common deployment models among SNA vendors. However, some of the vendors covered in this report, still have considerable on-premises deployments.

Table 1. Delivery Models for Social Network Analysis Software

Vendor	On-Premises	Single Tenant Hosted	Multitenant Hosted	Hybrid Hosted and On-Premises
CYRAM	√			
DNA-7			√	
Maven7			√	
Optimice			√	
SYNAPP			√	
Syndio			√	
The Morphix Co.	√			
TrustSphere	√	√	√	√

Source: Gartner (July 2015)

Geographical Presence

North America is the region supported by most vendors of social network analysis. However, two major vendors in the market constituting significant portion of overall deployments dominate the Asia/Pacific region.

Table 2. Geographic Presence of Different Vendors

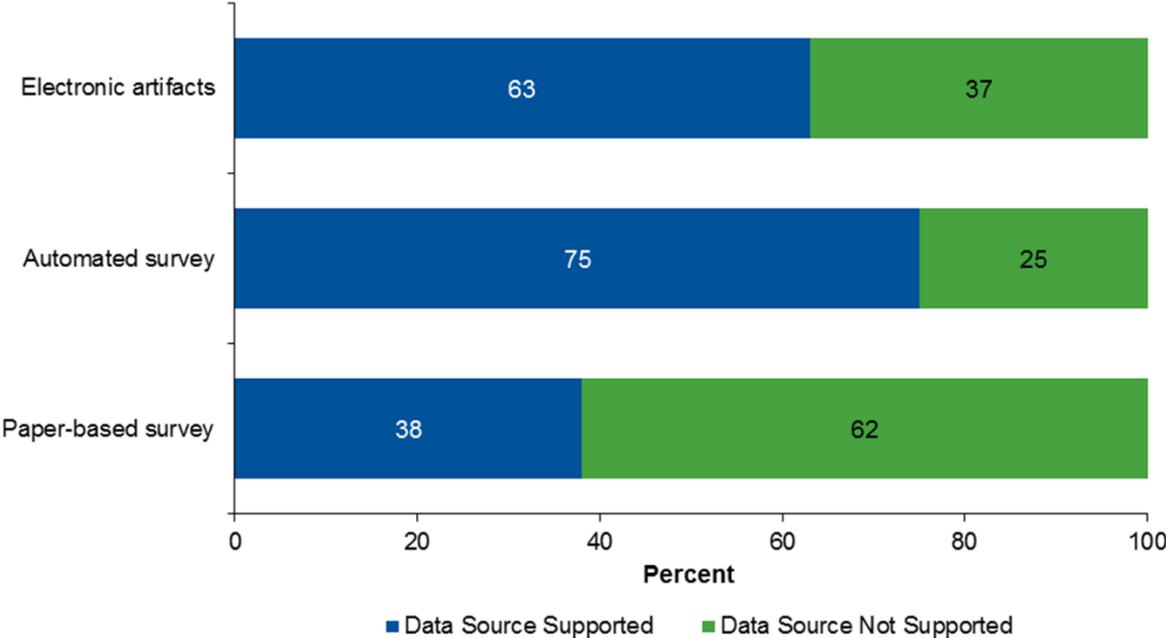
Vendor	North America	Western Europe	Central/ Eastern Europe	Latin America	The Middle East and Africa	Asia/Pacific
CYRAM	√	√	√			√
DNA-7	√	√			√	
Maven7	√	√	√	√		
Optimice	√	√		√		√
SYNAPP	√					
Syndio	√					
The Morphix Co.	Not available	Not available	Not available	Not available	Not available	Not available
TrustSphere	√		√		√	√

Source: Gartner (July 2015)

Sources Used by Social Network Analysis Product to Collect Information

A number of vendors do support electronic artifact (email, IM, blogs, social media), but automated surveys still remain the most means of collecting information about social network characteristics and interactions. Among the electronic artifacts, email remains the most common information source supported by vendors.

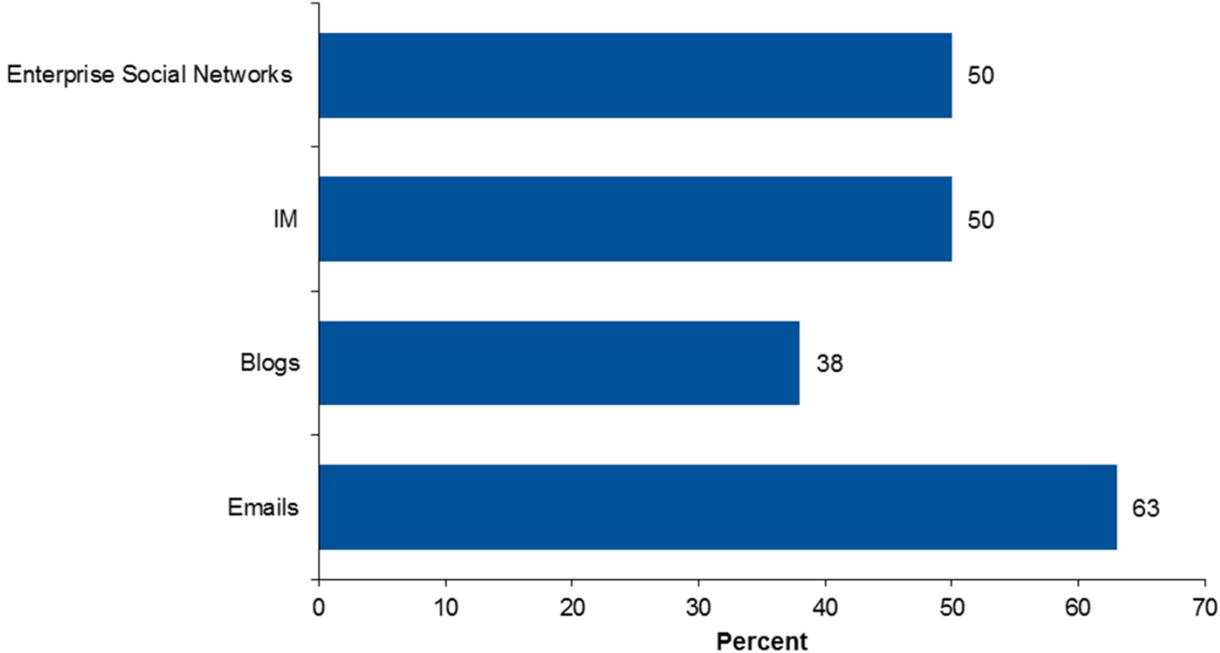
Figure 1. Percentage of Vendors Supporting Various Information Sources



The analysis in Figure 1 is based on the responses by vendors where n = 8

Source: Gartner (July 2015)

Figure 2. Percentage of Vendors Supporting Various Electronic Artifacts



The analysis in Figure 2 is based on the responses by vendors where n = 8

Source: Gartner (July 2015)

Table 3. Information Sources Supported by Social Network Analysis Products

Vendor	Paper-Based Survey	Automated Survey	Electronic			Artifacts	Others
			Emails	Blogs	IM	Enterprise Social Networks (2)	
CYRAM	√	√	√	√	√	√	<ul style="list-style-type: none"> Structured data, such as Excel, Text data such as news articles. Public Social Networks, such as Facebook and Twitter.
DNA-7		√					
Maven7	√	√	√	√	√	√	<ul style="list-style-type: none"> Log files, such as anonymized phone logs, calendar logs, CRM/ERP and system logs, among others.
Optimice	√	√				√	
SYNAPP		√					
Syndio		√	√	√	√	√	<ul style="list-style-type: none"> Has a "general source" tool built into the dash but most is custom setup.
The Morphix Co.			√			√	<ul style="list-style-type: none"> Published information on Internet
TrustSphere			√		√	√	<ul style="list-style-type: none"> Call Data Records

Source: Gartner (July 2015)

Stand-Alone Versus Integrated Software Deployment

The market is currently dominated by stand-alone deployments of SNA tools. However, as the market progresses, SNA tools will increasingly provide integration with enterprise social network applications. An example of this trend is work that Microsoft is doing with Office Graph and Delve.

Table 4. Percentage of Software Deployment as Stand-Alone or Integrated With Other Applications

Vendor	Stand-Alone Percentage (%)	Integrated With Other Applications Percentage (%)	Application Integration Capability
CYRAM	20	80	Enterprise social software, knowledge management platforms, online application market platform and customer analytics platform.
DNA-7	100		None
Maven7	100		None
Optimice	0	100	ONASurveys has export mechanisms to Excel, Node XL, Netdraw, Inflow, Gephi and yEd Graph Editor.
SYNAPP	100		None
Syndio	90	10	Existing HR systems, like MyCareer at Exelon. This is currently custom integration.
The Morphix Co.	Not available	Not available	Custom integration supported on request.
TrustSphere	30	70	CRM Applications, HCM Applications, Security & Risk Management Applications and other analytics platforms

Source: Gartner (July 2015)

Representative Vendors

The vendors listed in this Market Guide do not imply an exhaustive list. This section is intended to provide more understanding of the market and its offerings.

We consider the vendors and products listed here to be representative vendors, specifically, vendors with products that are marketed and sold specifically as social network analysis products and which are bought and used for this purpose. These vendors have achieved some level of visibility and traction in this market. Vendors have been listed in alphabetical order rather than ranked in priority.

CYRAM

www.cyram.com

CYRAM is based in Seoul, Korea with more than 2,000 deployments for its social network analysis products. It offers four products NetMiner, NetExplorer, NetViz and NetMetrica, each supporting a specific use case.

- NetMiner is used for analyzing and visualizing network data.
- NetExplorer is used for detecting insurance fraud and criminal investigation.
- NetViz facilitates online visualization and navigation functions on the network data.
- NetMetrica is used for network analysis consisting of theoretically unlimited numbers of nodes and links.

The company derives a significant amount of its revenue from professional services comprising consulting, data analysis and training services and is one of the few companies with a presence in this market for around a decade.

Table 5. CYRAM

Attributes	Details
Number of employees dedicated exclusively to social network analysis product.	More than 20 employees
Product name	NetMiner; NetExplorer; NetViz; NetMetrica
Software-only list price	The average one-year subscription price is \$22,118 for NetExplorer/NetViz/NetMetrica (with no limit on number of users, uses per server system license).
Dominant geographies	Asia/Pacific
Industries with high vendor penetration	The public sector, telecom and financial services
Notable customers	Fidelity (U.S.), Pfizer, World Bank, Harvard University and the Australian Government Department of Defense
Implementation/consulting partners	Not available

Source: Gartner (July 2015)

DNA-7

www.dna-7.com

With its headquarters in Beersheba, Israel, DNA-7 currently supports automated surveys as its source of information. Survey analysis is represented in over 25 key indexes across the entire

organization, business units, teams and employees. The tool also provides users with comparison reports to navigate results from different surveys and compare to other companies in the same vertical.

DNA-7 is designed for senior management tasked with change management, onboarding new employees and workforce optimization. The company also provides network and data interpretation services and customized reports for HR and management, either directly or through consulting partners.

Table 6. DNA-7

Attributes	Details
Number of employees dedicated exclusively for social network analysis product	Less than 10 employees
Product name	DNA-7
Software-only list price	\$50 per employee
Dominant geographies	The Middle East and Africa, Western Europe
Industries with high vendor penetration	Healthcare, manufacturing and retail
Notable customers	Nespresso, Kuka Robotics, Tnuva
Implementation/consulting partners	Active Value Advisors (Italy), Novotus (U.S./Texas), HR Boost (U.S./Chicago area), Huli Raz Consulting (Israel)

Source: Gartner (July 2015)

Maven7

www.maven7.com

Founded in 2009, Maven7 has headquarters in the U.S. (Boston, MA) and Budapest (Hungary). Its online organizational diagnostic tool OrgMapper is available in a number of modules, each supporting a specific use case:

- ChangeMapper supports the acceleration of organizational change initiatives.
- TalentMapper supports the identification and development of existing talents and potential high performers.
- TeamMapper supports the enhancement of team collaboration.
- KnowledgeMapper supports the understanding of an organization's flow of knowledge.
- PerformanceMapper supports the aligning of corporate strategies with human delivery.

All its modules are augmented with organizational diagnostics and consultancy services that help in network analysis, interpretation, and designing and implementing forward-looking intervention programs. OrgMapper uses automatic survey as its source of information, but it can include other sources of information such as email, phone, calendar or ERP/CRM system logs via its Logfile analysis, LogMapper.

Table 7. Maven7

Attributes	Details
Number of employees (dedicated exclusively to social network analysis product).	Between 10 to 20 employees
Product name	OrgMapper
Software-only list price	OrgMapper's pricing is project-based, not subscription-based. Prices are calculated per participant within the analyzed community.
Dominant geographies	North America, Central/Eastern Europe
Industries with high vendor penetration	Engineering, IT, telecom, banking
Notable customers	E.On, GlaxoSmithKline, Swissgrid
Implementation/consulting partners	Ascon (Hungary), Csanádi Csoport (Hungary), Grow Group (Hungary), Flow csoport (Hungary), Hackl (Hungary), HR-Line (Hungary), Humantelex (Hungary), OD Partner (Hungary), P-Invent (Hungary), Mindworks Knowledge Lab (Hungary), Train to Lead (Hungary), Venustus (Hungary), Brice Consulting (U.S.), EHS Support (U.S.), SPI Consulting (U.S.), Santiago Consultores (Spain), CzMed (Czech Republic), Kivala-HR SA (Switzerland), Omni Management Consulting Alliance (Canada), Wisewalkers (Hong Kong), Better Change (New Zealand)

Source: Gartner (July 2015)

Optimice

www.optimice.com.au

Optimice was founded in 2004 and has headquarters in Sydney, Australia. Optimice is a consulting services company using social network analysis as the key diagnostic tool for addressing client problems.

Its primary product, ONA Surveys, is designed to collect data for organizational network analysis through automated surveys. However, Optimice also leverages its product Swoop to focus specifically on online social network analysis using only electronic sources. Swoop analyzes and reports relationships using enterprise collaboration platforms such as Yammer, Jive, Chatter and IBM Connections. Swoop output includes four different views individuals, business unit managers,

community managers and executives. It is one of the few companies that have been in market for around a decade and has a considerable amount of deployments.

Table 8. Optimice

Attributes	Details
Number of employees dedicated exclusively to social network analysis product.	Less than 10 employees
Product name	ONA Surveys, Swoop
Software-only list price	\$750 for ONA Surveys; \$10,000 to \$30,000 for Swoop
Dominant Geographies	Asia/Pacific
Industries with high vendor penetration	Banking and finance, manufacturing, energy utilities, natural resources (mining, oil and gas), public administration, facilities management, IT services, engineering services, transport and logistics.
Notable customers	ONASurveys: Commonwealth Bank, Qantas, Telstra, Novartis (Global), Royal Society for the Arts (U.K.), IBM (U.S.), Queensland Department of Transport, PWC (Australia and U.K.) Swoop: Macquarie Bank, Telstra
Implementation/consulting partners	Open Knowledge (Milan, Italy), St. James Ethics Centre (Sydney, Australia), Institute of Executive Coaching and Learning (Sydney, Australia), Lend Lease and Suters Architects, Blackhall & Pearl (Melbourne, Australia), Hargraves Institute (Sydney, Australia), Future IQ

Source: Gartner (July 2015)

SYNAPP

www.seeyournetwork.com

SYNAPP is a product from Philosophy IB, a management-consulting firm based in Florham Park, NJ. The company collects organizational data using short surveys, but currently does not support electronic artifacts as a source of information. The tool is also used by other consulting companies, apart from Philosophy IB in situations where clients want to restructure their organization.

Apart from organization network maps, SYNAPP also provides individualized reports to participants. It illustrates employees' unique positions in the overall network, determines their networking styles and assesses their collaboration, information access, and influencing capabilities. Each individual report is also augmented with a set of recommendations; for example, it may suggest colleagues for participants to connect with to strengthen their networks.

Table 9. SYNAPP

Attributes	Details
Number of employees dedicated exclusively to social network analysis product	Less than 10 employees
Product name	SYNAPP
Software-only list price	\$25,000 (250 users x \$100 per user)
Dominant geographies	North America
Industries with high vendor penetration	Technology, media and professional services
Notable customers	Gogo
Implementation/consulting partners	A.T. Kearney, Culture Strategy Partners

Source: Gartner (July 2015)

Syndio

www.synd.io

Founded in 2009, Syndio is based in Chicago, Illinois. Its product, Executive Dashboard, is intended to be used by C-level executives, HR professionals and IT leaders looking to understand the communication and collaboration patterns within their organizations. The insight from Executive Dashboard augments decision making for leaders looking to drive change or building a critical team.

Syndio uses a short survey to collect information on the attributes of people. However, the survey data can also be combined with other sources of electronic information, such as email, IM and so on, to create a more complete picture of employee interactions.

Table 10. Syndio

Attributes	Details
Number of employees dedicated exclusively to social network analysis product	Between 10 to 20 employees
Product name	Executive Dashboard
Software-only list price	\$45,000 for 1,000 people
Dominant geographies	North America
Industries with high vendor penetration	Large insurance organizations, energy and consumer packaged goods
Notable customers	PWC, Exelon, P&G, Healthcare Service Corporation, Lurie Childrens Hospital
Implementation/consulting partners	Maven Wave

Source: Gartner (July 2015)

The Morphix Co.

www.morphix.com

The Morphix Co. is a business consulting company based in Berkshire, U.K. Its product MetaSight analyzes email subject lines and other metadata that employees send as its primary information source. MetaSight automatically maintains a profile of "who knows who" and "who knows what" that facilitates use cases such as online expertise location and knowledge sharing. MetaSight can also map who has the best relationships with people outside the organization such as business partners and customers.

MetaSight also creates a personalized news feed from multiple sources based on an individual's personal relationship profile and interests, for example, companies they are interested in. MetaSight integrates with Microsoft Exchange, MS SharePoint and cross-platform browsers.

Table 11. The Morphix Co.

Attributes	Details
Number of employees dedicated exclusively to social network analysis product	Less than 10 employees
Product name	MetaSight
Software-only list price	Not available
Dominant geographies	Not available
Industries with high vendor penetration	Oil and gas, pharmaceutical, technology, engineering, science, finance, banking, insurance, professional services
Notable customers	Computacenter
Implementation/consulting partners	Not available

Source: Gartner (July 2015)

TrustSphere

www.trustsphere.com

Based in Singapore, TrustSphere provides relationship analytics. Its product, TrustVault, primarily analyzes the communication logs, without reading the content, across the enterprise and creates relationship maps and strength indexes. It is one of the few companies entirely based on electronic artifacts (email, IM or call detail recordings, for example) as its source of information for building organization maps and hence finds application across use cases such as risk analytics, sales analytics and people analytics.

TrustVault facilitates sales analytics by integrating a CRM application to the company's communication systems and provides insight such as unknown/hidden customer contacts, or when the customer was last contacted, for example.

TrustVault can also be used for risk analytics by analyzing communication activity between employees and competitors, who is speaking to whom, frequency, relationship strength and changes in employee communication behavior over different time periods.

TrustVault can also provide people analytics, which provides insight into employees' communications, relationships, networks and influence to facilitate organizational change.

Table 12. TrustSphere

Attributes	Details
Number of employees dedicated exclusively to social network analysis product	More than 20 employees
Product name	TrustVault
Software-only list price	\$240, per user, per year for integrated applications
Dominant Geographies	North America, Asia/Pacific
Industries with high vendor penetration	Government, telecom, manufacturing and banking, financial services and insurance
Notable customers	Crystal Indonesia, Arc Holdings Singapore, Ramco System, Optus Australia
Implementation/consulting partners	Eagle Technology (New Zealand), Full Extent (Australia), ISW (Australia), Next IT & Systems (UAE), Nikec Solutions (U.K.), Prisma Global Solusi (Indonesia), QuantM (India), Ramco (India), Random Computing (Australia), SingTel Alatum (Singapore), Smartworld (UAE), Latize (Singapore), Galaxy Business Solutions (India), Mesiniaga (Malaysia), Contactonic (Philippines)

Source: Gartner (July 2015)

Market Recommendations

- Identify and understand the purpose of social network analysis (for example, organizational change, by identifying knowledge gaps) within your organization before embarking on a deployment.
- Address issues of privacy and confidentiality during the planning process. Confirm participant buy-in and determine the sensitivity of the data that will be analyzed, and how the results of the analysis will be used and communicated to those who are affected.
- Determine whether you require the vendor to support analysis of electronic artifacts (email, IM, or enterprise social networks applications, for example) or whether collecting information from an employee survey is sufficient.
- Select vendors with products that fit your requirements and consider other differentiation factors such as geographic presence, industry focus and price. In addition, have your shortlisted providers run a proof of concept and select the vendor that best matches your needs.

Gartner Recommended Reading

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

"Market Guide: Social Analytics for IT Applications Leaders"

"Cool Vendors in the Digital Workplace, 2015"

"People Analytics Underpin the Digital Workplace"

"Hype Cycle for the Digital Workplace, 2015"

"Attention to Eight Building Blocks Ensures Successful Digital Workplace Initiatives"

"Digital Workplace Key Initiative Overview"

Evidence

In 2Q15, Gartner conducted a survey on social network analysis vendors. Out of 11 vendors shortlisted to participate, there were eight valid submissions based on the attributes of a representative vendor. The respondents were CYRAM, DNA-7, Maven7, Optimice, SYNAPP, Syndio, The Morphix Co. and TrustSphere. As required by Gartner's research methodology, vendors received a copy of the information for factual review prior to publication.

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