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The Multiplayer Enterprise

Why Culture, Not Just Collaboration Technology, Will Decide Who Wins the AI Era



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Executive summary

Collaboration spending keeps climbing, with the collaboration applications market on track to top $100 billion by 2028. Yet, most enterprises still get tools that let teams work alongside each other rather than with each other. IDC's *2025 Annual Collaboration Survey* (n = 563) shows the shift already underway: **Work is taking on multiplayer-game traits (e.g., strategic alignment, role-based access, real-time collaboration across human-to-human, human-to-AI, and AI-to-AI layers), and the market is voting with its budget. But technology alone won't decide the winners; culture will.** Organizations that pair AI investment with trust, outcome-based metrics, an evolved work surface, and permission to experiment are the ones pulling ahead on retention, hiring, and competitive advantage.

"Collaborating together separately" reinforces silos instead of dissolving them.

Source: IDC's Software Tracker, June 2026

$100+ billion

Projected size of the worldwide collaboration software market by 2028...

... despite mixed enterprise results and persistent questions about return on investment



Why now

Linear work is breaking



The end of work steps 1 → 2 → 3

Industrial-era linear work, a satisfying, sequential march from start to finish, is giving way to nonlinear work, driven by AI, agents, human collaboration, and integrated real-time systems.



One place, not an array

Effective collaboration and outcomes require working in one central place, not scattered across an array of disconnected applications.



Friction is the bottleneck

Traditional silos, a lack of collaborative norms, security concerns, and cost are the friction points slowing AI-enhanced adoption.



A new definition of effective

The last century's work activities will not define what effectiveness looks like in the AI era.

PART ONE:

Defining the multiplayer enterprise

Collaboration is taking on the traits of a multiplayer game.

2

Parts: 1 2

The reframe

Work is taking on multiplayer-game traits

Strategic alignment. Multiplayer expertise. Role-based system access. Real-time collaboration. Collaboration now spans three distinct layers:



Human to human

The collaboration enterprises have always known: teams working directly with one another



Human to AI

People directing, reviewing, and refining the work of AI agents inside the flow of work



AI to AI

"Substrate collaboration" through agent sharing of prompts, context, and learnings with or without a human in the loop



The canvas is the new "campground," a personalized, high-value home surface for each person on the team: a meeting place for initiatives and the flow of work, not just a stop in a project.

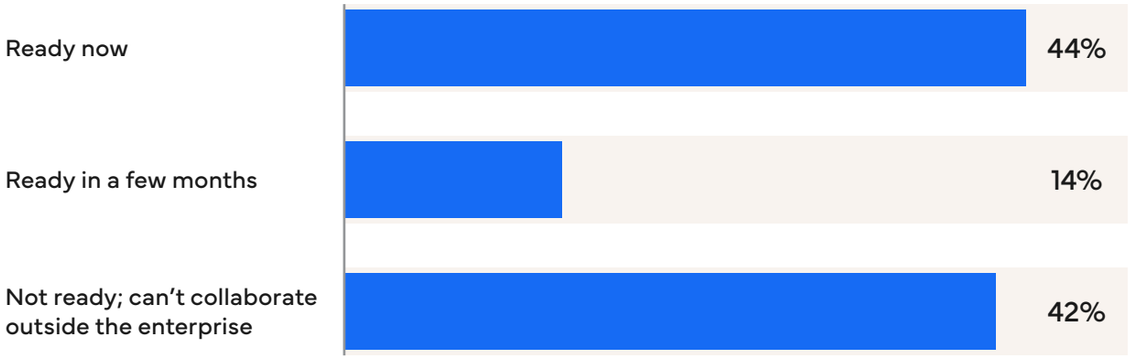
Parts: 1 2

Proof point

External collaboration is already the norm

Readiness hasn't caught up with intent.

Only 44% of organizations say they're currently technologically ready to collaborate with external customers and partners on collaboration platforms (beyond email and conferencing). Another 14% expect to be ready soon, but 42% say they still can't share and collaborate outside the enterprise at all: a competitive disadvantage.



n = 563; Source: IDC's *Annual Collaboration Survey*, 2025

86%

of organizations use multiple collaboration modalities with external parties, including partners and customers.

For more than half, this is limited to just conferencing. This connects people and grounds AI and agents with real-time content and context and needs to extend to all collaborative applications.



Parts: 1 2

The market

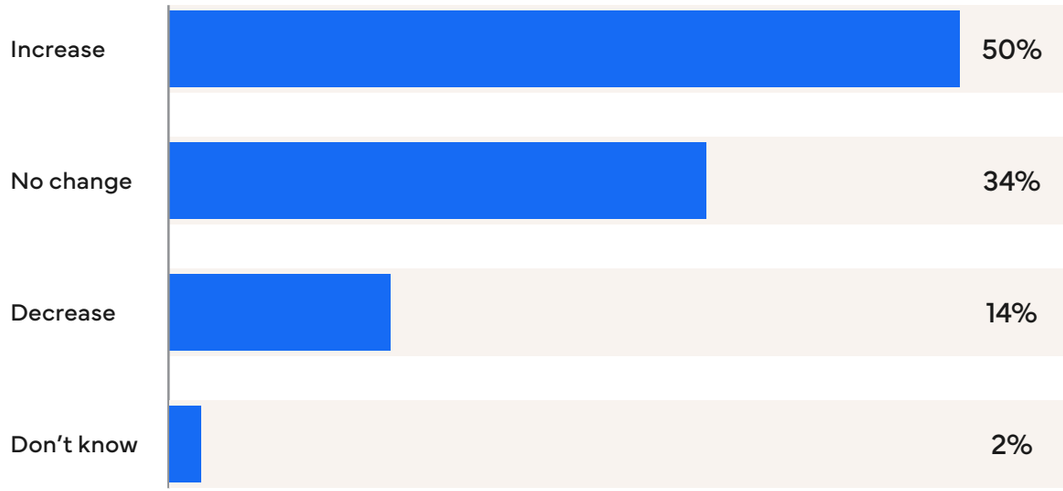
The market is already moving

About 75% of collaborative software revenue is shifting toward platforms that support or integrate with a new multiplayer workspace. The market is voting with its budget, even though most of the market is not yet mature.

Team buying: Collaboration software is purchased by consensus across seven lines of business on average: a buying-behavior signal, not just a trend.

Individual AI use, paired with enterprise mandates, tends to promote token-maxing, siloed behaviors that don't always deliver positive ROI.

Planned collaboration software spend versus previous year



Around half of companies plan to increase collaboration software spending this year.

n = 563; Source: IDC's *Annual Collaboration Survey*, 2025

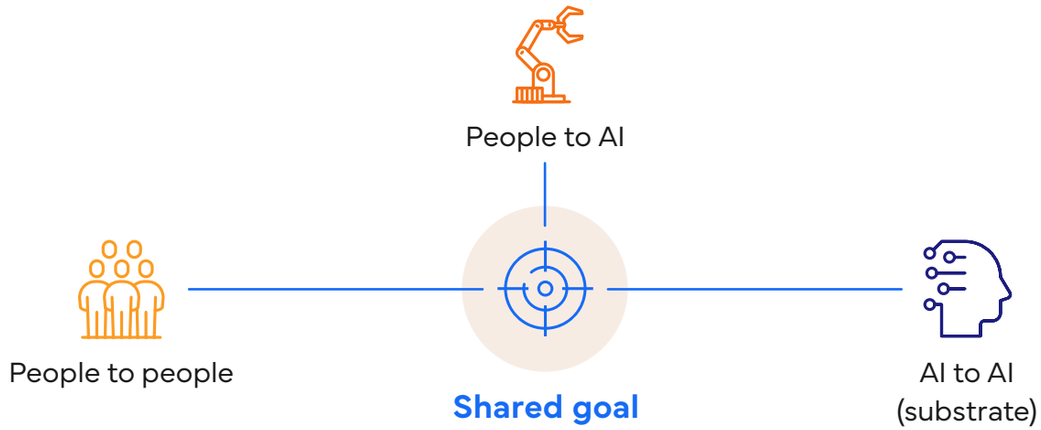
Parts: 1 2

Nonlinear work

AI is the cheat code for nonlinear work

A shift is already emerging across today's workplaces. Nonlinear workflows demand new skills, including creativity and critical thinking, to orchestrate, adjust, and monitor multiple AI agents effectively. AI adds a new layer to collaboration: people working with people, people working with AI, and AI collaborating with AI. All of it serves the same common goal.

Each collaboration type happens independently, all supporting one shared goal.



n = 563; Source: IDC's *Annual Collaboration Survey*, 2025

9

is the average number of applications integrated into a team's primary collaboration stack.

About 30%

of organizations already integrate 10 or more applications; deep integration is becoming the norm, not the exception.

Parts: 1 2

Security, governance, and compliance

Multiplayer; single control

Facilitate support for rapidly evolving security, governance, and compliance standards.

Apply headless benefits

When servers deliver data to the collaborative interface, server security and management protocols simplify governance, security, and compliance management.
For the benefit, the protocols must exist in the core collaborative application.

Simplify your control plane

Centralizing context access through a single Model Context Protocol (MCP) server creates one control point rather than many scattered integrations, making it easier to apply and update granular permissions.

Manage agents as people

When multiplayer channels provide context-gate access, they can work with agents in the same way they do for people. This makes management more effective, more consistent, and easier to adjust.



Early adopters, one in four companies, report "improved security/governance" with an integrated, multiplayer workspace. The number of companies rises higher with more than 10 integrated applications to their multiplayer workspace.

n = 563; Source: IDC's *Annual Collaboration Survey*, 2025

Parts: 1 2

The split enterprise

Every enterprise now runs two workforces at once

Each with a different adoption curve for AI and collaboration tools inside the very same company.

	Historically		Emerging
People	As an asset to be used	→	An asset to be developed
Collaboration	Provides tools; fosters silos	→	Fosters a culture of collaboration
Location	Rigid location mandates	→	Supports hybrid flexibility
AI use case	AI to reduce head count	→	Empowers new ideas and revenue streams
Skills	Traditional "survival" skills	→	Creativity, collaboration, and critical thinking
Social trend	Use social media	→	Actively social across channels and communities
Metrics	Point legacy metrics	→	Outcome-based metrics
The internet	Where to get info, buy, and sell	→	A place to learn, collaborate, act, and transact

Source: IDC's *Saucy, Audacious, and Human: Winning in the Era of Intelligent Collaboration*, July 2026



Parts: 1 2

The end state:

Desilofication, collaboration as a team sport

Purchased and used against outcome metrics, not proxy metrics

APIs and MCPs are a start, but they don't deliver a consolidated user experience.

Integrated multiplayer canvases create a flexible, "single-pane" intelligent workspace.

Agents that share prompts and contextual learning reduce token consumption and foster peer mentoring that drives real-time AI literacy.

Command-and-control management becomes a liability. Wall-to-wall enterprise connectivity means everybody is connected.

Improve AI results, with a defined "AI etiquette" that includes norms, attribution, and escalation practices.

Build trusted agentic solutions, leverage creativity, and create new revenue streams with existing talent.



More than one in four organizations plan on adding multiplayer canvas layers to their collaboration stack this year.

n = 563; Source: IDC's *Annual Collaboration Survey*, 2025

1

PART TWO:

Culture beats technology alone

Technology doesn’t create collaboration; people do. AI amplifies whatever culture it’s dropped into.

Parts: 1 2

The cascade effect: Same investment, three very different outcomes



Tech-first, culture-weak

Same investment:
Adoption stalls; silos persist.

Culture-first, tech-ready

Same investment:
Trust compounds; innovation accelerates. This rewards creativity and implements trials.

Culture, tech, and AI aligned

Same investment:
Substrate collaboration works as competitive acceleration becomes visible. People and AI combine for innovation guided by critical thinking.

Parts: 1 2

Culture

The four pillars of a multiplayer-ready culture



1

Trust

Trust expands to include people, functions, leadership, systems, and technology, supporting a collaborative multiplayer workplace.

25%

see better security and governance outcomes, tied to a mature collaboration culture.



2

Outcome metrics

New data and AI-driven insights shift business from proxy metrics (logins, messages) to business outcomes.

1 in 4

mature collaborative organizations already tie collaboration directly to outcomes and are creating new-era metrics.



3

Evolved work surface

Multiplayer, multimodal, AI-capable tools are the equity layer for hybrid, remote, and frontline workers.

82%

report visual collaboration improves their effectiveness.



4

Permission to play, learn, share

Experimentation drives breakthrough use; peer modeling outperforms formal training.

79%

of leaders want more time to experiment (in their words, to "play with new technologies").

Source: IDC's *Annual Collaboration Study,* 2025; IDC's *Market Perspective,* December 2025

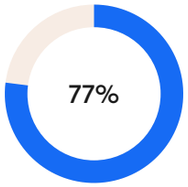
Parts: 1 2

Culture (continued)

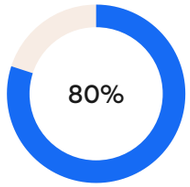
Peer mentoring scales culture faster than training

Continuous learning and adaptation

AI raises, not lowers, the value of distinct human skills such as creativity and critical thinking.



value creativity more than five years ago.



value critical thinking more than five years ago.

Peer mentoring scales culture faster than training

The fastest path to a multiplayer-ready culture is peer-to-peer, not top-down.

Source: IDC's *Annual Collaboration Study,* 2025; IDC's *Collaboration's Hidden Secret Sauce,* 2026



10:1

Peer mentoring and behavior modeling outperform corporate training alone in driving adoption of new collaborative behaviors.

> The word 'play' no longer has to be viewed as the opposite of work. Play is where all the good ideas are hiding."
>
> **Wayne Kurtzman**

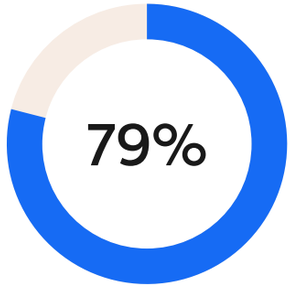
Source: IDC's *Market Perspective: Creativity, Play, AI, and the Multiplayer Workspace,* December 2025

Parts: 1 2

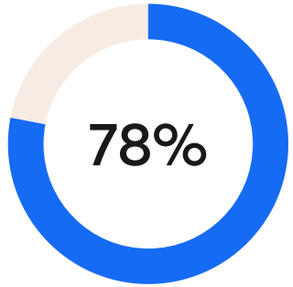
The stakes

The competitive window is closing

First-mover advantage compounds; the cost of waiting is a hindered ability to catch up.



of organizations report better employee retention with a strong collaboration culture, including a collaboration application stack.



of organizations cite easier hiring with a strong collaboration culture and a strong collaboration application stack.

Talent is already migrating toward multiplayer-ready employers. Organizations that wait are not standing still, yet they're falling behind competitors whose collaboration culture already compounds trust, retention, and innovation. Market signals indicate that companies are positioning themselves for a collaborative, multiplayer future where the flow of work, people, and AI is better aligned and more transparent than was ever possible before.

Source: IDC's *Annual Collaboration Study*, 2025



Conclusion

Architect the multiplayer workspace and workforce, not a feature list

The multiplayer, intelligent, collaborative workspace unifies one AI-enabled surface with messaging, video, content, visual collaboration, and workflow grounded in trust from the data of every integrated corporate system and informed by the complete workforce.









The four pillars, built into one workspace, produce the end state: desilofication, wall-to-wall connectivity, and a workforce fluent enough with AI to keep compounding its advantage.



“The multiplayer enterprise isn’t a feature set:
It’s a culture, amplified by AI, played by everyone at once.”

Wayne Kurtzman
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About the IDC analyst



Wayne Kurtzman

Research Vice President,
Social, Communities, and Collaboration, IDC

Wayne Kurtzman, research vice president for IDC's Collaboration and Communities, is a frequently quoted source on the future of enterprise collaboration, communities, and the customer and employee experience. He is responsible for the IDC Social, Communities and Collaboration practice.

More about Wayne Kurtzman →

Message from the sponsor

slack from Salesforce

AI is only as powerful as the work it can see.

IDC's research shows work shifting from linear steps to nonlinear collaboration across people, AI, and agents. Yet 42% of organizations still can't collaborate outside the enterprise, and individual AI use often fails to deliver ROI. The market is already moving: about 75% of collaboration software revenue is shifting toward multiplayer workspaces, and 79% of organizations with a strong collaboration culture report better retention.

Without shared context, insights stay trapped in private chats. Slack brings people, agents, apps, and data together in one shared workspace. Context stays open, permissions stay consistent, and every result helps the next person. Individual AI makes people faster. Multiplayer AI makes companies smarter.

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