

The Forrester Wave™: Enterprise Content Management, Q3 2013

by Alan Weintraub, Craig Le Clair, and Cheryl McKinnon, September 19, 2013

KEY TAKEAWAYS

Requirements Are Driven By User Productivity Goals As Well As Compliance Needs

Our leaders show well-balanced ECM product portfolios that can address an organization's needs for fundamental library services, security, or retention rules and can deliver tools to automate and streamline content-rich business processes. Leaders meet a broad range of requirements to increase productivity as well as meet compliance obligations.

ECM Vendors Focus On Solutions And Flexibility To Drive Adoption

Vendors are moving to address customer demand for less-complex deployments and ECM platforms that can quickly deliver results. User interface flexibility; faster ramp-up via cloud or SaaS offerings; and mobile experiences for core capture, search, and process execution are areas where vendors are investing organic R&D and/or acquisition dollars.

Role Players Continue To Pressure The Traditional Heavyweights With Targeted Solutions

While established vendors continue to dominate the leadership position, role-players are eroding their market share by delivering targeted solutions solving specific business problems. The majority of solutions are focused on transactional areas that provide measureable ROI.

The Forrester Wave™: Enterprise Content Management, Q3 2013

by [Alan Weintraub](#), [Craig Le Clair](#), and [Cheryl McKinnon](#)
with [Leslie Owens](#) and Emily Jedinak

WHY READ THIS REPORT

The enterprise content management (ECM) market has continued to diversify, with vendors turning to solutions focused on business and transactional content technologies. End users are looking for ways to better manage and utilize their content, returning a faster, more definable return on investment (ROI). In Forrester's 48-criteria evaluation of ECM vendors, we assessed the offerings of 13 influential providers: Alfresco Software, EMC, HP Autonomy, Hyland Software, IBM, M-Files, Microsoft, Newgen Software Technologies, OpenText, Oracle, Perceptive Software, Unisys, and Xerox. This Forrester Wave™ evaluation details our findings on how well each vendor fulfills our criteria and helps companies select the right vendor for enterprise content management.

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Notes & Resources

Forrester conducted questionnaire-based evaluations in March 2013 and interviewed vendor and user companies Alfresco Software, EMC, HP Autonomy, Hyland Software, IBM, M-Files, Microsoft, Newgen Software Technologies, OpenText, Perceptive Software, Unisys, and Xerox.

Related Research Documents

[Improve ECM Satisfaction Levels Through Agility, Analytics, And Engagement](#)
July 12, 2013

[The Forrester Wave™: File Sync And Share Platforms, Q3 2013](#)
July 10, 2013

[Trends In Mobility, Cloud Computing, And Analytics Share Up ECM](#)
January 11, 2013



ECM MARKET BOUNDARIES ARE SHAPED BY HOW CONTENT IS USED

Forrester defines the enterprise content management market according to how the content is put to use: to support customer-facing business activities or to support internal company activities. Software to manage persuasive content for customer-facing business activities is now a distinct category within the customer experience management landscape. Content management technology for internal use falls into three categories; foundational, business, and transactional (see Figure 1).

- **Foundational ECM provides basic content management functionality.** Foundational content technologies deliver a core set of required services, such as check-in/checkout, permissions, archiving, and basic workflow. Foundational ECM also includes support for records and retention management, taxonomy, search, and eDiscovery. Applications that have not traditionally been content based, such as customer communication management, increasingly feature foundational content functionality or integrate with ECM products that provide it.
- **Business content drives the day-to-day workplace experience.** Business content originates within the enterprise and helps workers complete day-to-day tasks and share ideas. Business content includes familiar formats such as office documents, presentations, spreadsheets, and multimedia. This type of content captures and informs a wide range of business activities and may be formal (structured templates or forms) or informal (created ad hoc). For example, business content related to contract negotiation may include approved language vetted by the legal department, along with a digital photo of a pricing model developed on the back of a napkin. Technologies that support business content needs include document management (DM) and team collaboration.
- **Transactional content drives back-office processes.** Transactional content generally originates outside of the enterprise from third parties such as customers and partners and relies on complex workflows or business process management (BPM) to drive processes. Formats include scanned faxes, print streams generated from back-office applications, and electronic records. Enterprises use transactional content to gather insights on questions such as, “How many claims were received today?” or “What does mortgage volume look like by region?” Technologies supporting transactional content include multichannel capture, enterprise report management (ERM), and e-forms.

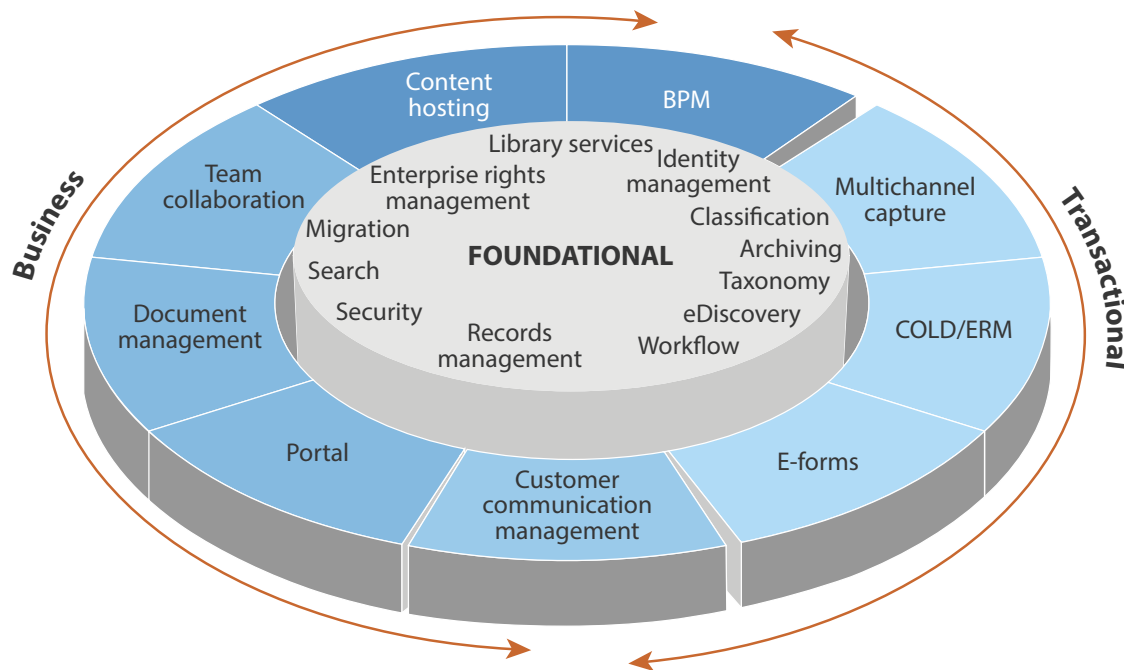
This Forrester Wave will evaluate the effectiveness of each vendor in three areas:

- **Overall capabilities.** The ECM vendors will be evaluated across each content technology to create an overall rating on their ability to deliver multiple ECM capabilities.
- **Business content technologies.** The ECM vendors will be evaluated on their ability to address business-content-related requirements and solutions.

- **Transactional content technologies.** The ECM vendors will be evaluated on their effectiveness for meeting transactional capabilities.

Foundational capabilities are common to both business content and transactional content technology areas.

Figure 1 Content-Centric Technologies Supporting The Content Spectrum



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Source: Forrester Research, Inc.

USER NEEDS AND BUSINESS DRIVERS ARE CHANGING

ECM project justifications have changed over the past six years from focusing on compliance to improving productivity. Organizations want better ways for their employees to derive value from content and increase the flexibility in the work environment.

Clients Move From Suites To Solving Specific Business Problems

Organizations are moving away from the notion that an ECM suite will meet all their needs. It is hard to quantify the ROI of a suite without associating it to a specific business case. In a May 2013 survey conducted by Forrester, 44% of ECM professionals were unable to quantify the ROI for their ECM projects.¹ Of those that were able to measure their ROI, most found benefits in transactional associated solutions that focused on automating processes and eliminating the bottleneck of paperwork, e.g., case management solutions that help automate a dynamic workflow process.

New Systems Of Engagement Disrupt The Traditional ECM Market

Emerging content collaboration tools are disrupting the management of company information. End users adopt content collaboration technologies such as Box and Dropbox to easily access and share information between colleagues and partners. Such tools expand the file share interface, previously limited by security controls and firewalls to a self-service model that extends access beyond the company controls. This new transparency has the potential to become the gold standard for content management success. The major problem with this new sharing capability is the loss of content controls required by legal and compliance to meet regulatory standards.

“Mobile First” Has Become The User Expectation

The work-anywhere future is a world in which work is something you do, not a place you go. End users are demanding new systems of engagement that focus on the context in which they work and not the processes that drive the business function.² Systems of engagement are made possible by the extension of functionality from the desktop to the mobile device, thus allowing a continual work environment. End users seek content transparency from any device. This is similar to the Amazon Kindle eBook approach, where a user can have a continuous reading experience from multiple devices without losing the last page read.

Usability And Flexibility Drive Adoption

ECM solutions have proven to be one of the most disruptive technologies, often requiring users to dramatically change the way they work. These users may not always appreciate the benefits of the new system, finding ways around the new processes. To counter these issues, enterprise architects look for ways to implement ECM solutions that can be presented in ways that are familiar to users, mimicking folder structures used on desktops or resembling simple web or mobile applications. Empowering the user to configure the ECM interface is a high priority for a successful adoption, providing transparency to the way the user wants to work.

ECM VENDORS RESPOND TO THESE MARKET CONDITIONS WITH NEW CAPABILITIES

ECM vendors are paying attention to competitive pressures and the needs of their customers and prospects. ECM decision-makers have begun to adopt more-agile deployment methodologies in an effort to improve user adoption and satisfaction levels.³ Vendors with a stagnant or poorly communicated product road map, a complicated integration approach, or a lack of support for rapid application delivery risk losing their market share.

User Interfaces Get Some Long-Overdue Tender Loving Care

Many vendors have invested in improvements to their user interfaces through either acquisition or organic research and development (R&D). The competitive pressures posed by both Microsoft SharePoint and document-sync-and-share SaaS vendors have pushed established vendors toward simpler, more customizable user experiences. IBM's Navigator brings a new, fresh, flexible interface to multiple IBM and third-party repositories, providing both end user configurability and mobile enhancements. HP has initiated a user interface (UI) refresh project to create a coherent, common look and feel across its portfolio as part of its Autonomy integration strategy. OpenText has acquired longtime partner Resonate KT to offer a UI toolkit for customers desiring a flexible designer for application delivery and reporting. M-Files offers an entirely fresh approach to ECM, with a metadata- and search-driven UI rather than the traditional folder and subfolder navigation scheme. Alfresco Software's Alfresco One presents consistent, contextual user interfaces for deployments spanning cloud, mobile, and on-premises, while Perceptive Software continues to focus on its well-received, user-configurable design and application integration tools.

ECM Suites Continue To Evolve Into Platforms For Content Applications

ECM suites continue their evolution into content-centric technologies, as noted in our 2011 Forrester Wave evaluation of ECM vendors.⁴ Several vendors have made acquisitions to fast-track their customers' and partners' abilities to deliver content or process-centric applications. Toolkits and frameworks that allow non-developers (power users or business analysts) to deliver new applications help ECM vendors stay relevant by encouraging faster and simpler application development on top of their repositories. Alfresco Software's acquisition of partner Workdesk adds capabilities for transactional application design, while OpenText's acquisition of Metastorm helps address smart process applications via its Assure add-on. Vendors EMC and Unisys have recommitted to a strong vertical strategy, allocating internal teams to build content applications for vertical markets.

Proprietary Development Languages And APIs Lose Favor

ECM vendors are making it easier for solution providers and customers' in-house development teams to design applications and customize systems. Proprietary languages and application programming interfaces (APIs) are being phased out or repackaged in favor of web services. Eclipse, JavaScript, jQuery, and REST support is on the rise. The use of agile development and deployment approaches is becoming more common for ECM deployments, and the technologies are becoming better suited to meeting this customer need.⁵

Open Source And Open Standards Enable Innovation And Integration

ECM vendors are willing to leverage open source software and open standards to get innovative enhancements out faster than writing the code entirely from scratch. Alfresco Software has been a pioneer in the creation of open source ECM, offering a community edition of its ECM platform, thus attracting developers and solution providers that extend and enhance the product. Apache Lucene/Solr is the go-to search engine choice for ECM vendors as they jettison OEMed search engines from once-private vendors now acquired by competitors. The OASIS content management interoperability services standard (CMIS) has high adoption by the vendors evaluated, especially Alfresco Software, EMC, IBM, Microsoft, Newgen Software Technologies, OpenText, and Xerox. Early adopter end user clients are beginning to place CMIS into their ECM strategies and making it part of their architecture plans.⁶

A Moment In The Sun For ECM In The Cloud

ECM vendors have moved quickly since the 2011 Forrester Wave evaluation to deliver a range of hosted services, private cloud, and public cloud offerings for their core products. Hyland has successfully deployed more than 700 installations of cloud-based offerings, while Wave newcomer M-Files provides one of the few true hybrid offerings. Established vendors such as EMC, HP Autonomy, and OpenText have been able to leverage acquisitions to fast-track their cloud strategies. Microsoft SharePoint Online delivers a multi-tenant offering supporting a broad range of ECM capabilities, though a hybrid deployment with SharePoint Server 2013 is required to search content stored outside of SharePoint online sites or to synchronize directories. Alfresco delivers its ECM platform in multi-tenant SaaS, private, or public cloud and encourage users to test-drive its SaaS offering in a freemium model supporting immediate sign-up and use. ECM clients, however, are still in early stages of cloud adoption, with only 12% of decision-makers reporting use of hybrid, public, or private ECM cloud applications — unchanged from 2011.⁷

Niche Players Continue To Focus On Their Core Competence

Smaller niche ECM vendors focus their capabilities on either industry-specific solutions or a content technology area. Germany-based Saperion targets transactional-content-centric applications by providing archiving, document management, capture, enterprise report management, e-signature, email, and records management functionality. iDatix, a US-based ECM vendor focused on the Southeastern US states, provides solutions focused on transactional content management, enabling two-way application integration with minimal customizations. Cloud-only ECM vendors, e.g., DataServ, SpringCM, and Veeva Systems, give smaller organizations options to on-premises implementations for line-of-business applications and industry solutions. Open source content management platform provider Nuxeo attracts clients and system integrators that require a high degree of extensibility in order to create their own applications, particularly for business content.

ECM VENDOR EVALUATION OVERVIEW

To assess the state of the ECM market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of the top vendors.

Evaluation Criteria: Current Offering, Strategy, And Market Presence

After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria. We evaluated vendors against 48 criteria, which we grouped into three high-level buckets:

- **Current offering.** We assessed ECM technologies on the breadth of the tool set and their extended capabilities for managing content and process. The evaluations took into account three key areas for content management: business, transactional, and foundational. A fourth key use case for content applications — the management of persuasive content — is no longer covered in depth in this evaluation.⁸
- **Strategy.** ECM vendors must show coherent strategies to help organizations align their technologies with the broad information management requirements of their customers and prospects. Vendors must also have an extensive network of partners, systems integrators, and solution providers in order to help customers implement, customize, and optimize their systems. We also examined each vendor's product road map, overall corporate strategy, and partnership activity in order to evaluate its ECM strategy.
- **Market presence.** We evaluated vendors' current customer bases, the size of their ECM product revenue, vendors' overall revenue, and geographic and vertical presence.

Selected Vendors Meet Requirements Of Demanding Enterprise

Forrester included 13 vendors in this assessment: Alfresco Software, EMC, HP Autonomy, Hyland Software, IBM, M-Files, Microsoft, Newgen Software Technologies, OpenText, Oracle, Perceptive Software, Unisys, and Xerox. We ranked Oracle's offering based on our existing knowledge of its ECM products, as this vendor chose not to participate directly in the Forrester Wave evaluation; thus there is no evaluation scorecard for Oracle. Vendors were selected because they displayed the following characteristics (see Figure 2):

- **Functionality breadth.** Each evaluated vendor's ECM offering includes specific and robust functionality for at least one of the following content types: business, transactional, and foundational. Offerings must include most or all of the following: document management, document imaging, records management, digital asset management, and line-of-business applications.

- **Leadership in information management.** Selected vendors are leading providers of information management technology, and many provide relational database management systems, business intelligence (BI), portal, and collaboration. Vendors have shared with Forrester strategic road maps addressing investments in ECM functionality.
- **Proven enterprise-level track record.** Included vendors have a solid existing consumer base among customers with revenues over \$1 billion annually and have proven scalability.
- **Interest from Forrester clients.** Forrester clients ask about the evaluated products within the context of inquiry, advisory, and/or consulting. Many clients have already implemented these solutions to support their information management agendas.

Figure 2 Evaluated Vendors: Product Information And Selection Criteria

Vendor	Product evaluated	Product version evaluated	Version release date
Alfresco Software	Alfresco Enterprise	4.1	September 2012
EMC	EMC Documentum Platform	7	November 2012
HP Autonomy	Autonomy ECM Suite	9.0	January 2013
Hyland Software	OnBase	12	July 2012
IBM	FileNet Content Manager	5.1.0	August 2011
M-Files	M-Files DMS	9.0	September 2012
Microsoft	SharePoint 2013 and SharePoint Online	SharePoint 2013	October 2012
Newgen Software Technologies	Newgen ECM Suite	7.2	April 2012
OpenText	OpenText ECM Suite	10	March 2013
Oracle	Oracle WebCenter Content	11.1.1.7	April 2013
Perceptive Software	Perceptive Content	6.7	July 2012
Unisys	Infolmage	Release r8.2	Q3 2012
Xerox	DocuShare	6.6.1, update 1	May 2013

Vendor selection criteria

Annual revenue: Vendors included in this evaluation have a proven ECM product and generate approximately \$15 million or more in annual revenue.

Core ECM capabilities: The vendor solution must, at a minimum, support the following foundational content management functionalities:

- Basic workflow library services
- Records management and preservation support
- Search
- Metadata management, content types, and taxonomy support
- Robust content security
- Can be deployed on-premises

Experience: Vendors must have significant experience and demonstrable success in the implementation of ECM solutions for enterprise-class organizations. Vendors have a solid enterprise track record, and Forrester clients show interest in these products in the context of inquiry, advisory, and consulting.

Established partner ecosystem: Vendors included in this evaluation will have an established partner ecosystem for the development of repeatable solutions and system implementations.

Source: Forrester Research, Inc.

HP Joins Our Overall Leaders, With Content Areas Splitting The Pack

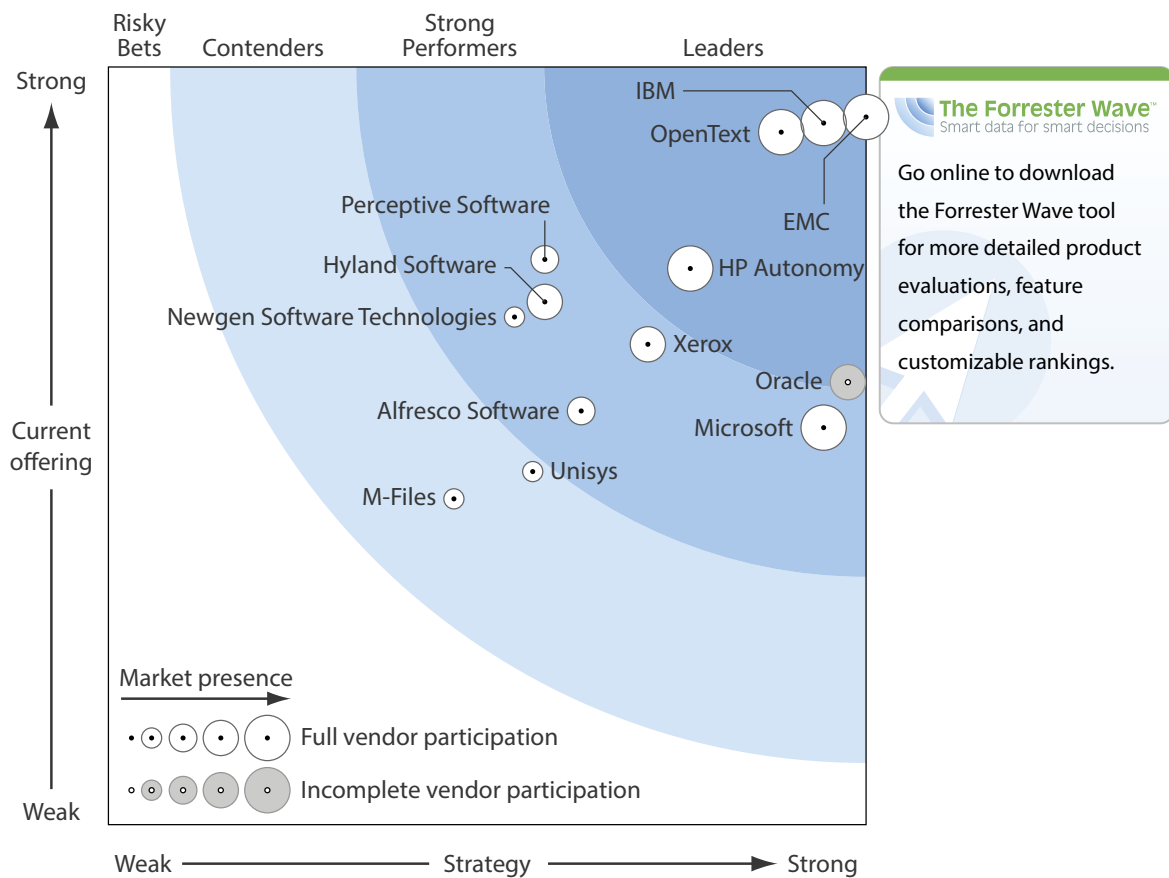
Our evaluation uncovered a segmented market in which (see Figure 3, see Figure 4, and see Figure 5):

- **EMC, IBM, and OpenText continue to lead the pack across all ECM technologies.** Our Leaders each deliver a comprehensive suite of ECM functionality that addresses all aspects of the four ECM technology areas. Their ability to address the wide range of technologies encompassing the content spectrum provides a one-stop shop for ECM functionality from a single vendor.
- **HP's acquisition of Autonomy moves it to a Leader position for overall and business content.** The addition of Autonomy's core ECM capabilities and its focus on eDiscovery, autoclassification, and text analytics enables HP to move into a Leader position for overall and business. HP's lack of imaging and enterprise report management capabilities leaves it as a Strong Performer for the transactional area and holds it back from an overall Leader position.
- **Oracle sits on the border between Leader and Strong Performer categories.** Oracle provides ECM functionality best targeting business content technologies, positioning it as a Leader for the business area. Oracle's positioning as a Strong Performer in the transactional area leaves it straddling the line between Leader and Strong Performer for the overall area.
- **Microsoft continues to hold leadership in business content technologies.** Microsoft's continued ECM support and enhanced eDiscovery capabilities in SharePoint 2013 qualify it to stay in a Leader position for the business area. The general lack of support for imaging and output management technologies leaves Microsoft as a Contender in the transactional area. The lack of balance across all technology areas leaves Microsoft in an overall Strong Performer position.
- **Hyland, Newgen, Perceptive, and Xerox offer broad technologies in multiple ECM areas.** Hyland, Newgen, Perceptive, and Xerox all address a broad set of ECM technology areas (e.g., team collaboration, records management, and mobile computing) to meet business requirements for solutions. Their lack of global enterprise deployments holds these vendors back from becoming Leaders in this evaluation.
- **M-Files and Unisys provide rich functionality with a narrow focus.** M-Files and Unisys deliver ECM solutions targeted at specific technology areas. M-Files focuses on managing quality-related business content governed by external regulatory agencies. Unisys' focus is primarily targeted at the transactional content solutions. These vendors rank as Contenders or Strong Performers in the technologies areas in which they provide their richest set of ECM functionality.

- Alfresco Software continues to gain strides as an alternative to traditionally licensed players.** Alfresco’s focus on foundational and business content provides organizations with an alternative that is often lower cost and faster to deploy when compared with the larger proprietary vendors. Alfresco’s cloud and file/sync share support have fueled its growth in the collaboration market, and records management capabilities have expanded its footprint in the public sector.

This evaluation of the ECM market is intended to be a starting point only. We encourage readers to view detailed product evaluations and adapt the criteria weightings to fit their individual needs through the Forrester Wave Excel-based vendor comparison tool.

Figure 3 Forrester Wave™: Enterprise Content Management: Overall Capabilities, Q3 '13



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Smart data for smart decisions

Go online to download the Forrester Wave tool for more detailed product evaluations, feature comparisons, and customizable rankings.

Source: Forrester Research, Inc.

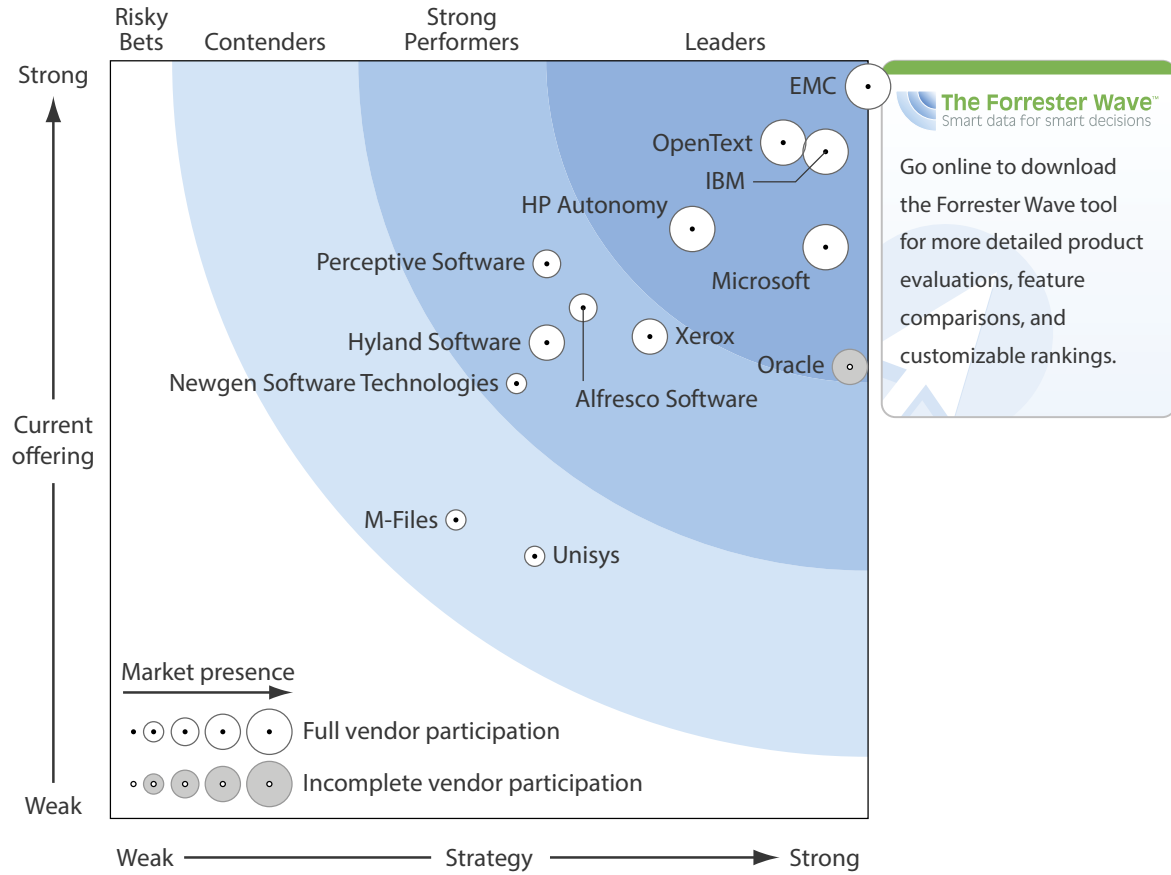
Figure 3 Forrester Wave™: Enterprise Content Management: Overall Capabilities, Q3 '13 (Cont.)

	Forrester's Weighting	Alfresco Software	EMC	HP Autonomy	Hyland Software	IBM	M-Files	Microsoft	Newgen Software Technologies	OpenText	Perceptive Software	Unisys	Xerox
CURRENT OFFERING	50%	2.73	4.67	3.67	3.45	4.63	2.15	2.62	3.35	4.57	3.73	2.33	3.17
Foundational content support	33%	2.60	4.70	4.30	3.15	4.30	2.40	3.10	3.50	4.50	3.50	2.15	3.15
Business content support	33%	3.90	4.80	4.00	3.20	4.60	1.95	4.20	2.55	4.50	3.90	1.65	3.25
Transactional content support	33%	1.70	4.50	2.70	4.00	5.00	2.10	0.55	4.00	4.70	3.80	3.20	3.10
STRATEGY	50%	3.12	5.00	3.84	2.88	4.72	2.28	4.72	2.68	4.44	2.88	2.80	3.56
Strategy	70%	3.00	5.00	4.20	3.00	4.60	1.80	4.60	2.20	4.20	3.00	3.40	3.80
Systems integrators	30%	3.40	5.00	3.00	2.60	5.00	3.40	5.00	3.80	5.00	2.60	1.40	3.00
Licensing	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
MARKET PRESENCE	0%	2.20	4.69	5.00	3.16	5.00	1.65	5.00	1.25	4.39	2.91	1.17	3.60
Revenue	45%	1.00	4.30	5.00	1.35	5.00	0.00	5.00	0.00	3.65	2.35	1.05	3.00
Training	5%	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	3.00	5.00
Market presence	50%	3.00	5.00	5.00	4.60	5.00	2.80	5.00	2.00	5.00	3.20	1.10	4.00
Sales, service, R&D	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

All scores are based on a scale of 0 (weak) to 5 (strong).

Source: Forrester Research, Inc.

Figure 4 Forrester Wave™: Enterprise Content Management: Business Content Capabilities, Q3 '13



Source: Forrester Research, Inc.

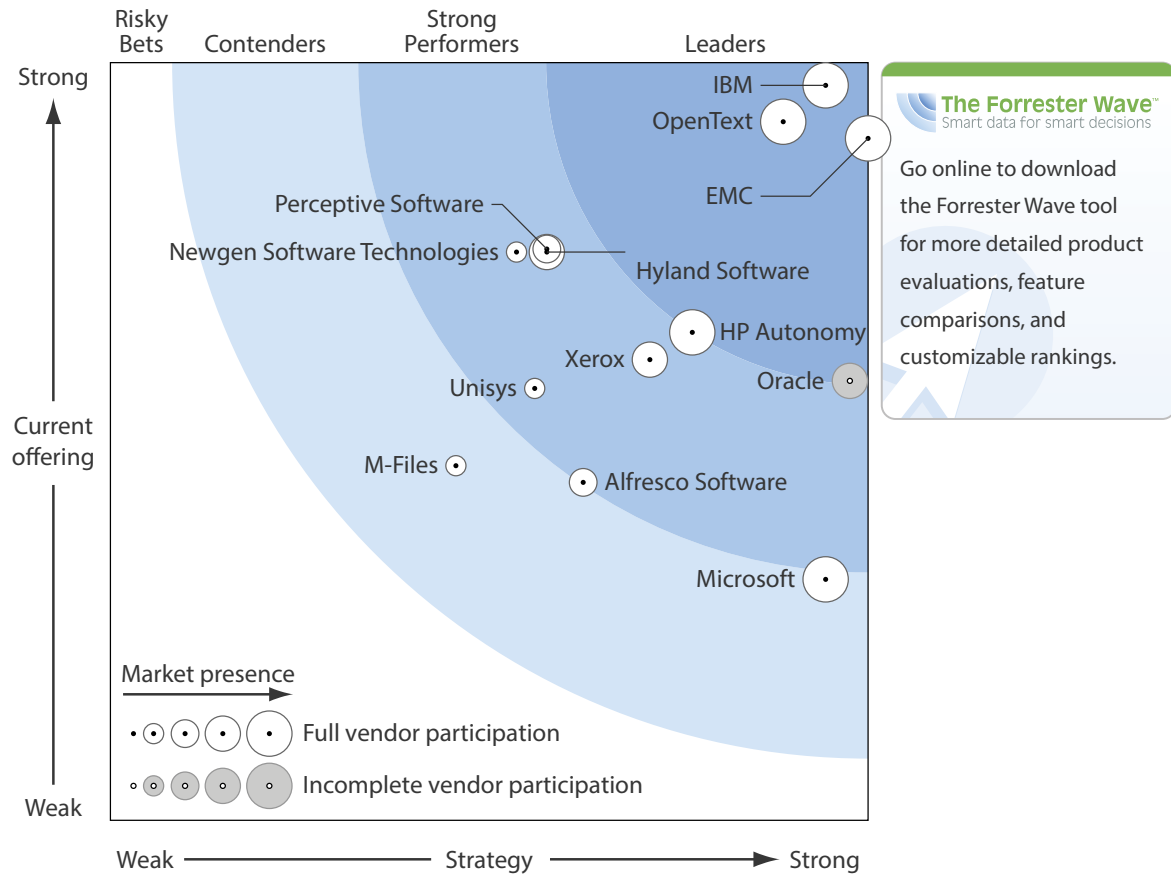
Figure 4 Forrester Wave™: Enterprise Content Management: Business Content Capabilities, Q3 '13 (Cont.)

	Forrester's Weighting	Alfresco Software	EMC	HP Autonomy	Hyland Software	IBM	M-Files	Microsoft	Newgen Software Technologies	OpenText	Perceptive Software	Unisys	Xerox
CURRENT OFFERING	50%	3.37	4.83	3.89	3.14	4.40	1.97	3.77	2.87	4.46	3.66	1.73	3.18
Foundational content support	30%	2.60	4.75	4.40	2.80	4.30	2.40	3.30	3.60	4.40	3.40	1.95	3.15
Business content support	65%	3.90	4.85	3.80	3.15	4.40	1.85	4.20	2.45	4.45	3.75	1.45	3.20
Transactional content support	5%	1.00	5.00	2.00	5.00	5.00	1.00	1.00	4.00	5.00	4.00	4.00	3.00
STRATEGY	50%	3.12	5.00	3.84	2.88	4.72	2.28	4.72	2.68	4.44	2.88	2.80	3.56
Strategy	70%	3.00	5.00	4.20	3.00	4.60	1.80	4.60	2.20	4.20	3.00	3.40	3.80
Systems integrators	30%	3.40	5.00	3.00	2.60	5.00	3.40	5.00	3.80	5.00	2.60	1.40	3.00
Licensing	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
MARKET PRESENCE	0%	2.20	4.69	5.00	3.16	5.00	1.65	5.00	1.25	4.39	2.91	1.17	3.60
Revenue	45%	1.00	4.30	5.00	1.35	5.00	0.00	5.00	0.00	3.65	2.35	1.05	3.00
Training	5%	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	3.00	5.00
Market presence	50%	3.00	5.00	5.00	4.60	5.00	2.80	5.00	2.00	5.00	3.20	1.10	4.00
Sales, service, R&D	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

All scores are based on a scale of 0 (weak) to 5 (strong).

Source: Forrester Research, Inc.

Figure 5 Forrester Wave™: Enterprise Content Management: Transactional Content Capabilities, Q3 '13



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Source: Forrester Research, Inc.

Figure 5 Forrester Wave™: Enterprise Content Management: Transactional Content Capabilities, Q3 '13 (Cont.)

	Forrester's Weighting	Alfresco Software	EMC	HP Autonomy	Hyland Software	IBM	M-Files	Microsoft	Newgen Software Technologies	OpenText	Perceptive Software	Unisys	Xerox
CURRENT OFFERING	50%	2.23	4.50	3.22	3.75	4.85	2.34	1.59	3.75	4.61	3.77	2.85	3.04
Foundational content support	30%	2.55	4.55	3.95	3.20	4.50	2.45	2.55	3.30	4.55	3.35	2.30	2.85
Business content support	10%	4.40	4.30	4.10	3.90	5.00	3.45	4.90	3.60	4.20	4.80	2.35	3.25
Transactional content support	60%	1.70	4.50	2.70	4.00	5.00	2.10	0.55	4.00	4.70	3.80	3.20	3.10
STRATEGY	50%	3.12	5.00	3.84	2.88	4.72	2.28	4.72	2.68	4.44	2.88	2.80	3.56
Strategy	70%	3.00	5.00	4.20	3.00	4.60	1.80	4.60	2.20	4.20	3.00	3.40	3.80
Systems integrators	30%	3.40	5.00	3.00	2.60	5.00	3.40	5.00	3.80	5.00	2.60	1.40	3.00
Licensing	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
MARKET PRESENCE	0%	2.20	4.69	5.00	3.16	5.00	1.65	5.00	1.25	4.39	2.91	1.17	3.60
Revenue	45%	1.00	4.30	5.00	1.35	5.00	0.00	5.00	0.00	3.65	2.35	1.05	3.00
Training	5%	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	3.00	5.00
Market presence	50%	3.00	5.00	5.00	4.60	5.00	2.80	5.00	2.00	5.00	3.20	1.10	4.00
Sales, service, R&D	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

All scores are based on a scale of 0 (weak) to 5 (strong).

Source: Forrester Research, Inc.

VENDOR PROFILES

Leaders

- EMC.** EMC remains a Leader across the overall, business, and transactional ECM segments. An established vendor with a strong product set, EMC continues to extend its offering via acquisitions and organic R&D in areas such as secure file sync and share (Syncplicity), eDiscovery (Kazeon), content migration, automated classification, and text analytics. EMC has renewed its commitment to serving vertical markets, offering a broad range of both business

and transactional content applications directly and via its partner channel. EMC can deliver policy-driven governance to content, even outside of its records management site, via its Documentum Retention Policy Services (RPS). EMC has been able to accelerate its innovation pace by leveraging established open source projects, including Apache Lucene as a foundation for its xPlore search engine and MongoDB as part of its Enterprise Migration Appliance (EMA). EMC's Documentum Mobile support is focused on iOS, a limitation for enterprises needing to support multiple mobile platforms as part of a bring-your-own-device (BYOD) initiative. Other mobile platform users, however, can access Documentum content with Syncplicity via a Documentum connector. Documentum Mobile permits users to perform common ECM tasks such as search, view, collaborate, or complete tasks.

- **IBM.** IBM is positioned as a Leader in all segments. Its access to high-quality research has provided continual enhancements to the ECM suite. IBM's comprehensive ECM suite provides a wide array of functionality that supports document management, business process management, case management, content analytics, imaging, records management, and information governance. IBM continues to deliver high-value solutions for IT, line-of-business, and legal as well as targeted vertical industry apps such as case management, enterprise fraud, and patient care and insights. IBM's weakness remains in the complexity of implementation and difficulty in scaling downward in scope and performance.
- **OpenText.** OpenText ranks as a Leader across all segments. OpenText continues to remain the largest pure-play platform ECM vendor, with its ongoing acquisition strategy helping extend its ECM capabilities. BPM capabilities were ramped up with the acquisitions of both Global360 and Metastorm, while the EasyLink acquisition accelerated its cloud strategy with the addition of new data centers around the globe. OpenText has developed a go-to-market strategy focused on enterprise information management (EIM) to unify its set of ECM products. The OpenText EIM strategy is focused on the unifying the content aspects of EIM rather than the complete EIM vision of harmonizing data and content within an organization.⁹ OpenText's strategy is focused on collecting these individual products into a solution that delivers a defined measurable result. OpenText must succeed in the execution of the EIM strategy to demonstrate its product integration and interoperability to its current customer base.
- **HP.** HP moves into the Leader category for overall and business ECM use cases following its acquisition of Autonomy in 2011. HP ranks as a Strong Performer for the transactional area. HP has particular strengths in the areas of records management, information governance, and eDiscovery, drawing on solid technology from both the HP-Trim and Autonomy product teams. HP was early to support the capture and analytics of both internal and external social media content sources but itself offers fairly basic collaboration and team workspace capabilities as part of its ECM offering. The HP Flow CM product allows secure file-sharing with external or internal collaborators and is connected to the core ECM repository through LinkSite.

Customer communication and engagement remains inconsistent at HP, with Forrester fielding regular inquiry calls with clients unsure about the future of the products they've deployed. HP Autonomy must work to assure clients that their investments in acquired products remain viable and must share its plans for road maps and integration strategies.

- **Oracle.** Oracle borders on the line between Leader and Strong Performer, being rated as a Leader for the business area and a Strong Performer for transactional. Oracle WebCenter Content is made available to all core Oracle products, thus providing ECM functionality to Oracle's business applications, such as PeopleSoft, E-Business Suite, and Siebel. Oracle's ability to surface ECM functionality in business applications provides organizations with the ability to content-enable applications to streamline business processes. Oracle continues to expand ECM functionality to provide a better bridge for integrating content into core business applications. Its recent release was focused on user experience, capture, SharePoint integration, and ECM cloud offerings. Oracle's success and differentiation is partially dependent on its ability to deploy WebCenter Content to its business application customers.

Strong Performers

- **Microsoft.** Microsoft remains a leader in business content management and on the cusp between Strong Performer and Contender for transactional content management. SharePoint continues to lead the ECM market in overall penetration. Microsoft's newest version, SharePoint 2013, is focused on enhancing eDiscovery capabilities and extending the functionality in the cloud offering. In SharePoint 2013, the capability gap between ECM functions on-premises and in the cloud is narrowed substantially. Record centers are available in the cloud; eDiscovery is available in the cloud; and Microsoft's go-forward strategy is to deliver new capabilities in the cloud first. Following on the heels of this cloud-first strategy is Microsoft's new mobile support for iOS devices. Central to its new offerings is cloud-delivered support for Office applications. Microsoft's cloud-first strategy for SharePoint and Office applications may actually be a limitation, as our recent ECM survey showed limited movement to a cloud-based ECM deployment.
- **Xerox.** Xerox ranks as a Strong Performer in all three areas: overall, business, and transactional. Xerox provides purpose-built applications, both on-premises and cloud-based, for industry-specific business processes that emphasize capture, analytics, ECM, services, and business process outsourcing (BPO) — delivered as both on-premises and SaaS-based solutions. Xerox also leverages ACS product Xerox transitional content manager (XTCM) to deliver high-volume transactional CM functionality. One of Xerox's strengths is its scalability and integration with office devices such as printers, scanners, and multifunction peripherals (MFPs) to provide simple, low-volume imaging capability. Xerox leverages this strength to engage the hardware sales force in the selling of ECM solutions. DocuShare's weakness is in being somewhat buried in the larger Xerox, which splits attention between the general ECM market and internal requirements and opportunities.

- **Perceptive Software.** Perceptive ranks as a Strong Performer in the overall, business, and transactional segments, with its strongest score in the transactional segment. Perceptive leverages its recent acquisitions, including Brainware (capture and analytics), Pallas Athena (BPM and case management), and the Twistage platform (rich media services), to support transactional applications and deliver vertical solutions to a particular set of industries (e.g., healthcare, public sector, higher education, and financial services). Perceptive's focus on non-programmatic integration capabilities is particularly impressive, as it takes the complexity out of customizing the product. Perceptive will benefit greatly as the Lexmark software unit, taking advantage of an extended global reach via the broader Lexmark hardware, software, and services offerings, to continue to evolve in scope and market share.
- **Hyland Software.** Hyland is a Strong Performer in the transactional and business segments due to the well-rounded functionality of its flagship platform, OnBase. Hyland continues to challenge the traditional ECM suite vendors with its broad transactional ECM capabilities. The ability to scale OnBase upward and downward in scope and sophistication make it a fit for both midsized and large enterprises. Hyland develops its core ECM capabilities organically on the OnBase platform but will also acquire complementary products for industry- and process-specific functionality. While OnBase is applicable horizontally, Hyland primarily sells it in particular verticals with integrated document and process management requirements (e.g. healthcare, government, financial services, and insurance). OnBase features strong out-of-the-box integration capabilities with both lines-of-business and productivity applications (particularly Microsoft's SharePoint and Outlook). Hyland is pushing hard in emerging areas such as dynamic case management as well as cloud and mobile delivery of process applications. However, Hyland needs to push harder in emerging thought leadership areas, such as dynamic case management, that deliver high-value solutions to its end users.
- **Newgen Software Technologies.** Newgen ranks as a Strong Performer in all segments, with a strength in the transactional area supported by robust mobile with image processing on the mobile device. Newgen's products deliver integrated ECM and BPM capabilities into a comprehensive suite. Newgen's primary success has been in India, the Middle East, Africa, and Asia Pacific regions. Newgen couples its product functionality with local, low-cost development resources. Newgen must focus on enhancing its business content management solutions to more effectively compete in the North America market against more-established ECM vendors.
- **Alfresco Software.** Alfresco continues to be a Strong Performer in the overall and business segments and is positioned to shift from Contender to Strong Performer in the transactional segment. Offering both an open source community edition and fully supported enterprise edition, Alfresco's ECM platform is suitable for enterprise or departmental deployments. The company's commitment to open standards, APIs, and its developer community makes it a strong platform for integrators and solution providers to use for a range of vertical and horizontal solutions. The acquisition of solution provider WeWebU has strengthened Alfresco's

offerings in the transactional segment, allowing customers and partners to build a broad range of content applications with more configuration and less coding. Alfresco is an innovator with its mobile and cloud strategy, offering hybrid options for customers that require both on-premises and cloud repository support. Enhancements to the Records Management module have improved its usability, though RM is not available in the Alfresco SaaS offering.

Contenders

- **Unisys.** Unisys ranks as a Strong Performer for overall and transactional segments and a Contender for the business segment. Unisys is a focused transactional vendor targeting the government and financial industry sectors. InfoImage's strength lies in its core transactional functionality (such as document imaging, business process management, and line-of-business application) and SharePoint integration. Unisys is emerging from a period during which it was primarily focused on system integration services for a third-party ECM product and is now refocusing on the development of its own ECM product. The focus on InfoImage will take time to bolster its product functionality, i.e., the business content technology areas, to compete against more-established transactional ECM vendors.
- **M-Files.** M-Files is a Contender across all segments. M-Files' metadata-driven architecture provides for a flexible, folderless navigation, giving end users a versatile approach for grouping documents. M-Files metadata design has enabled it to lead the way with cloud-based computing, providing complete functionality and transparency between on-premises and cloud-based implementations. M-Files provides the ability to replicate data across distributed repositories and deployment types based on metadata. M-Files' deficiencies in both foundational and business content management capabilities (e.g., eDiscovery, repository integration, collaboration, and text analytics) will hinder its ability to extend its penetration into the compliance market and compete with more-established vendors.

SUPPLEMENTAL MATERIAL

Online Resource

The online versions of Figures 3, 4, and 5 are Excel-based vendor comparison tools that provide detailed product evaluations and customizable rankings.

Data Sources Used In This Forrester Wave

Forrester used a combination of three data sources to assess the strengths and weaknesses of each solution:

- **Vendor surveys.** Forrester surveyed vendors on their capabilities as they relate to the evaluation criteria. Once we analyzed the completed vendor surveys, we conducted vendor calls where necessary to gather details of vendor qualifications.
- **Product demos.** We asked vendors to conduct demonstrations of their product's functionality. We used findings from these product demos to validate details of each vendor's product capabilities.
- **Customer reference calls.** To validate product and vendor qualifications, Forrester also conducted reference calls with two of each vendor's current customers.

The Forrester Wave Methodology

We conduct primary research to develop a list of vendors that meet our criteria to be evaluated in this market. From that initial pool of vendors, we then narrow our final list. We choose these vendors based on: 1) product fit; 2) customer success; and 3) Forrester client demand. We eliminate vendors that have limited customer references and products that don't fit the scope of our evaluation.

After examining past research, user need assessments, and vendor and expert interviews, we develop the initial evaluation criteria. To evaluate the vendors and their products against our set of criteria, we gather details of product qualifications through a combination of lab evaluations, questionnaires, demos, and/or discussions with client references. We send evaluations to the vendors for their review, and we adjust the evaluations to provide the most accurate view of vendor offerings and strategies.

We set default weightings to reflect our analysis of the needs of large user companies — and/or other scenarios as outlined in the Forrester Wave document — and then score the vendors based on a clearly defined scale. These default weightings are intended only as a starting point, and we encourage readers to adapt the weightings to fit their individual needs through the Excel-based tool. The final scores generate the graphical depiction of the market based on current offering, strategy, and market presence. Forrester intends to update vendor evaluations regularly as product capabilities and vendor strategies evolve. For more information on the methodology that every Forrester Wave follows, go to <http://www.forrester.com/marketing/policies/forrester-wave-methodology.html>.

Integrity Policy

All of Forrester's research, including Waves, is conducted according to our Integrity Policy. For more information, go to <http://www.forrester.com/marketing/policies/integrity-policy.html>.

Survey Methodology

Forrester's May 2013 Global Enterprise Content Management Online Survey was fielded to 179 IT professionals. Forrester fielded this survey from April to May 2013. Respondent incentives included a summary of the survey results. Exact sample sizes are provided in this report on a question-by-question basis.

This survey used a self-selected group of respondents, Forrester contacts interested in enterprise architecture and content management and is therefore not random. This data is not guaranteed to be representative of the population, and, unless otherwise noted, statistical data is intended to be used for descriptive and not inferential purposes. While nonrandom, the survey is still a valuable tool for understanding where users are today and where the industry is headed.

ENDNOTES

- ¹ Source: May 2013 Global Enterprise Content Management Online Survey.
- ² In this report, we point out seven common traps that we see CIOs falling into, including virtual desktop infrastructure (VDI), web-style architectures, and locked-down devices, and we suggest mobile-first alternatives to each one. See the January 29, 2013, "[Seven Mobile Engagement Pitfalls To Avoid](#)" report.
- ³ To learn more about continuous improvement techniques for ECM, see the July 12, 2013, "[Improve ECM Satisfaction Levels Through Agility, Analytics, And Engagement](#)" report.
- ⁴ In Forrester's 66-criteria evaluation of enterprise content management (ECM) vendors, we found that our Leaders have abilities to address all four content-centric technology areas. See the November 1, 2011, "[The Forrester Wave™: Enterprise Content Management, Q4 2011](#)" report.
- ⁵ Twenty-four percent of surveyed ECM decision-makers reported that they use an agile methodology for ECM deployment, while 39% use both agile and waterfall. Source: May 2013 Global Enterprise Content Management Online Survey.
- ⁶ Thirteen percent of surveyed ECM decision-makers report that their ECM strategy is grounded in an interoperability standard, such as CMIS, when selecting products. Source: May 2013 Global Enterprise Content Management Online Survey.
- ⁷ Source: May 2013 Global Enterprise Content Management Online Survey; October 2011 Global Enterprise Content Management Online Survey.
- ⁸ For more information on web content management, see the April 8, 2013, "[The Forrester Wave™: Web Content Management For Digital Customer Experience, Q2 2013](#)" report.
- ⁹ For more information on enterprise information management, see the August 27, 2013, "[The Enterprise Information Management Barbell Strengthens Your Information Value](#)" report.

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A global research and advisory firm, Forrester inspires leaders, informs better decisions, and helps the world's top companies turn the complexity of change into business advantage. Our research-based insight and objective advice enable IT professionals to lead more successfully within IT and extend their impact beyond the traditional IT organization. Tailored to your individual role, our resources allow you to focus on important business issues — margin, speed, growth — first, technology second.

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