

November 1, 2011

The Forrester Wave™: Enterprise Content Management, Q4 2011

by Alan Weintraub

for Content & Collaboration Professionals

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EMC, IBM, OpenText, And Oracle Lead, With Microsoft Close Behind

by Alan Weintraub

with Stephen Powers and Anjali Yakkundi

EXECUTIVE SUMMARY

In Forrester's 66-criteria evaluation of enterprise content management (ECM) vendors, we found that EMC, IBM, OpenText, and Oracle lead the pack because of their abilities to address all four content-centric technology areas. Microsoft challenges the leaders with enhanced capabilities in business, foundational, and persuasive content. Strong Performer Hyland Software strengthens its position by enhancing its business and foundational capabilities to complement its traditional image and archive focus. Strong Performers HP and Xerox find success by targeting business and foundational content, while Strong Performer Perceptive Software targets business and transactional content. Contender Allen Systems Group (ASG) has found success by focusing on transactional content, and Contender Alfresco Software continues to strengthen its ECM functionality by focusing on business and foundational content.

TABLE OF CONTENTS

- 2 **Say Goodbye To ECM Suites; Content-Centric Technologies Are ECM's Future**
- 3 **Role Players Put Pressure On The Traditional Heavyweights**
- 5 **ECM Vendor Evaluation Overview**
 - Evaluation Criteria: Current Offering, Strategy, And Market Presence
 - Selected Vendors Are True Enterprise-Class Solutions
- 7 **The Four Horsemen Lead While Role Players Address Specific Content Areas**
- 16 **Vendor Profiles**
- 20 **Supplemental Material**

NOTES & RESOURCES

Forrester evaluated 12 products and 36 user companies.

Related Research Documents

["The Forrester Wave™: Web Content Management For Online Customer Experience, Q3 2011"](#)
July 13, 2011

["Plan Your ECM Strategy For Business, Persuasive, Transactional, And Foundational Needs"](#)
April 14, 2011

SAY GOODBYE TO ECM SUITES; CONTENT-CENTRIC TECHNOLOGIES ARE ECM'S FUTURE

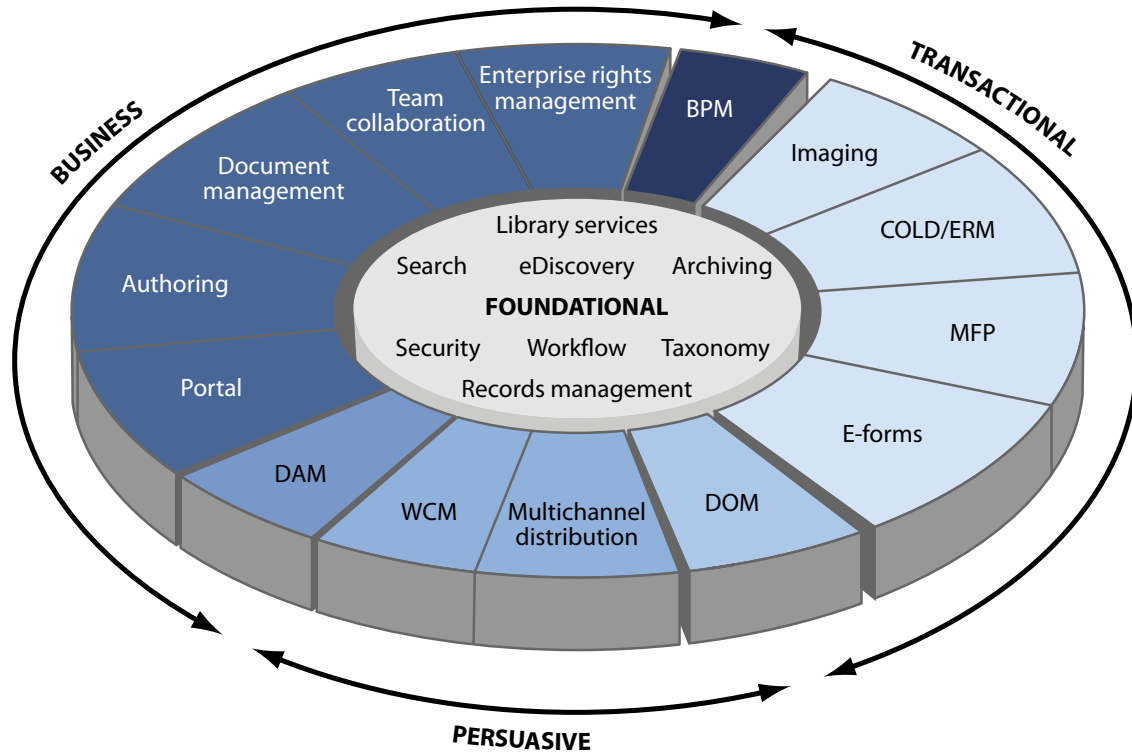
Organizations continue to grapple with an explosion of unstructured content.¹ In addition to the sheer amount of content, the types of content are becoming increasingly diverse and include: documents, scanned images, web content, rich media, email, corporate records, blogs, wikis, e-forms, audio, and video. Each content type comes with its own editing and workflow requirements, and often regulatory and compliance pressures, making managing content that much more complicated and expensive. At the same time, information workers still demand simple and easy-to-use content management tools.

Stuck in the middle of these complex content management issues, few organizations hold onto the once highly touted ECM ideal: an ECM suite from a single vendor that sits atop a unified content repository. For many, a one-size-fits-all ECM solution is no longer relevant or feasible and instead they look to ECM technologies to solve specific business needs. These organizations have begun to move to a more content-centric approach, as they look for different solutions to manage specific types of content.

Forrester divides the technologies used to support these sets of content types into four areas: foundational, business, transactional, and persuasive (see Figure 1).²

- **Foundational ECM provides basic content management functionality.** Foundational content technologies deliver a core set technologies. These technologies include library services, basic workflow, search, and records management and are common across most ECM solutions.
- **Business ECM drives the day-to-day workplace experience.** Business content technologies provide the capabilities that enable workers to perform their day-to-day tasks and collaborate with their colleagues. These technologies include compound document management, enterprise rights management, and team collaboration.
- **Transactional ECM drives back-office processes.** Transactional content technologies support the processes that integrate content with back-office applications. Imaging, document output management, and business process management form the backbone of the transactional content technologies.
- **Persuasive ECM supports content that influences external audience behavior.** Persuasive content technologies deliver content that supports multichannel marketing, lead generation, and customer self-service. Examples of persuasive ECM include web content management, digital asset management, and document output for customer communications management.

Figure 1 The ECM Spectrum: Understanding The Content Types And The Technologies



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Source: Forrester Research, Inc.

ROLE PLAYERS PUT PRESSURE ON THE TRADITIONAL HEAVYWEIGHTS

A few key players — IBM, EMC, OpenText, and Oracle — have traditionally dominated the ECM market. But the tides have begun to turn toward a set of role players that focus on certain areas of the ECM spectrum rather than the whole thing. Organizations develop their ECM strategies geared toward implementing specific content-related applications (e.g., invoice processing, contract management, or quality assurance). This application-specific strategy is the driving factor that is encouraging vendors still focused on a suite approach to become more focused on content technologies.

Microsoft SharePoint’s strategy of “ECM for the masses” has also forced ECM vendors to become increasingly more content-centric. CIOs already have tight budgets and will become reluctant to source additional ECM technology if SharePoint can suffice. As such, other vendors have begun to gravitate toward supporting specific content sets in order to differentiate themselves from Microsoft and other heavy hitters.

The fracturing of the ECM market has led to a host of players, which include:

- **Traditional ECM suite vendors.** Traditional suites players include the heavyweights: EMC, IBM, OpenText, and Oracle. They provide end-to-end ECM offerings that manage all four content types: business, transactional, persuasive, and foundational. These suites generally are complex and heavy solutions that require significant investment of resources. However, the upside is that they offer a single platform. While some organizations have turned away from the suite approach, the traditional players still do them well and offer attractive packages to enterprise-level consumers.
- **Open source solutions.** Both Alfresco and Nuxeo offer ECM capabilities that address foundational and business content technologies. Alfresco leads Nuxeo in client implementations and functionality. While both vendors offer extensive ECM functionality, Alfresco adds team and project collaboration capabilities including blogs, wikis, calendars, data lists, and discussion threads. Other vendors — such as Drupal and DotNetNuke — have a greater focus on supporting online persuasive initiatives.
- **Content-focused vendors.** These vendors tend to be the David to the traditional ECM suites' Goliath by focusing on specific content technologies instead of trying to be a one-size-fits-all solution. Vendors like Alfresco and Xerox have chosen to focus on managing business content, while ASG, Laserfiche, and Perceptive focus on transactional content. Hyland epitomizes the role of David as it takes on the ECM suite vendors: It initially focused on transactional content but now has broadened to include both business and foundational content. A host of players — including the traditional ECM suite vendors — focus on web content management (WCM) and digital asset management (DAM) solutions in support of persuasive content.³
- **Cloud vendors.** Organizations are looking to the cloud for ways to reduce initial startup costs and streamline implementations. Some companies resisted moving ECM solutions to a cloud environment due to security, integration, and customization concerns. They asked vendors to prove that their solutions were secure and provided all the functionality and performance of an on-premises ECM implementation. Three vendors have emerged as cloud-only vendors: KnowledgeTree, SpringCM, and Veeva Systems. KnowledgeTree focuses on business content, while SpringCM focuses on transactional content. Veeva recently launched a cloud offering to service the regulatory requirements of the life sciences industry.
- **Industry-specific players.** Many vendors choose to focus on a specific vertical. For example, the legal industry provides a fertile ground for ECM products such as Autonomy's iManage, NetDocuments, and OpenText's eDocs. Other verticals that specific ECM vendors target include healthcare and higher education. Both Hyland and Perceptive create specific solutions that address the challenges of these markets, including predefined integrations with the leading operational systems.

- **European vendors.** An array of European vendors focus on regional markets. Ever Team, covering France, Spain, and the Middle East, supports business and transactional content-centric applications. Germany-based Saperion targets transactional-content-centric applications by providing archiving, document management, capture, COLD, e-signature, email, and records management functionality. (Saperion's attempt to move into the North American market with SAP integration support has only been moderately successful.)

ECM VENDOR EVALUATION OVERVIEW

To assess the state of the ECM market and see how the vendors stack up against one another, Forrester evaluated the strengths and weaknesses of top ECM vendors (see Figure 2).

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 66 criteria, which we grouped into three high-level buckets:

- **Current offering.** We focused on ECM tool breadth and extended capabilities for managing content. The evaluations took into account the four ECM technology areas: business, transactional, persuasive, and foundational. Persuasive content support is evaluated in more depth in "The Forrester Wave™: Web Content Management For Online Customer Experience, Q3 2011."⁴
- **Strategy.** ECM vendors must show coherent strategies that help organizations align ECM technologies with overall information management needs. Vendors also must have an extensive network of system integrators and ISVs in order to ease the often-painful implementation process. We also examined vendors' product road maps, corporate strategy, and partnership activity in order to evaluate strategy.
- **Market presence.** We evaluated vendors' current installed bases, the size of the ECM product revenue, vendors' overall revenue, and geographic presence.

Selected Vendors Are True Enterprise-Class Solutions

Forrester included 12 vendors in the assessment: Alfresco, ASG, EMC, HP, Hyland Software, IBM, Laserfiche, Microsoft, OpenText, Oracle, Perceptive, and Xerox. Vendors were selected because they each displayed the following:

- **Functionality breadth.** Evaluated vendors' ECM offering includes specific and robust functionality for at least one of the following content types: business, persuasive, transactional, and/or foundational. Offerings must include most or all of the following: document

management, document imaging, records management, web content management, digital asset management, and document output for customer communications management.

- **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 having revenues over \$1 billion annually and have proven scalability. These vendors typically have well over \$25 million in revenue.
- **Interest from Forrester clients.** Forrester clients continue to 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 agenda.

Figure 2 Evaluated Vendors: Product Information And Selection Criteria

Vendor	Product evaluated	Product version evaluated	Version release date
Alfresco Software	Alfresco Enterprise Edition 3.4	3.4	January 2011
ASG	ASG-ViewDirect Suite	*	*
EMC	Documentum	*	*
HP	HP Trim	7.1	March 2011
Hyland Software	OnBase	10	August 2010
IBM	IBM ECM Suite	5.0.0	December 2010
Laserfiche	Laserfiche Rio	8.2.1	May 2011
Microsoft	Microsoft SharePoint Server 2010	4	May 2010
OpenText	OpenText ECM Suite	2010	September 2010
Oracle	Oracle WebCenter	11gR1	May 2011
Perceptive Software	ImageNow	6.6	February 2011
Xerox	DocuShare	6.5.3	May 2010

Vendor selection criteria

Vendor's ECM suite offers specific and robust functionality for at least one of the following content types: business, persuasive, transactional, and/or foundational.

Vendor is a leading provider of information management technology.

Vendor has a solid enterprise track record, and Forrester clients show interest in these products in the context of inquiry, advisory, and consulting.

*Multiple components with different product version numbers and release dates

Source: Forrester Research, Inc.

THE FOUR HORSEMEN LEAD WHILE ROLE PLAYERS ADDRESS SPECIFIC CONTENT AREAS

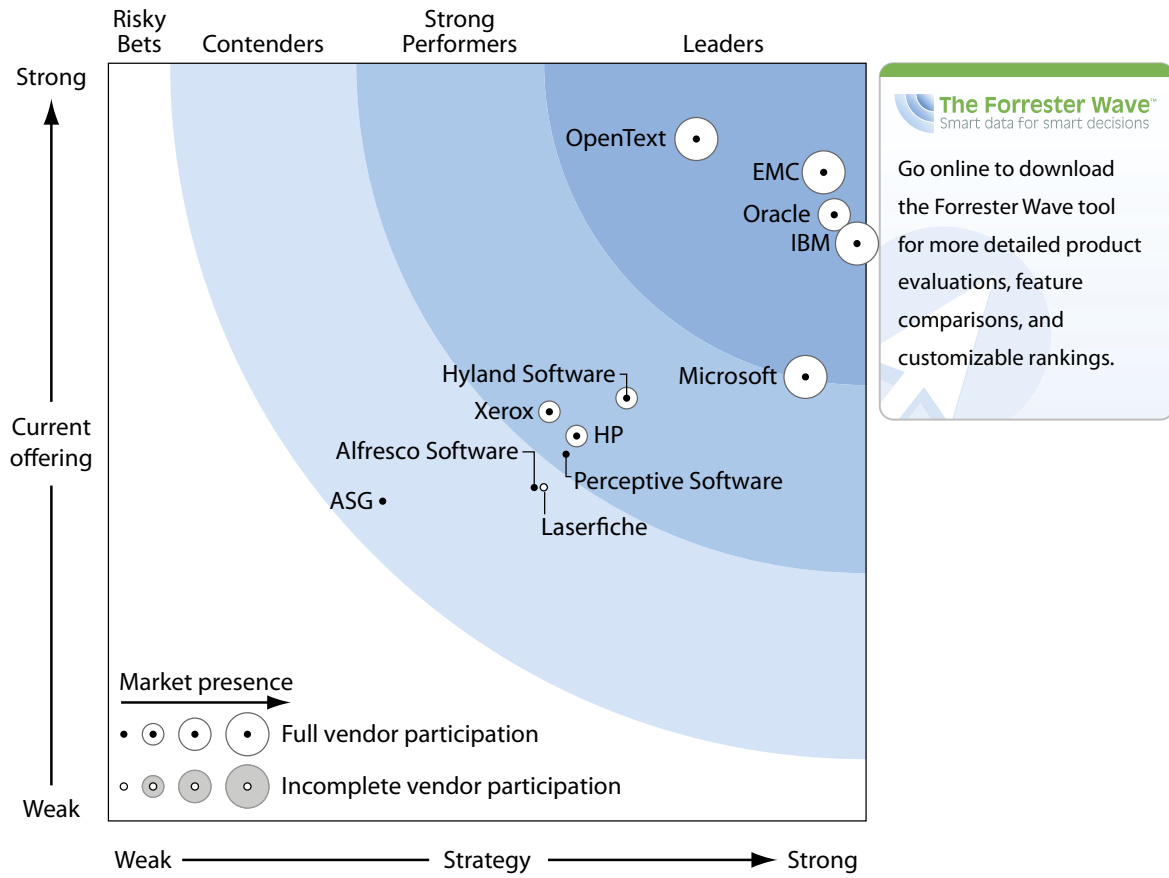
Our evaluation uncovered a segmented market in which (see Figure 3, see Figure 4, see Figure 5, and see Figure 6):

- **EMC, IBM, OpenText, and Oracle continue to lead the pack across all ECM technologies.**
 The four horsemen of ECM continue to 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.

- **Microsoft continues to gain on the four horsemen.** Microsoft has extended its ECM functionality in SharePoint 2010, enabling it to move into a Leader position in two of the ECM technology areas: foundational and business. The general lack of support for the imaging and output management technologies leaves Microsoft as a Contender in the transactional area. This, coupled with still maturing web content management and digital asset management capabilities, gives Microsoft an overall Strong Performer position.
- **Hyland broadens its offering to address multiple ECM technology areas.** Hyland continues to enhance its ECM functionality to address multiple technology areas (e.g., team collaboration, records management, and mobile computing). But Hyland's lack of support for persuasive technologies and global enterprise deployments holds it back from becoming a Leader in this evaluation.
- **ASG, HP, Laserfiche, Perceptive, and Xerox provide rich functionality with a narrow focus.** ASG, HP, Laserfiche, Perceptive, and Xerox deliver ECM solutions that offer capabilities targeted at specific technology areas. These vendors rank as Contenders or Strong Performers in the technologies areas in which they provide their richest set of ECM functionality. Their functionality in these technology areas gives them their highest scores for their current offering.
- **Open-source-based Alfresco continues to be an alternative to proprietary players.** Alfresco's focus on foundational and business content provides organizations with a low-cost alternative to the larger proprietary vendors. Alfresco's continued development in the foundational area makes it relevant to enterprises.

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, Q4 '11 Overall



The Forrester Wave™
 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.

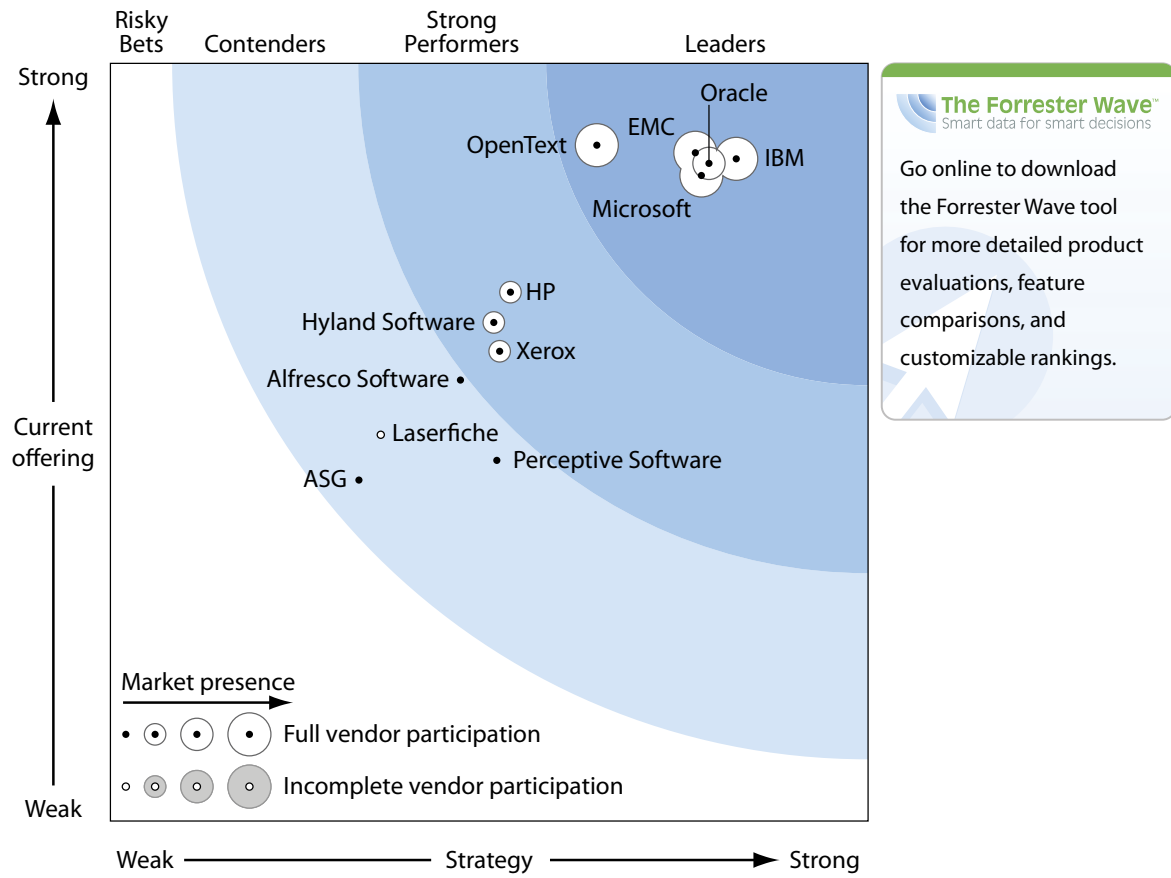
Figure 3 Forrester Wave™: Enterprise Content Management, Q4 '11 Overall (Cont.)

	Forrester's Weighting	Alfresco Software	ASG	EMC	HP	Hyland Software	IBM	Microsoft	OpenText	Oracle	Perceptive Software	Xerox
CURRENT OFFERING	50%	2.20	2.11	4.28	2.54	2.79	3.81	2.93	4.50	4.00	2.42	2.70
Foundational content support	20%	3.00	2.24	4.22	3.19	3.34	4.36	3.87	4.60	4.21	2.29	3.21
Business content support	20%	2.20	0.80	4.20	2.00	2.20	4.20	3.80	4.20	3.60	2.40	2.00
Transactional content support	20%	0.40	3.40	4.80	2.80	4.20	4.20	0.80	4.80	3.60	3.60	2.40
Persuasive content support	20%	2.20	1.20	3.40	1.60	1.20	2.40	2.40	4.60	4.00	1.20	2.80
Core capability architecture	20%	3.20	2.90	4.80	3.10	3.00	3.90	3.80	4.30	4.60	2.60	3.10
STRATEGY	50%	2.81	1.81	4.72	3.09	3.42	4.94	4.60	3.88	4.79	3.02	2.91
Product strategy	70%	2.60	1.80	4.60	3.00	3.80	5.00	4.60	3.40	5.00	2.60	2.60
Whole solution strategy	25%	3.70	2.20	5.00	3.70	2.90	5.00	5.00	5.00	4.40	4.30	3.60
Product packaging strategy	5%	1.25	0.00	5.00	1.25	0.75	3.75	2.50	5.00	3.75	2.50	3.75
Licensing and pricing	0%	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%	1.95	1.60	4.75	2.45	2.50	4.95	4.91	4.25	3.27	1.80	2.65
Company financials	50%	0.80	1.20	4.60	1.80	1.20	5.00	5.00	3.80	2.40	1.00	1.40
Training	5%	4.00	2.00	4.00	2.25	3.75	4.00	5.00	3.75	3.50	0.75	3.00
ECM customer base	45%	3.00	2.00	5.00	3.20	3.80	5.00	4.80	4.80	4.20	2.80	4.00
Geographic presence	0%	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, Q4 '11 Foundational



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Source: Forrester Research, Inc.

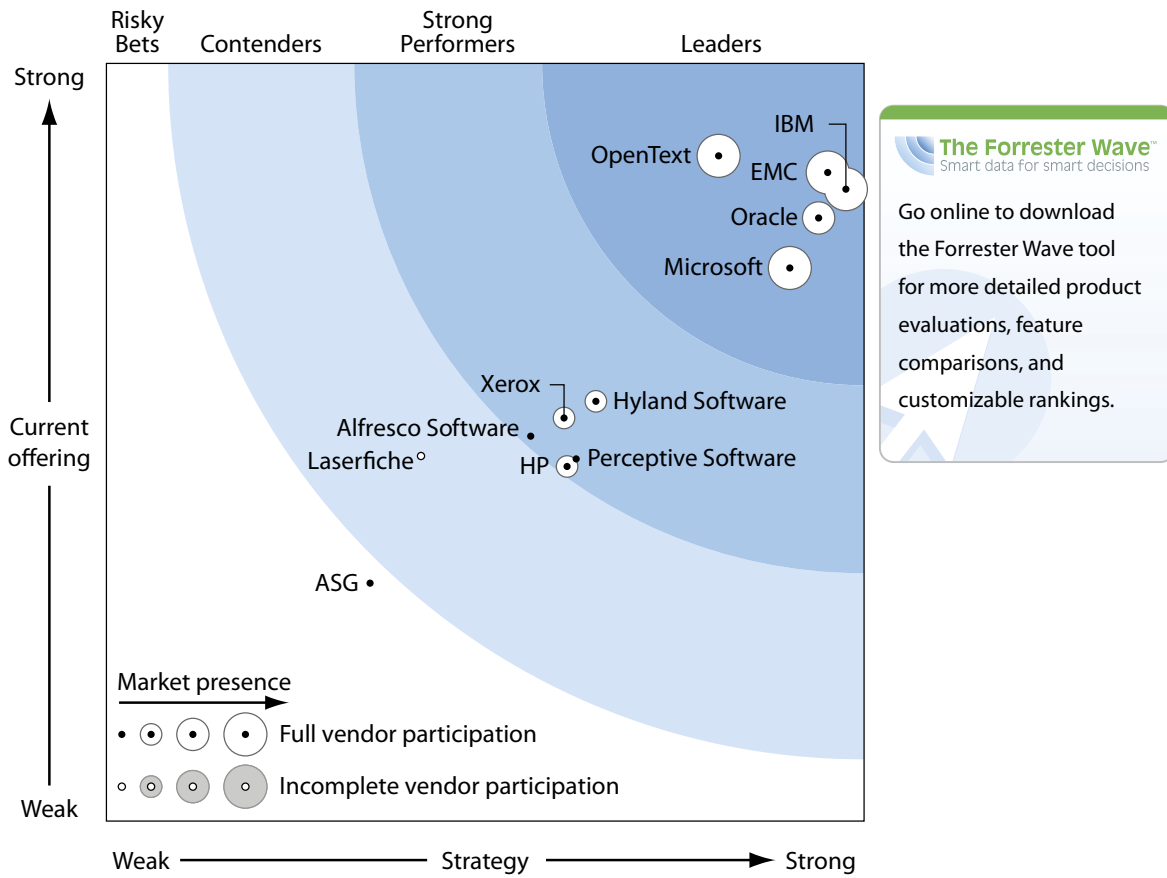
Figure 4 Forrester Wave™: Enterprise Content Management, Q4 '11 Foundational (Cont.)

	Forrester's Weighting	Alfresco Software	ASG	EMC	HP	Hyland Software	IBM	Microsoft	OpenText	Oracle	Perceptive Software	Xerox
CURRENT OFFERING	50%	2.91	2.25	4.41	3.49	3.29	4.37	4.26	4.46	4.34	2.38	3.10
Foundational content support	80%	3.28	2.58	4.46	3.46	3.47	4.48	4.08	4.53	4.46	2.47	3.36
Business content support	10%	1.40	0.20	3.40	3.00	3.00	5.00	5.00	3.40	3.40	3.40	3.40
Transactional content support	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Persuasive content support	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Core capability architecture	10%	1.50	1.70	5.00	4.30	2.10	2.90	5.00	5.00	4.30	0.70	0.70
STRATEGY	50%	2.31	1.64	3.86	2.64	2.53	4.13	3.90	3.21	3.95	2.55	2.57
Product strategy	65%	1.75	1.50	3.25	2.25	2.50	3.75	3.50	2.25	3.75	1.75	2.00
Whole solution strategy	30%	3.70	2.20	5.00	3.70	2.90	5.00	5.00	5.00	4.40	4.30	3.60
Product packaging strategy	5%	1.25	0.00	5.00	1.25	0.75	3.75	2.50	5.00	3.75	2.50	3.75
Licensing and pricing	0%	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%	1.95	1.60	4.75	2.45	2.50	4.95	4.91	4.25	3.27	1.80	2.65
Company financials	50%	0.80	1.20	4.60	1.80	1.20	5.00	5.00	3.80	2.40	1.00	1.40
Training	5%	4.00	2.00	4.00	2.25	3.75	4.00	5.00	3.75	3.50	0.75	3.00
ECM customer base	45%	3.00	2.00	5.00	3.20	3.80	5.00	4.80	4.80	4.20	2.80	4.00
Geographic presence	0%	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, Q4 '11 Business



Source: Forrester Research, Inc.

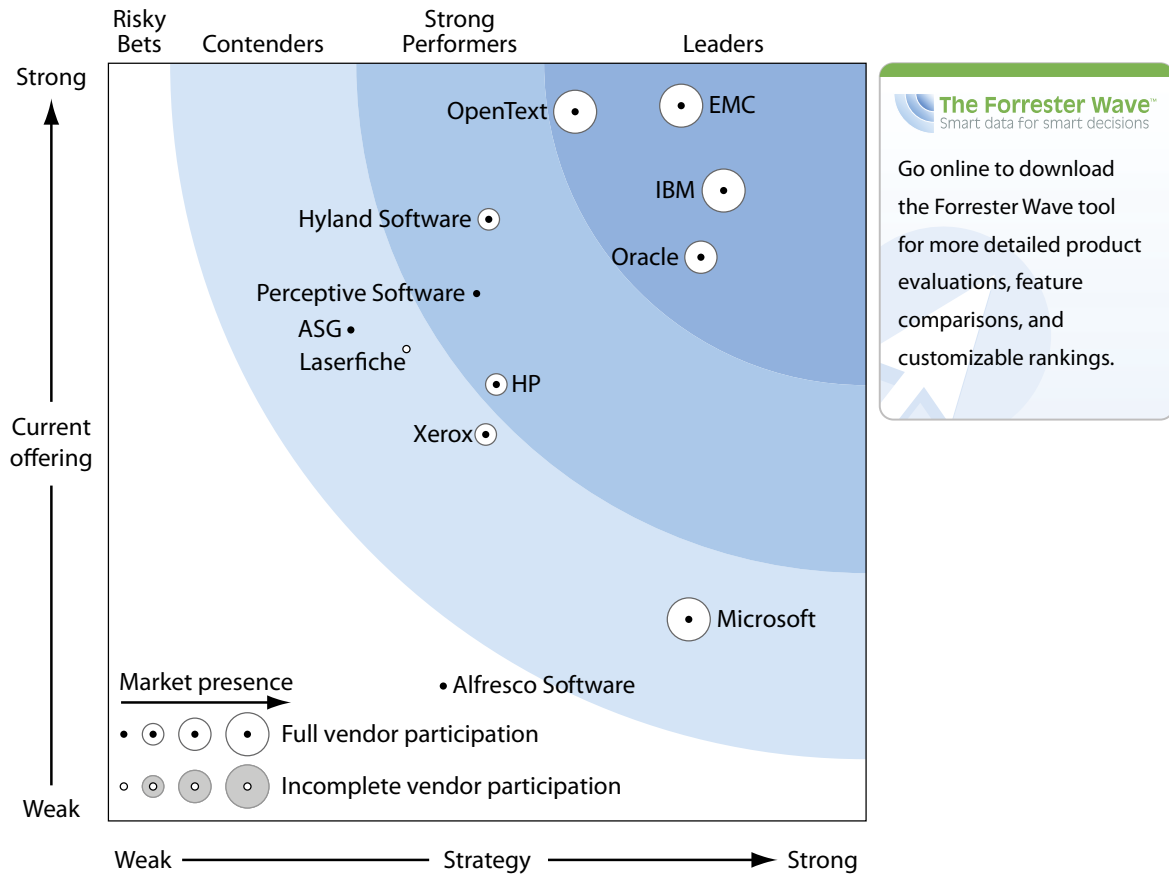
Figure 5 Forrester Wave™: Enterprise Content Management, Q4 '11 Business (Cont.)

	Forrester's Weighting	Alfresco Software	ASG	EMC	HP	Hyland Software	IBM	Microsoft	OpenText	Oracle	Perceptive Software	Xerox
CURRENT OFFERING	50%	2.54	1.57	4.28	2.34	2.77	4.17	3.65	4.39	3.98	2.39	2.66
Foundational content support	30%	3.23	2.02	4.34	3.11	3.64	4.42	4.06	4.62	4.64	2.17	3.66
Business content support	50%	2.20	0.80	4.20	2.00	2.20	4.20	3.80	4.20	3.60	2.40	2.00
Transactional content support	5%	1.00	5.00	5.00	1.00	5.00	5.00	1.00	5.00	3.00	5.00	3.00
Persuasive content support	5%	2.00	0.50	3.00	1.00	0.50	2.00	2.00	4.50	3.50	0.50	2.00
Core capability architecture	10%	3.20	2.90	4.80	3.10	3.00	3.90	3.80	4.30	4.60	2.60	3.10
STRATEGY	50%	2.80	1.74	4.76	3.04	3.23	4.88	4.51	4.04	4.70	3.10	3.02
Product strategy	60%	2.60	1.80	4.60	3.00	3.80	5.00	4.60	3.40	5.00	2.60	2.60
Whole solution strategy	30%	3.70	2.20	5.00	3.70	2.90	5.00	5.00	5.00	4.40	4.30	3.60
Product packaging strategy	10%	1.25	0.00	5.00	1.25	0.75	3.75	2.50	5.00	3.75	2.50	3.75
Licensing and pricing	0%	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%	1.95	1.60	4.75	2.45	2.50	4.95	4.91	4.25	3.27	1.80	2.65
Company financials	50%	0.80	1.20	4.60	1.80	1.20	5.00	5.00	3.80	2.40	1.00	1.40
Training	5%	4.00	2.00	4.00	2.25	3.75	4.00	5.00	3.75	3.50	0.75	3.00
ECM customer base	45%	3.00	2.00	5.00	3.20	3.80	5.00	4.80	4.80	4.20	2.80	4.00
Geographic presence	0%	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 6 Forrester Wave™: Enterprise Content Management, Q4 '11 Transactional



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Source: Forrester Research, Inc.

Figure 6 Forrester Wave™: Enterprise Content Management, Q4 '11 Transactional (Cont.)

	Forrester's Weighting	Alfresco Software	ASG	EMC	HP	Hyland Software	IBM	Microsoft	OpenText	Oracle	Perceptive Software	Xerox
CURRENT OFFERING	50%	0.89	3.24	4.72	2.88	3.97	4.16	1.33	4.68	3.72	3.48	2.55
Foundational content support	5%	2.20	2.41	4.27	3.80	2.72	4.19	3.07	4.43	3.56	2.56	2.47
Business content support	5%	2.00	1.10	3.80	2.40	2.70	4.20	3.80	4.00	4.10	2.80	2.50
Transactional content support	80%	0.40	3.40	4.80	2.80	4.20	4.20	0.80	4.80	3.60	3.60	2.40
Persuasive content support	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Core capability architecture	10%	3.60	3.40	4.80	3.30	3.40	3.80	3.50	4.20	4.60	3.30	3.80
STRATEGY	50%	2.21	1.60	3.78	2.56	2.51	4.06	3.83	3.08	3.91	2.43	2.49
Product strategy	70%	1.75	1.50	3.25	2.25	2.50	3.75	3.50	2.25	3.75	1.75	2.00
Whole solution strategy	25%	3.70	2.20	5.00	3.70	2.90	5.00	5.00	5.00	4.40	4.30	3.60
Product packaging strategy	5%	1.25	0.00	5.00	1.25	0.75	3.75	2.50	5.00	3.75	2.50	3.75
Licensing and pricing	0%	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%	1.95	1.60	4.75	2.45	2.50	4.95	4.91	4.25	3.27	1.80	2.65
Company financials	50%	0.80	1.20	4.60	1.80	1.20	5.00	5.00	3.80	2.40	1.00	1.40
Training	5%	4.00	2.00	4.00	2.25	3.75	4.00	5.00	3.75	3.50	0.75	3.00
ECM customer base	45%	3.00	2.00	5.00	3.20	3.80	5.00	4.80	4.80	4.20	2.80	4.00
Geographic presence	0%	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

- Alfresco Software.** Open source vendor Alfresco is positioned as a Strong Performer in the business segmentation and as a Contender in the overall and foundational segments. Alfresco is positioned as a Risky Bet in the transactional segment. Alfresco's rather consistent score in the overall, foundational, and business areas indicates that it has a well-rounded ECM offering focused on addressing the fundamentals of ECM. Alfresco targets organizations looking for an alternative ECM solution with a lower cost and smaller footprint. Its product strategy focuses on integrating ECM functionality with social software, making this a particularly relevant solution for organizations with heavy enterprise social investments (e.g., those organizations that want to manage content created in blogs, wikis, and discussion forums). The product's strength also lies in its foundational content support — particularly its core document management and content services. Alfresco is also a flexible solution, as it supports multiple delivery methods: on-premises, cloud, clustered, and distributed. However, Alfresco still lacks functionality in supporting transactional and persuasive content.

- **ASG.** ASG is positioned as a Contender in the overall, foundational, and transactional segments and as a Risky Bet in the business segment. ASG's acquisition of Mobius Management Systems in 2007 gives it a competitive ECM offering that focuses on managing transactional content. Its strength lies in imaging, integration, and platform support. However, ASG lacks robust support for business and persuasive content. ASG instead targets organizations with heavy transactional needs but little need to manage other types of content. In that vein, ASG focuses on delivering solutions for high-volume document management, storage, and archiving applications. ASG-DocumentDirect also has impressive multiplatform support.
- **EMC.** Reflecting its robust product offering, EMC placed as a Leader on each of the four segments: overall, foundational, business, and transactional. EMC is a legacy player that has long been at the forefront of the ECM market, with a broad range of capabilities and strengths, particularly in its document management support. EMC offers a suite of ECM technologies packaged to deliver solutions for case management, information governance, and traditional content management. EMC continues its innovative strategy by providing the industry's first VMware vFabric-enabled vCube cloud architecture for private, public, and hybrid cloud environments for highly architected enterprise solutions. EMC has recently begun to move away from supporting persuasive content, instead relying on partnerships with vendors like SDL. EMC now focuses on managing transactional, business, and foundational content.
- **HP.** HP Trim provides a well-integrated suite for document and records management, and HP ranked as a Strong Performer in the overall, foundational, business, and transactional areas. While HP Trim does support some transactional capabilities, HP partners with other ECM vendors to provide high-volume transactional capabilities. HP focuses on supporting an organization's records management needs, both electronic and physical. HP Trim solidifies its foundational capabilities with a strong, transparent SharePoint integration. HP's pending acquisition of Autonomy will potentially strengthen its position in the ECM market. Autonomy brings a strong set of search, document management, web content management, and records management capabilities.
- **Hyland Software.** Hyland's consistent ranking as a Strong Performer in each of the four segments is due to its well-rounded ECM functionality. Hyland continues to challenge the traditional ECM suite vendors. Hyland has found success focusing its ECM products in particular verticals (e.g., healthcare, public sector, financial services, insurance, etc.) that have integrated document imaging and archiving repository needs. Hyland also provides strong out-of-the-box integration capabilities (particularly with Microsoft's SharePoint). However, Hyland's lack of web content management and digital asset management solutions makes it a poor choice for those looking to support persuasive content.
- **IBM.** IBM is positioned as a Leader in all four areas. 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 supports collaboration features through integrations with its Lotus Quickr and Connections products as well as Microsoft SharePoint. IBM's weakness remains in its support of persuasive content, centered on a minimal WCM offering and the lack of rich media support. IBM relies on third-party products to meet the rich media requirements.

- **Laserfiche.** Laserfiche ranks as a Contender in all four segments, with its strengths focused on Transactional content. Laserfiche focuses on: the core transactional technologies, imaging, business process management, and multifunctional peripherals (MFPs). Laserfiche uses transactional content technologies to deliver packaged horizontal solutions, such as accounts payable and contract management to more than 10 industry segments (e.g., government, financial services, energy/utilities, healthcare, and higher education). Laserfiche's weaknesses lie in the business and persuasive content technology areas (e.g., web content management, rich media management, compound document management, and e-forms).
- **Microsoft.** Microsoft ranks in the Leader category for the business and foundational areas, while sitting on the cusp between Strong Performer and Leader for overall ECM functionality. Microsoft is positioned as a Contender in the transactional segment. SharePoint 2010 continues to grow in popularity, thanks to its blend of collaboration and content management support. SharePoint 2010's ECM capabilities are much improved from the 2007 release, and Microsoft has focused on empowering the worker by delivering a better enterprise-ready solution, (e.g., the metadata service provides enterprise taxonomy capability by working across site collections). The user interface between Microsoft applications is consistent and user-friendly. ECM functionality is delivered as an infrastructure component of the overall SharePoint functionality. SharePoint's weaknesses lie in the transactional segment, where it generally requires integration with a third-party ECM product for support.
- **OpenText.** OpenText ranks as a Leader across all of the segments. OpenText remains the largest pure-play platform ECM vendor, and its aggressive acquisition strategy has helped strengthen its ECM capabilities. OpenText is strong across a wide array of functionality: document management, records management, business process management, DAM, WCM, and imaging. OpenText addresses foundational content with the strongest integration support among all evaluated vendors for SharePoint. OpenText's challenges lie in its ability to rationalize the overlaps resulting from ECM acquisitions and integrate the new functionality into a cohesive offering.
- **Oracle.** Oracle ranks as Leader in all content technology segments due to its broad set of capabilities. Oracle has rebranded its ECM product as Oracle WebCenter. Oracle WebCenter, which includes Oracle's new portal platform, weaves ECM into the fabric of the portal application. By integrating ECM into the Oracle WebCenter portfolio, Oracle's ECM functionality provides the foundation for many content-centric business solutions, such as contract management or team collaboration. The Oracle WebCenter portfolio is made available to all of the core

Oracle products, thus providing ECM functionality to other Oracle products, such as Siebel or PeopleSoft. Oracle's ability to surface ECM functionality in Oracle WebCenter provides organizations with the ability to implement an enterprise portal with extensive ECM capabilities. Oracle's main weaknesses lie in its archiving and compound document publishing capabilities.

- **Perceptive.** Perceptive ranks as a Strong Performer in the overall, business, and transactional segment, with its strongest score in the transactional segment. Perceptive is positioned as a Contender in the foundational segment. Perceptive focuses on supporting transactional applications and delivering 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 needs to strengthen its capabilities in addressing persuasive content for it to be seen as a more well-rounded ECM vendor.
- **Xerox.** Xerox ranks as a Strong Performer in the overall, foundational, and business areas. Xerox is positioned as a Contender in the transactional segment. Xerox provides a highly scalable solution that focuses on supporting business and foundational content. With the acquisition of ACS, Xerox can now deliver both on-premises and SaaS-based solutions. Xerox leverages ACS product Online Document Management (ODM) to deliver high-volume transactional ECM functionality. One of Xerox's strengths is its scalability and integration with office devices such as printers, scanners, and MFPs to provide simple, low-volume imaging capability. Xerox leverages this strength to engage the hardware sales force in the selling of ECM solutions. Xerox's weakness in supporting web content management, archiving, and SharePoint integration keeps it as being seen as a role player instead of a general vendor that can address an enterprise needs for ECM solutions.

SUPPLEMENTAL MATERIAL

Online Resource

The online version of Figures 3 through 6 is an Excel-based vendor comparison tool that provides 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. Each vendor was given a scenario script to follow.
- **Customer reference calls.** To validate product and vendor qualifications, Forrester also conducted reference calls with at least three 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.

ENDNOTES

- ¹ Organizations are struggling to control their digital content, Redundant and unnecessary information sloshes around in content management systems and circulates through email. Unmanaged content can reduce information worker productivity and expose organizations to enormous legal risks. To launch (or simply build a case for) an information governance initiative, C&C professionals need a map of what content is out there. See the October 20, 2010, "[Take Control Of Your Content](#)" report.
- ² Enterprises increasingly need to support multiple content types in different ways. They don't necessarily need a single ECM vendor that supports all content types. Instead, when developing a content strategy, they should consider persuasive, transactional, and foundational content functionality to support specific business use cases. See the April 14, 2011, "[Plan Your ECM Strategy For Business, Persuasive, Transactional, And Foundational Needs](#)" report.
- ³ Forrester evaluated 10 WCM products across approximately 115 criteria. SDL and Adobe lead due to their rich functionality, strategy, and enterprise track record. See the July 13, 2011, "[The Forrester Wave™: Web Content Management For Online Customer Experience, Q3 2011](#)" report.

The DAM landscape remains fragmented and complicated. There are few major players in this space, and no vendor or group of vendor dominates the landscape. There are so many players in part due to widely varying definitions of the term DAM. In order to make sense of this complicated space, C&C pros should examine their own needs against the set of capabilities offered within four flavors of DAM: high-end production, mid-level marketing operations, corporate audio and video, and line-of-business general purpose. See the April 28, 2011, "[The Rich Media Management Mystery](#)" report.

- ⁴ Forrester evaluated 10 WCM products across approximately 115 criteria. SDL and Adobe lead due to their rich functionality, strategy, and enterprise track record. See the July 13, 2011, "[The Forrester Wave™: Web Content Management For Online Customer Experience, Q3 2011](#)" report.

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