



THE RADICATI GROUP, INC.  
A TECHNOLOGY MARKET RESEARCH FIRM  
PALO ALTO, CA 94301  
TEL. 650 322-8059 • FAX 650 322-8061

## ***Enterprise Content Management Market, 2014-2018***

### **SCOPE**

This study covers the Enterprise Content Management (ECM) market in 2014 and its expected evolution over the next four years. The report examines market trends, corporate demand, competitive landscape and leading vendor products and strategies.

The report provides data on worldwide market size and revenue market share by vendor, as well as worldwide market growth forecasts in terms of revenue from 2014 to 2018.

All market numbers, such as market size, forecasts, revenue information, and any financial information presented in this study represent worldwide figures, geographical breakouts are also provided where appropriate. All revenue numbers are expressed in \$USD.

The revenue numbers listed for each vendor and service provider do not represent total company revenue. They only represent sales of solutions for the 2014 calendar year as well as recurring license and maintenance fees. Professional services revenue is not included.

EUROPE: LONDON NW3 5JY • TEL. +44 (0)20 7794 4298 • FAX. +44 (0)20 7431 9375

Email: [sara@radicati.com](mailto:sara@radicati.com)

<http://www.radicati.com>

## METHODOLOGY

The information and analysis in this report are based on primary research conducted by The Radicati Group, Inc. Our proprietary methodology combines information derived from three principal sources:

- a. Our Worldwide Database which tracks user population, seat count, enterprise adoption and IT use from 1993 onwards.
- b. Surveys conducted on an on-going basis in all market areas which we cover.
- c. Market share, revenue, sales and customer demand information derived from vendor briefings.

Forecasts are based on historical information as well as our in-depth knowledge of market conditions and how we believe markets will evolve over time.

Finally, secondary research sources have also been used, where appropriate, to cross-check all the information we collect. These include company annual reports and other financial disclosures, industry trade association material, published government statistics and other published sources.

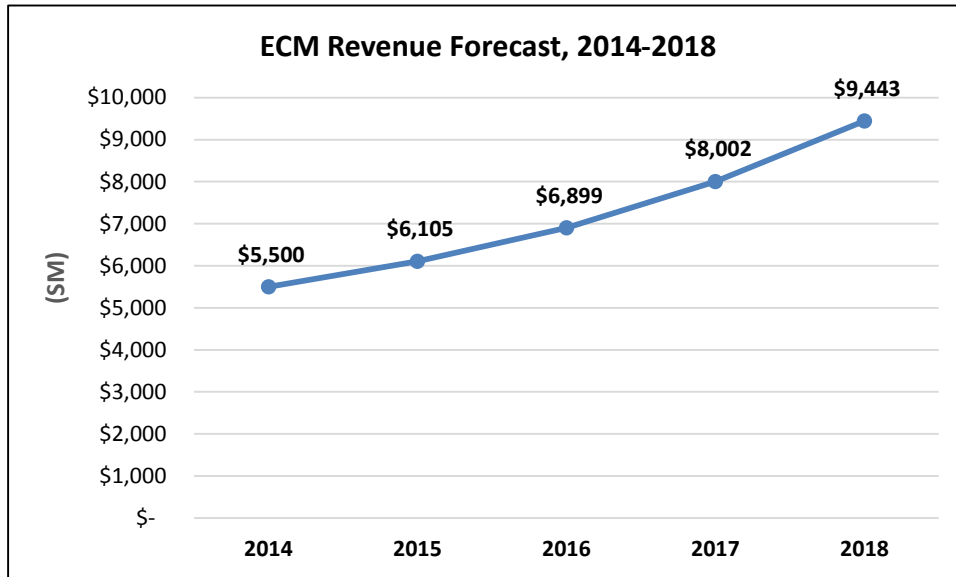
Our research processes and methodologies are proprietary and confidential.

## EXECUTIVE SUMMARY

- Enterprise Content Management (ECM) solutions enable the management of business information throughout the content lifecycle, from creation to disposition. They provide the technology necessary to capture, manage, access, store, search, and deliver content related to business processes and workflows. Content refers to wide range of structured or unstructured information, including: documents, records, web content, digital assets, and much more.
- The ECM market continues to be highly lucrative not just from direct sale and maintenance of ECM suites, but also for the extensive amount of add-on components each sale brings along in terms of additional software, hardware, storage and professional services. ECM solutions form the essential information flow backbone of most enterprises

and vendors that successfully place their solutions with a customer invariably find tremendous add-on sale opportunities.

- The proliferation of mobile devices in the enterprise along with emergence of the remote workforce has challenged ECM vendors to be able to provide a consistent user experience irrespective of the device being used. Most ECM vendors offer mobile apps that deliver basic functionality, including: searching and accessing documents, initiation of workflows, and content collaboration.
- The growing use of corporate social platforms has also had an impact on ECM functionality. All ECM vendors have recognized the need to integrate more social functionality, such as activity news streams and social feedback systems, into their ECM platforms, as well as better integration with popular social networks.
- Most vendors in the ECM market have continued to build out their cloud-based offerings. Demand for these SaaS services is steadily growing among customers and we expect this trend to continue in the near future. All ECM vendors are expanding on their cloud strategy, either by offering private cloud options, managed services or a combination of on-premises and cloud services. While multi-tenant offerings are still rare (with the exception of Microsoft SharePoint Online), nearly all vendors are considering some sort of multi-tenant offering for the future.
- File and Sync services from providers such as Box.net, Dropbox, and others are continuing to expand their presence within the enterprise. This has driven nearly all ECM vendors to offer similar solutions of their own, typically bundled at no cost with their larger suites.
- While there is strong growth in the ECM market, there is also a great deal of replacement activity. As the market has matured, many customers with older deployments are re-examining their strategies in light of cloud and mobile workforce mandates and are looking around for new ECM platforms on which to build their information management strategies. This creates opportunities for many newer vendors.
- Figure 1, shows the ECM revenue forecast from 2014 to 2018. The ECM market will grow from \$5.5 billion in 2014 to over \$9.4 billion in 2018, this is an average annual growth of 15% over the next four years.



**Figure 1: ECM Solutions Revenue Forecast, 2014-2018**

**To view the complete Table of Contents for this report,  
visit our website at [www.radicati.com](http://www.radicati.com).**