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Enterprise Content Management Market, 2012-2016

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SCOPE

This study covers the Enterprise Content Management (ECM) market in 2012 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 2012 to 2016.

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 2012 calendar year as well as recurring license and maintenance fees. Professional services revenue is not included.

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METHODOLOGY

The information and analysis in this report is based on primary research conducted by The Radicati Group, Inc. in 2012. It consists of information collected from vendors, and corporate users via on-going interviews and surveys.

Secondary research sources have also been used, where appropriate, to cross-check the information collected. These include company annual reports and market size information from various related market segments of the computer industry.

EXECUTIVE SUMMARY

- Enterprise Content Management, or ECM, solutions enable the management of business information throughout the content lifecycle, from creation to disposition. ECM solutions provide the technology necessary to capture, manage, access, store, search, and deliver content related to business processes and workflows. Information can be collected from a variety of corporate repositories including: email, text documents, images, videos, audio files, websites, paper documents, and more.
- The variety of ways that business users are communicating with one another has led to a sharp rise in data and content that must be managed. Users are communicating through social media, IM, email, SMS text message, video chat, and collaboration software. With each user now communicating through so many different channels, it has become imperative that businesses remain on top of all of this new content and manage it as they would traditional corporate information.
- There has also been a dramatic rise in the amount of unstructured data that is being produced within businesses of all sizes. The proliferation of social information and mobile content within the enterprise has been a huge contributor to the growing amount of corporate data. More businesses are also seeing an increase in the use of digital media which includes content such as training videos, audio files, promotional images, web-conference presentations, and more.

- A growing trend among businesses today is the deployment and integration of ECM solutions from multiple vendors. The best-of-breed approach has become more prevalent among businesses as they look to best satisfy their specific ECM needs, regardless of how many vendors it requires. A catalyst driving these inter-vendor deployments has been an increased level of cooperation and integration among vendors in the ECM market. More vendors have realized that often customers do not want to be permitted to only use one product from a single vendor; instead they want to pick and choose the necessary solutions based on their unique requirements.
- On-premises ECM deployments continue to dominate the market in comparison to cloud-based ECM services. ECM has adopted cloud-based services at a slower rate when compared to other enterprise technologies. Customers most often cite concerns about reliability, security, and migration as preventing them from deploying a cloud-based ECM service.
- Nearly all ECM vendors are now supporting and providing integration with Microsoft SharePoint. Microsoft SharePoint can provide some of the basic features of an ECM solution, however, it is much more effective when used as an underlying platform and third-party solutions are integrated with it to provide more advanced ECM functionality. In most situations, businesses will utilize Microsoft SharePoint's ECM capabilities, evaluate their specific needs, and then go out and find an ECM vendor(s) that are able to satisfy more complex requirements.
- Figure 1, shows the ECM revenue forecast from 2012 to 2016. The ECM market will grow from \$4.4 billion in 2012 to over \$7.5 billion in 2016, this is an average annual growth of 15% over the next four years.

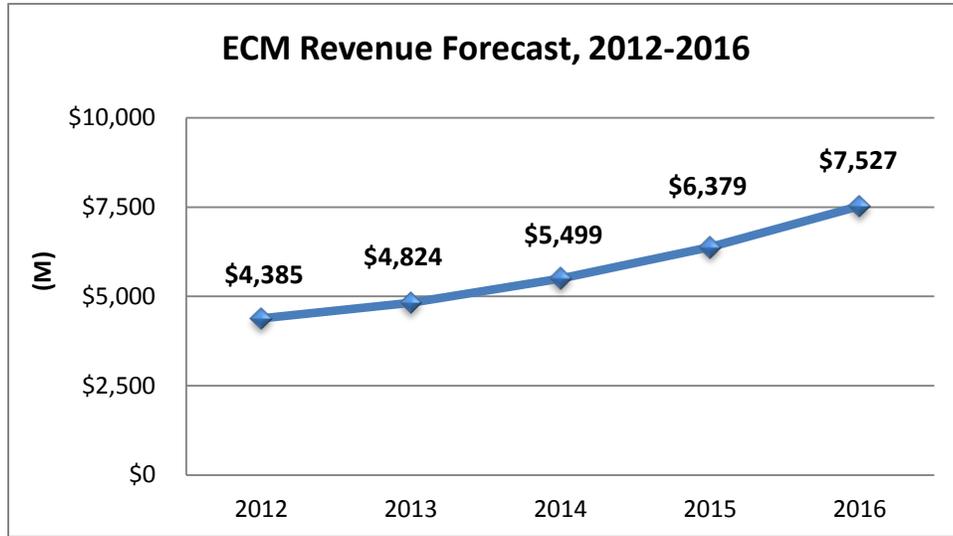


Figure 1: ECM Solutions Revenue Forecast, 2012-2016

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