Enterprise Content Management Market, 2013-2017

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SCOPE

This study covers the Enterprise Content Management (ECM) market in 2013 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 2013 to 2017.

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 2013 calendar year as well as recurring license and maintenance fees. Professional services revenue is not included.

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, 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. The term "content" is broad and can refer to wide range of unstructured information, including: documents, records, web content, digital assets, and more.

- ECM also pertains to the strategies applied to the management of unstructured information everywhere that information exists within a business. An effective ECM strategy has a widespread impact throughout an organization as ECM is related to and overlaps with a variety of different business objectives, including compliance, collaboration, and security.

The ECM efforts of many businesses are an ongoing evolution of information as it moves through its lifecycle.

- Enterprise content management (ECM) remains a primary focus of many businesses as the amount of digital content being created by businesses continues to grow at an exponential rate. ECM solutions continue to be a top priority for businesses due to their ability to effectively and efficiently capture, store, manage, and deliver enterprise content.

- Over the last few years several disruptive technologies have emerged, forcing vendors to evolve their product lines and business strategies. Customers are demanding rapid innovation along with cutting edge functionality when considering deploying an ECM solution. The most prominent technologies in the ECM market to emerge recently include: cloud-based services, social media, and mobility.

- 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 have mostly concentrated on developing mobile apps for Apple iOS and Google Android devices.

- The sharp rise in popularity of corporate social platforms has had a direct impact on many ECM vendors. These vendors have recognized an opportunity to integrate more social functionality, such as activity news streams and social feedback systems, into their ECM platforms. The integration of more social elements into ECM platforms is promising and we could see more businesses adopting these types of solutions rather than deploying a standalone social media service.

- Figure 1, shows the ECM revenue forecast from 2013 to 2017. The ECM market will grow from $5.1 billion in 2013 to over $9.3 billion in 2017, this is an average annual growth of 16% over the next four years.
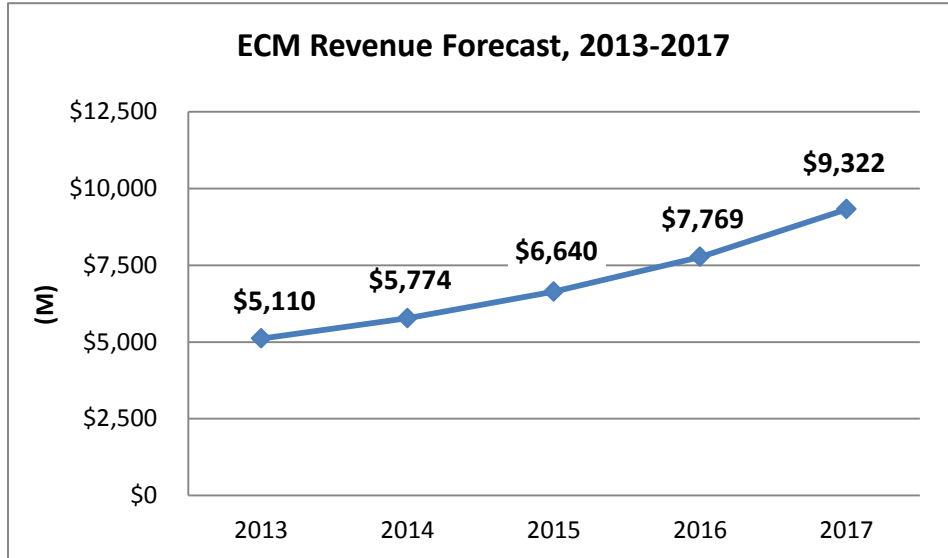
ECM Revenue Forecast, 2013-2017

Figure 1: ECM Solutions Revenue Forecast, 2013-2017

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