

October 7, 2005

The Forrester Wave™: Enterprise Content Management Suites, Q3 2005

by Kyle McNabb

TECH CHOICES

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Evaluation Of Top ECM Suite Vendors Across 53 Criteria

by **Kyle McNabb**

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EXECUTIVE SUMMARY

As demand for enterprise content management (ECM) grows, IT infrastructure decision-makers are turning to ECM suites to provide a platform for managing all unstructured information. But how broad and deep are the ECM suites? Do vendors truly provide a suite or just a collection of individual products? And how well do vendors address broader IT infrastructure needs? Forrester evaluated leading ECM vendors and found that IBM and EMC established early ECM platform leadership — thanks to their ECM capabilities and infrastructure focus — and Stellent leads ECM pure plays with the most complete, suite-ready ECM offering. FileNet, Hummingbird, Interwoven, and Vignette are strong performers, but lack an IT infrastructure focus, and are better suited for content-centric apps. Microsoft has more ECM vision than current capabilities, while Oracle has an ECM suite that while limited in scope shows substantial promise. Open Text still has work ahead to build a true suite and has a questionable ECM strategy. And despite acquisitions, Mobius Management Systems has not gotten traction in ECM and is best suited for complex COLD requirements.

TABLE OF CONTENTS

- 2 The ECM Paradox: Mature Technologies In A Still Emerging And Evolving Market**
- 4 What IT Decision-Makers Want From ECM Suites**
- 5 The ECM Wave Criteria: Suite Readiness, Extended Capabilities, And Strategy**
 - Evaluation Methodology Includes Vendor Surveys And Customer Interviews
 - Vendors Selected For ECM Breadth And Infrastructure Focus
- 7 The Forrester Wave Results — EMC And IBM Lead, Followed By Stellent**
- 10 Vendor Profiles For Leaders, Strong Performers, And Contenders**
- 14 Supplemental Material**

NOTES & RESOURCES

Forrester conducted evaluations in June and July 2005 of ECM suites from EMC, FileNet, Hummingbird, IBM, Interwoven, Microsoft, Mobius Management Systems, Open Text, Oracle, Stellent, and Vignette. We also interviewed more than 20 user organizations that have deployed ECM products from these vendors.

Related Research Documents

“ECM Growth Outpaces The Overall Software Market”

July 18, 2005, Market Overview

“The Forrester Wave™: Web Content Management, Q1 2005”

April 15, 2005, Tech Choices

“The Enterprise Content Management Dilemma: Point Solution Or Suite?”

January 18, 2005, Tech Choices

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THE ECM PARADOX: MATURE TECHNOLOGIES IN A STILL EMERGING AND EVOLVING MARKET

The ECM market comprises many established and even mature technologies, including document management (DM), document imaging, Web content management (WCM), digital asset management (DAM), computer output to laser disc (COLD) — sometimes called enterprise report management (ERM) — and records management (RM) (see Figure 1).¹ Yet while these individual technologies are mature, the ECM market only recently emerged and is still evolving into suites, content-centric applications, and core infrastructure for information management.² Explosive growth in content and collaborative processes, the desire for central visibility and control, and the awareness that content needs to be managed with the same strictness as data is prompting many organizations to take a more holistic view of their ECM needs.³

The content and IT vendors evaluated in this report have responded — and are still responding — to the market's need for ECM suites from a single vendor by developing, assembling, or buying point solutions. As a result, the ECM vendors' suite readiness varies widely, because some ECM vendors — like FileNet— developed their products in-house, while other vendors — like Open Text — went on buying sprees. Also, some ECM suites support a broader range of content types (and content usages) than others, depending on the vendor's positioning and business strategy. Because the ECM market is still evolving, no single ECM vendor can address the full spectrum of transactional, business, and persuasive content that ranges from supporting back-office processes to selling products and services via the Internet.⁴

Three key trends impacting the ECM vendors' positioning are:

1. **ECM suites are still under construction.** Vendors are at different stages because some started on their ECM strategies a long time ago (e.g., EMC, IBM) and some only recently shifted from point solutions to ECM suites (e.g., Open Text, Vignette). Also, some acquired products and others developed them internally. This variability has created three situations, all of which are evaluated in this Wave: 1) what is each vendor's reach across the full spectrum of content (imaging, DM, WCM, RM, DAM, COLD); 2) how well integrated are the components; and 3) how rationalized are the components into a truly suite-ready product?
2. **Infrastructure vendors are on the move.** IBM has been in ECM a long time and EMC helped create the ECM market through its early acquisitions, while Microsoft and Oracle are quite late to the market. But watch this space because companies want to buy from the big vendors that are not only more viable, but can position ECM in their overall IT infrastructure portfolios — be they information management, information workplaces, or packaged business applications.
3. **ECM pure plays are faced with a dilemma.** As the ECM market consolidates and converges, do they go with an infrastructure or content-centric applications strategy (see Figure 2)?⁵

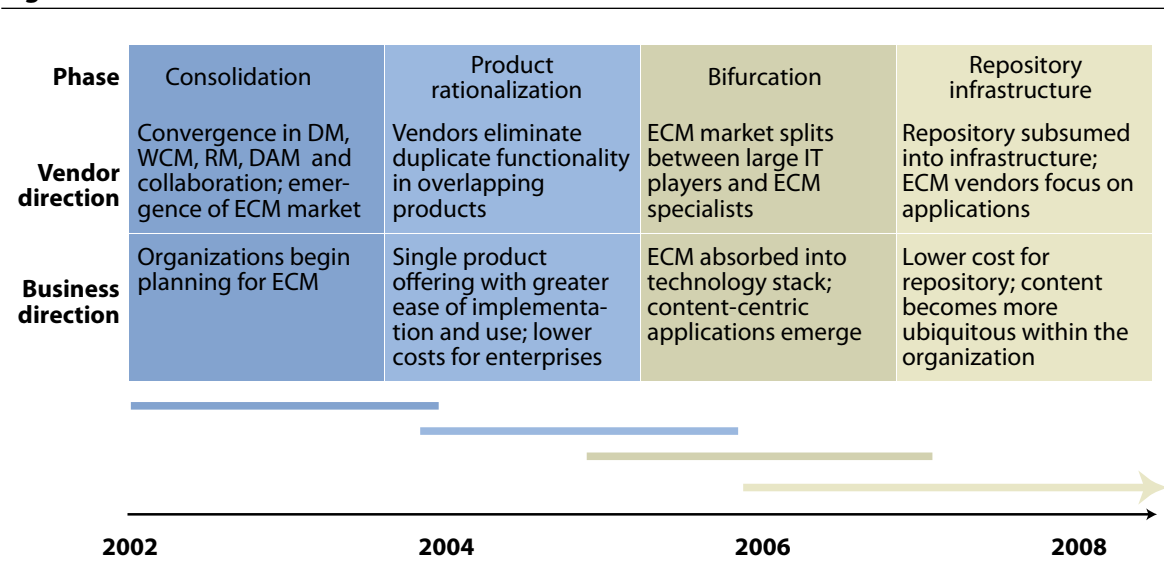
Realistically, the pure plays must move aggressively into content-centric applications to minimize market share erosion to IT infrastructure players that are now ECM suite vendors. Some of the pure plays (like Interwoven and Vignette) get it — but many of them don't.

Figure 1 Primary ECM Technologies

Technology	Definition
Document management	Software that manages the complete life cycle of office documents from collaborative authoring to archival; key features include indexing, check-in/checkout, versioning, annotations, workflow, and life-cycle management.
Document imaging	Software for scanning, indexing, retrieving, and archiving digital images of text, graphics, engineering drawings, and photographs. Typically systems provide workflow functionality and limited DM functionality.
Web content management	Software that enables the collection, assembly, staging, maintenance and delivery of textual and graphic content for the primary purpose of disseminating information via the Web. The standard definition of WCM includes both a staging and delivery component.
Digital asset management	Software for managing the life cycle of large collections of digital assets, such as photographic images, graphics, brand logos and compound documents.
COLD	Systems that focus on high-volume computer-generated reports. Most provide report mining and electronic bill presentment capabilities (some integrate with bill payment systems) and most provide indexing of reports.
Records management	Software for managing long-term document archives through each document's full life cycle, including the systematic expunging of documents at the end of specified dates.

Source: Forrester Research, Inc.

Figure 2 ECM Market Bifurcation



Source: Forrester Research, Inc.

WHAT IT DECISION-MAKERS WANT FROM ECM SUITES

As one senior IT architect at a North American financial services organization succinctly noted, “What we want is to make an ECM platform decision the same way we make RDBMS decisions.” For many senior IT decision-makers, drawing a parallel between ECM and their RDBMS evaluations makes sense. They recognize a need for a set of core ECM capabilities that can be rapidly deployed to support specific application requirements, either commercial or custom. They also want a future in which their selection of an ECM platform is divorced from their selection of content-centric applications. Yet they also realize some specific business requirements demand application functionality in the ECM platform, such as basic document management support for collaborative processes.⁶ More specifically, IT infrastructure decision-makers want:

- **Support for true enterprisewide deployments.** A vice president of IT infrastructure at a multi-national life science organization recently observed “ECM touches just about every individual in this company. Everyone creates or interacts with content, just like everyone interacts with email. Whichever ECM [platform] we choose has to take this into consideration.” Unlike business applications such as ERP and CRM applications that are used by only a segment of the employee population, ECM technologies have the potential to be utilized by an organization’s entire employee population. As a result, ECM platforms must support a wide range of usage scenarios, and be available and accessible to end users at any time.
- **ECM capability breadth, with a focus on document management and records retention.** To meet pressing compliance, governance, and risk management needs, IT decision-makers need their ECM platforms to provide document (including imaging support for moderate transaction volumes) and records management. Other areas such as high-volume production document imaging and WCM, in particular, are important to certain verticals, such as financial services — where document transaction volumes can reach hundreds of thousands to millions on a daily basis, and retail — where highly persuasive interaction needs to be supported. In addition, high-end document management is still a requirement for organizations supporting multi-author, compound document publishing processes such as Food and Drug Administration (FDA) approvals in life sciences.
- **A content platform with a common set of services.** To avoid the cost of replacing or swapping out one set of capabilities for another, and to reduce the overall cost and complexity of the ECM suite, IT decision-makers want ECM suites that are rationalized so they don’t require multiple repositories and overlapping functionality. While service-oriented architecture (SOA) is one way to build suite readiness, that alone is not sufficient. Specifically, the ECM suite must be built around a common set of repository services that include check-in/check-out, revision control, security and access control, and retention management for all content types. In addition, IT desires common administration, workflow, search, and metadata management to ease system administration and application development complexity.

- **ECM as an extension of an IT infrastructure portfolio.** Reducing the number of vendors an IT organization manages is a big priority that influences ECM platform evaluations. As a result, many IT decision-makers want to source their ECM suite from a major IT infrastructure provider they already use extensively. In particular, these decision-makers want the ECM suite to be surrounded by a broader set of capabilities including collaboration tools, e-forms, enterprise search, and middleware capabilities like business process management (BPM) and enterprise content integration.⁷
- **Vendors with an infrastructure-oriented strategy.** Many decision-makers want their ECM suite to follow a similar technology path as their RDBMS. They want to know if the platform has a technology strategy focused on high-availability, security, and IT administration and developer support. To become the corporate standard for unstructured information management, IT wants the ECM platform to meet their IT infrastructure standards such as SOA, integrated development environments (IDEs), directories, and storage infrastructure.
- **Vendors that have extensive systems integration services and partnerships.** Today's resource constrained IT organizations will be stretched further to support enterprisewide deployments of common ECM capabilities. And when business users' more specific requirements arise — like customer correspondence management or the deployment of next-generation customer extranets — IT organizations quickly find they need help from systems integrators and certified implementation partners.

THE ECM WAVE CRITERIA: SUITE READINESS, EXTENDED CAPABILITIES, AND STRATEGY

To assess the state of the ECM market and evaluate vendors against ECM platform requirements, Forrester evaluated the strengths and weaknesses of leading ECM suite vendors using our Wave methodology. To do this, we developed a broad set of evaluation criteria after examining past research, functional and technical requirements, vendor and expert interviews, and future trends in the ECM market. Vendors were evaluated against approximately 55 criteria that can be grouped into three high-level categories and 11 subcategories (see Figure 3).⁸

Figure 3 Evaluation Criteria

CURRENT OFFERING	
Breadth of capabilities	How broad is the vendor's current ECM set of capabilities?
Suite readiness	Is the vendor's offering a suite or independent products?
Extended capabilities	What extended ECM related infrastructure capabilities does the vendor provide?
Architecture	What is the vendor's ECM architecture in support of enterprise IT environments?
Miscellaneous	What is the suite's training, documentation, and internationalization support?
Licensing and pricing	How is the current offering licensed and what expectations should organizations have regarding professional services?
STRATEGY	
Product strategy	How strong is the vendor's strategy and vision for ECM as infrastructure?
Whole solution strategy	How has the vendor complemented its ECM suite with value-added relationships?
MARKET PRESENCE	
Company financials	How strong is the vendor's financial position?
Customer base	How large is the vendor's installed base of customers for this product and related, earlier products?
Geographic presence	Is the vendor able to address the needs of global organizations and tap into ECM growth throughout multiple geographic regions?

Source: Forrester Research, Inc.

Evaluation Methodology Includes Vendor Surveys And Customer Interviews

Forrester used a combination of three data sources to evaluate the strengths and weaknesses of each vendor:

- **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 briefings and demos.** We asked vendors to brief us on each of the evaluated products and demonstrate their product's functionality. We used findings from these sessions 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. We gathered additional information through inquiry calls with clients that use these products.

Vendors Selected For ECM Breadth And Infrastructure Focus

The ECM vendors evaluated in this wave, are EMC, FileNet, Hummingbird, IBM, Interwoven, Microsoft, Mobius Management Systems, Open Text, Oracle, Stellent, and Vignette. These vendors are all market leaders, and were chosen because of one of the following:

- **Core functionality breadth.** The suite offers, at minimum, Web content management, document management, and records management.
- **Leadership in IT infrastructure.** The vendor is a market-leading RDBMS vendor with at least two of the following three components of ECM: Web content management, document management, records management, and has a road map — that has been shared with Forrester — covering all three components.

THE FORRESTER WAVE RESULTS — EMC AND IBM LEAD, FOLLOWED BY STELLENT

The ECM market is still evolving, yet IT infrastructure vendors are establishing early leadership positions. Our evaluation shows (see Figure 4):

- **IBM and EMC are clear ECM suite leaders.** IBM and EMC have both been in the ECM market for the longest time and have ECM strategies that align with IT's needs. DB2 Content Manager, the core of IBM's ECM portfolio, offers strong document imaging, COLD, and records management support. Plus, IBM's extended capabilities incorporate team collaboration, enterprise search, business process management, and content integration. IBM's information management strategy — which combines ECM, data management, and integration technologies — and its broad ECM portfolio helped the vendor overcome average scores for its current offering and below average suite readiness scores. EMC's Documentum 5.3 offers ECM breadth and strong document management. EMC also scored above average in extended capabilities, thanks to its investment in enterprise search, content integration, and team collaboration through eRoom.⁹ EMC complements its ECM capability breadth with an infrastructure-oriented information life-cycle management strategy.
- **Stellent has the strongest pure-play ECM suite offering.** Stellent's Universal Content Management offers the most complete current ECM suite offering of the vendors evaluated by supporting all three types of content: transactional, business, and persuasive. High scores in breadth of capabilities, suite readiness, and architecture offset the vendor's limited set of extended capabilities like collaboration.

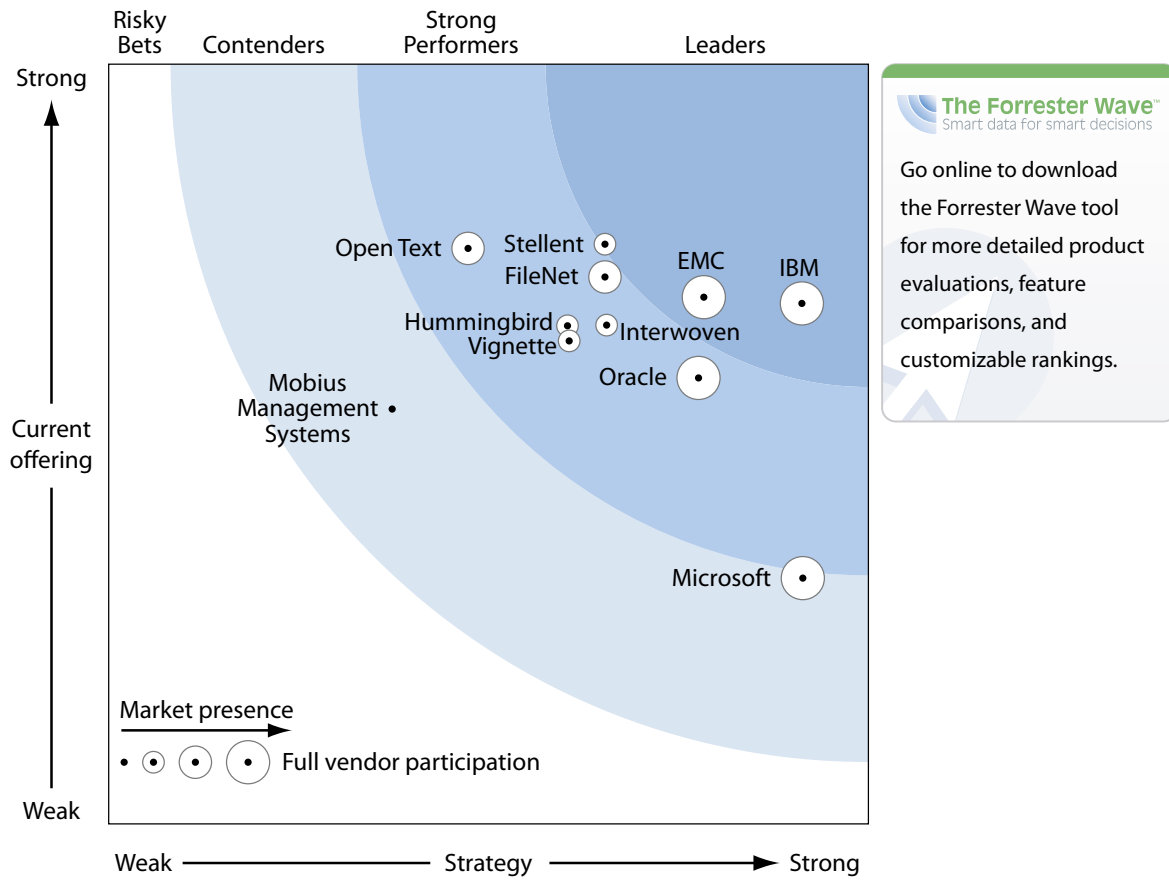
- **FileNet, Interwoven, Hummingbird, and Vignette really “get” content-centric apps.** All of these vendors have broad ECM capabilities; however, limitations in extended capabilities or suite readiness adversely impacted their overall score. But their strategies are sound: They’re doing a good (and sometimes great) job positioning for the competitive onslaught from IT infrastructure vendors by focusing on content-centric apps as differentiators.

For example, Interwoven has combined its comprehensive document and Web content management capabilities with content-centric apps like eDiscovery (through its partnership with Fios), and its recent acquisition of over-the-counter (OTC) derivatives automation vendor Scrittura.¹⁰ Similarly, FileNet is aggressively investing in business process management (BPM) and active content to support content-centric business processes. Vignette — with its solutions for compliance, case management, and employee training and certification — is also eyeing the content-centric apps market. And Hummingbird has a long history of developing and marketing vertically and horizontally oriented content-centric solutions like contract management and deal management.

- **Oracle has limited ECM capability breadth, but a strong foundation.** Oracle made its entry into ECM with a very large splash. The vendor’s Content Services 10g has ECM breadth where it matters most to IT infrastructure decision-makers — DM and RM.¹¹ In addition, the product scores well in suite readiness and offers a strong foundation with common administration, workflow, search, and a single content repository. Oracle received high scores for its extended capabilities thanks to Fusion Middleware capabilities that encompass team collaboration, business process management, and enterprise search. But Oracle lacks a broad pool of certified resources to assist in ECM implementations, especially compared to its primary competitors — EMC and IBM.
- **Open Text and Mobius are really selling point solutions surrounded by an ECM suite.** Both vendors have strong point solutions — with Open Text offering strong digital asset management and archiving products, and Mobius Management Systems providing comprehensive COLD support. However, Open Text is hamstrung by its questionable and unsustainable strategy of constant acquisitions. Although Open Text is committed to the ECM suite, it has not surrounded its product portfolio with a sizeable resource pool of systems integrators and certified implementation partners to assist in enterprisewide deployments. Mobius Management Systems has considerable strengths and significant market share in COLD, but has little recognition for other areas, including document imaging and records management, and has very few extended capabilities. Mobius needs to get more aggressive on the marketing front to distinguish itself as more than a COLD leader.
- **Microsoft has a powerful vision, but is late to the game with very limited products.** Microsoft currently offers an extremely limited set of basic DM and WCM functionality through Windows SharePoint Services and Microsoft Content Management Server, respectively. These limited

capabilities, and correspondingly low suite readiness scores, are offset by the vendor's vision for its next release of the Microsoft Office suite, Office 12.¹² Microsoft's clout in the desktop environment, and burgeoning collaboration and information workplace technologies, gives the vendor a unique, strategic position to deliver an ECM platform in the not so distant future.

Figure 4 Forrester Wave™: Enterprise Content Management Suites, Q3 '05



Source: Forrester Research, Inc.

Figure 4 Forrester Wave™: Enterprise Content Management Suites, Q3 '05 (Cont.)

	Forrester's weighting	EMC	FileNet	Hummingbird	IBM	Interwoven	Microsoft	Mobius Management Systems	Open Text	Oracle	Stellent	Vignette
CURRENT OFFERING	50%	3.47	3.60	3.29	3.43	3.28	1.62	2.73	3.79	2.93	3.82	3.18
Breadth of capabilities	45%	3.40	3.10	3.60	3.50	4.00	0.85	2.80	3.80	1.55	3.90	3.50
Suite readiness	20%	2.90	4.30	2.00	2.20	2.40	1.40	3.10	3.10	4.90	4.90	2.00
Extended capabilities	15%	2.40	2.30	2.80	4.55	1.05	2.30	1.05	3.70	3.90	0.80	1.80
Architecture	15%	5.00	5.00	4.00	3.20	4.20	2.40	3.60	4.60	3.20	5.00	5.00
Miscellaneous	5%	5.00	5.00	5.00	5.00	4.34	5.00	3.00	4.32	3.66	4.32	3.66
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
STRATEGY	50%	3.90	3.25	3.00	4.55	3.25	4.55	1.85	2.34	3.86	3.25	3.02
Product strategy	65%	4.00	3.00	3.00	4.30	3.00	4.30	2.30	2.30	4.30	3.00	3.00
Whole solution strategy	35%	3.70	3.70	3.00	5.00	3.70	5.00	1.00	2.40	3.05	3.70	3.05
MARKET PRESENCE	0%	4.30	3.30	2.60	5.00	2.45	5.00	1.30	3.30	5.00	2.60	2.45
Company financials	70%	4.00	3.00	2.00	5.00	2.00	5.00	1.00	3.00	5.00	2.00	2.00
Customer base	30%	5.00	4.00	4.00	5.00	3.50	5.00	2.00	4.00	5.00	4.00	3.50
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 FOR LEADERS, STRONG PERFORMERS, AND CONTENDERS

Leaders: EMC And IBM

- **EMC.** EMC's Documentum 5.3 complements a deep strength in high-end document management with well-rounded, general-purpose document imaging, Web content management, digital asset management, and records management capabilities. However EMC currently lacks common administration and repository services across all aspects of ECM to fully address suite requirements. The vendor is committed to continue advancing its capabilities as a broad ECM platform, and leveraging EMC's broader information life-cycle management technology portfolio, branding, and market reach. EMC is a good fit for IT organizations desiring to make ECM an extension of their existing IT information management infrastructure.¹³
- **IBM.** IBM's Content Management offering is a broad ECM suite of capabilities with deep strengths in high-volume document imaging, COLD, and records management. While most of IBM's Content Management portfolio is based on DB2 Content Manager, products such

as DB2 Document Manager and Workplace Web Content Management require independent administration, workflow, or repository services that impact IBM's suite readiness. However, IBM provides a broad set of extended capabilities that run from storage management to systems management to application infrastructure and now includes comprehensive e-forms support (through the acquisition of PureEdge Solutions) and enterprise content integration. IBM's commitment to ECM as an extension of an IT organization's information management infrastructure is very much in line with the needs of IT infrastructure decision-makers.¹⁴

Strong Performers: FileNet, Interwoven, Hummingbird, Open Text, Oracle, Stellent, Vignette

- **FileNet.** FileNet P8's core strength is high-volume production imaging support, complemented by general-purpose document management, COLD and records management. The vendor lacks ECM breadth, highlighted by its relatively weak Web content management functionality, and its total lack of digital asset management. FileNet P8 does provide a consistent architecture and platform for ECM, making it one of the more suite-ready offerings in the market. FileNet's ECM strategy is more in line with the need to automate content-centric business processes than IT's focus on infrastructure. FileNet is a strong fit for organizations with high-volume production imaging needs coupled with comprehensive BPM requirements.¹⁵
- **Interwoven.** Interwoven's ECM suite comprising WorkSite, TeamSite, LiveSite, RecordsManager and MediaBin offers a broad set of ECM capabilities, highlighted by Interwoven's deep strengths in WCM, DM, and DAM. The vendor's different administration, workflow, and repository services in support of WCM and DM negatively impact Interwoven's ECM suite readiness. The vendor's ECM strategy is completely focused on meeting the content-centric needs of organizations, highlighted by current offerings for matter-centric, deal management, contract management, presentation management, eDiscovery, and other solutions. Interwoven is a superb fit for organizations with comprehensive WCM, collaboration-DM, and high-end DAM requirements.¹⁶
- **Hummingbird.** Hummingbird Enterprise's core ECM capabilities are built on a strong document management and the recently acquired WCM product from RedDot Solutions. These core building blocks are complemented by comprehensive records management and general-purpose document imaging. Although the Red Dot Solutions acquisition was a good move for Hummingbird customers and the vendor's overall competitiveness, it negatively impacts Hummingbird's ECM suite readiness in the short term. Hummingbird does provide extended capabilities that include team collaboration, enterprise search, and content integration capabilities. Hummingbird's ECM strategy is built around providing content-centric apps, and is highlighted by the vendor's introduction of deal management, contract management, and correspondence management solutions. This ECM strategy is also buoyed by a strong partner network that complements Hummingbird's ECM suite with geographic and vertical market domain expertise to support customer implementations. Hummingbird is best suited for organizations looking for document and records management and Web content management with a specific focus on end user usability.¹⁷

- **Open Text.** Open Text's Livelink ECM platform provides a broad ECM suite of capabilities, created largely through acquisition. Open Text has adopted SOA to help assemble its acquisitions into a generally consistent suite. Open Text's ECM strategy is focused on providing a broad platform for ECM, complemented by the vendor's team collaboration, enterprise search, and business process management extended capabilities. A lack of a broader IT infrastructure portfolio, and limited resources able to assist in ECM deployments, limits Open Text's ability to meet many IT infrastructure decision-maker needs. Open Text will be better served with a focus on content-centric applications versus competing for ECM infrastructure mindshare.¹⁸
- **Oracle.** Oracle's Content Services 10g targets "content management for the rest of us" with very low cost, general-purpose document management and records management components that are also embedded in Oracle Collaboration Suite. Oracle lacks a full ECM suite, but provides a strong platform for ECM built on the vendor's application infrastructure and RDBMS technologies. Oracle provides a broad set of extended capabilities, including comprehensive team collaboration, enterprise search, and content integration — through the recent acquisition of Context Media.¹⁹ Oracle's strategy to position ECM as an extension of an IT organization's core information management and collaboration infrastructure is in line with the needs of IT decision-makers.²⁰
- **Stellent.** Stellent's Universal Content Management ECM suite offers broad ECM capabilities with deep strengths in Web content management and document management for intranets, and no capability gaps. The vendor scores high suite readiness marks for an ECM suite built on a single platform with a common set of services. Stellent's lack of extended capabilities and content-centric product strategy — highlighted by the vendor's compliance and records management offering — limits the ECM suite's appeal as an ECM infrastructure offering. However, Stellent's strong current offering makes Stellent Universal Content Management a good fit for organizations looking to adopt an infrastructure independent ECM suite in the near term.²¹
- **Vignette.** Vignette's ECM suite revolves around its comprehensive, high-end Web content management and document imaging functionality, complemented by extended functionality in content integration, team collaboration, and a portal product. Vignette's suite readiness is negatively impacted by a lack of common administration and separate repository services supporting its WCM, document imaging, and document and records management products. The vendor's ECM strategy focuses on J2EE, and infrastructure-independent ECM components that can be assembled into content-centric applications. Vignette is a good fit for organizations with high-performance WCM, high-volume production imaging, and integrated document and records management requirements.²²

Contenders: Microsoft And Mobius Management Systems

- **Microsoft.** Microsoft currently lacks ECM breadth since its portfolio is limited to basic document management and a fairly non-competitive Web content management offering, both of which are separate products with independent administration and repository services. However, Microsoft's Office 12 road map and its vision for the information workplace give Microsoft a strong future in ECM.²³
- **Mobius.** Mobius Management Systems' ViewDirect TCM builds on the vendor's core strength and market presence in COLD/ERM (computer output to laser disk/enterprise report management) by adding document management, Web content management, records management, and comprehensive document imaging. But Mobius will find it difficult to compete effectively in the ECM market without raising its market awareness outside of COLD, deepening its capabilities, and easing administrative burdens for IT administrators. Mobius is a good fit for organizations with deep report management requirements and a need to complement that with ECM functionality in document imaging, records management, and content integration.²⁴

SUPPLEMENTAL MATERIAL

Online Resource

The online version of Figure 4 is an interactive tool that provides detailed evaluations and customizable rankings.

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 narrow our final list to those presented here. We chose 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 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 this document — and then score the vendors based on a clearly defined scale. These default weightings are intended only as a starting point, and readers are encouraged to adapt the weighting 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 Document management, document imaging, Web content management, digital asset management, COLD, and records management are the primary, requisite components of ECM. ECM also encompasses content integration, workflow, search, and e-forms and is highly complementary to business process management.
- ² Content-centric applications tightly integrate content and context with data to provide a more meaningful end user experience and support new classes of applications that are driven by content. These applications not only tightly integrate content and context with data, but also recognize content is the key element influencing an end user's behavior. ECM technology is also a key component of information management infrastructure, helping to tie data and content together to provide more meaningful information. See the September 26, 2002, Planning Assumption "The Third Wave Of Content Management: The Emergence Of Content-Centric Applications," and see the July 11, 2003, Planning Assumption "The Architecture Of Content-Centric Applications," and see the July 12, 2005, Best Practices "A New Perspective On Information Management."

- ³ ECM is more than just a description of technology, it has emerged as a new approach for how an organization should manage their unstructured content and support their structured and collaborative process needs and, when combined with other technologies more holistically, address the needs of an organization's information workers. See the April 5, 2002, Planning Assumption "Enterprise Content Management: A Comprehensive Approach For Managing Unstructured Content" and see the June 1, 2005, Forrester Big Idea "The Information Workplace Will Redefine The World Of Work — At Last!"
- ⁴ While simplicity and reduction of IT complexity is the goal of many ECM initiatives, today's reality is that many ECM suite offerings cannot effectively address the divergent needs of IT and lines of business. Line-of-business users demand best-of-breed capabilities, yet no single ECM vendor can provide best-of-breed across all aspects of ECM. See the January 18, 2005, Tech Choices "The Enterprise Content Management Dilemma: Point Solution Or Suite?"
- ⁵ ECM vendors including EMC/documentum, FileNet, IBM, Interwoven, Open Text, Vignette, and others aggressively pursued organic development and strategic mergers and acquisitions to assemble their own ECM portfolio. Many of these vendors are still in the second of four stages in ECM growth, rationalizing their newly acquired assets in an attempt to provide organizations with a single ECM offering. See the January 13, 2004, Planning Assumption "Will The Real Enterprise Content Management Please Stand Up?"
- ⁶ In a recent survey of 60 IT infrastructure decision-makers, a majority now see core ECM capabilities such as document management as critical collaboration infrastructure functionality. See the September 1, 2005, Trends "Collaboration Infrastructure Will Absorb Document Management For Workgroups."
- ⁷ Business process management has emerged as a key technology that organizations are adopting to improve the effectiveness of core business processes. Content integration has also emerged as a key enabling technology to help organizations access heterogeneous, disparate content repositories throughout their organization. Both technologies are important, complementary areas to ECM. See the February 2, 2004, Planning Assumption "Market Overview: Business Process Management," and see the March 26, 2004, Trends "The Content Integration Imperative."
- ⁸ Evaluations of extended capabilities including team collaboration, business process management, content integration, enterprise search, and e-forms should not be considered as thorough evaluations of these distinct technologies. Higher scores in these extended capability criteria does suggest the vendor offers an independent product that can be evaluated on its own merits.
- ⁹ EMC Documentum 5.3 release added new search features that make the vendor a credible vendor in the enterprise search landscape. EMC Documentum 5.3 combines unified repository search, powered by the vendor's OEM of Fast Search and Transfer, with native federated search capabilities to address enterprise search requirements. See the April 11, 2005, Quick Take "EMC/documentum Grabs For More Of The Enterprise Through Federated Search."
- ¹⁰ Interwoven and eDiscovery software and services provider Fios recently partnered to offer organizations a solution to manage the full life cycle of electronic evidence. On August 17, 2005, Interwoven announced its acquisition of Scrittura. Scrittura provides document management and document automation solutions

targeted specifically at over-the-counter derivative automation needs of financial services organizations. See the June 13, 2005, Quick Take “Fios And Interwoven Bring Collaborative Document Management To eDiscovery” and see Interwoven’s press release on this acquisition at <http://www.interwoven.com/news/press/2005/081705otc.html>.

- ¹¹ Oracle’s Files 10g offering targets delivering comprehensive yet easy-to-use document management and records management functionality at aggressive per-user price points. See the December 10, 2004, Quick Take “Oracle Readies An Enterprise Content Management Offering.”
- ¹² On May 19, 2005, Microsoft announced its next major release of the Microsoft Office System, Office 12, will be available in late 2006. Microsoft cited employee productivity, collaboration, knowledge discovery and insight, enterprise content life cycle, and IT fundamentals as five key investment areas for this future release. See the May 19, 2005, Quick Take “Microsoft Hints At The Information Workplace For Office 12.”
- ¹³ View the scorecard summary for more detailed analysis on how EMC fared in the Q3 2005 evaluation. See the October 7, 2005, Tech Choices, “Enterprise Content Management Suites Scorecard Summary: EMC”
- ¹⁴ View the scorecard summary for more detailed analysis on how IBM fared in the Q3 2005 evaluation. See the October 7, 2005, Tech Choices, “Enterprise Content Management Suites Scorecard Summary: IBM.”
- ¹⁵ View the scorecard summary for more detailed analysis on how FileNet fared in the Q3 2005 evaluation. See the October 7, 2005, Tech Choices, “Enterprise Content Management Suites Scorecard Summary: FileNet”
- ¹⁶ View the scorecard summary for more detailed analysis on how Interwoven fared in the Q3 2005 evaluation. See the October 7, 2005, Tech Choices, “Enterprise Content Management Suites Scorecard Summary: Interwoven.”
- ¹⁷ View the scorecard summary for more detailed analysis on how Hummingbird fared in the Q3 2005 evaluation. See the October 7, 2005, Tech Choices, “Enterprise Content Management Suites Scorecard Summary: Hummingbird.”
- ¹⁸ View the scorecard summary for more detailed analysis on how Open Text fared in the Q3 2005 evaluation. See the October 7, 2005, Tech Choices, “Enterprise Content Management Suites Scorecard Summary: Open Text.”
- ¹⁹ Oracle acquired key assets from enterprise content integration vendor Context Media in June 2005. The acquisition adds important middleware capabilities that support the direct integration and migration of content from disparate, heterogeneous repositories to Oracle’s Content Services 10g. See Oracle’s announcement information regarding this acquisition at <http://www.oracle.com/contextmedia/index.html>.
- ²⁰ View the scorecard summary for more detailed analysis on how Oracle fared in the Q3 2005 evaluation. See the October 7, 2005, Tech Choices, “Enterprise Content Management Suites Scorecard Summary: Oracle.”
- ²¹ View the scorecard summary for more detailed analysis on how Stellent fared in the Q3 2005 evaluation. See the October 7, 2005, Tech Choices, “Enterprise Content Management Suites Scorecard Summary: Stellent.”

- ²² View the scorecard summary for more detailed analysis on how Vignette fared in the Q3 2005 evaluation. See the October 7, 2005, Tech Choices, “Enterprise Content Management Suites Scorecard Summary: Vignette.”
- ²³ View the scorecard summary for more detailed analysis on how Microsoft fared in the Q3 2005 evaluation. See the October 7, 2005, Tech Choices, “Enterprise Content Management Suites Scorecard Summary: Microsoft.”
- ²⁴ View the scorecard summary for more detailed analysis on how Mobius fared in the Q3 2005 evaluation. See the October 7, 2005, Tech Choices, “Enterprise Content Management Suites Scorecard Summary: Mobius.”

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