

ECM RADAR 2014/2015

Evaluating and positioning leading providers on the
German, Austrian and Swiss ECM markets



Publisher

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About the authors



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In his capacity as senior analyst at Pentadoc Consulting AG, he is in charge of the „Radar“ business area. His responsibilities range from analysing markets and trends and conducting software comparison tests in the various areas of ECM right through to the provision of corporate consulting services with a particular emphasis on developing and implementing strategies for the various aspects of information management.



Angelina Sokolowski is a member of the Pentadoc Radar team and has been working there as an analyst for three years.

She specialises in document management, enterprise content management (ECM) and input management. Her duties encompass everything from analysing markets and conducting software comparisons right through to the provision of corporate consulting services with a particular emphasis on designing and carrying out user training for the different facets of information management.



Karl-Ludwig Schmitz has spent more than three decades working in a variety of enterprise content management and business automation roles. He has been working as a senior consultant and project manager at Pentadoc Consulting AG for the past eight years.

His key areas of responsibility are enterprise content management (ECM) and business automation (BA) as well as issues relating to strategic organisational development and process-related knowledge management at companies and institutions. Another part of his remit is to produce market and trend analyses and to carry out software comparison tests in the various areas of ECM.

Acknowledgements

We would like to express our deep gratitude to all the participating vendors and employees involved for their willingness to contribute, for sharing so much information and for showing so much commitment during the testing process.

We would also like to extend our sincere thanks to all the reference customers who took the time to provide such a comprehensive report and to share their experiences in so many different ways.

On behalf of the entire project team

Maximilian Gantner
Senior Analyst and Head of Pentadoc Radar

1. MANAGEMENT SUMMARY

The Pentadoc ECM Radar is a way of classifying leading ECM software vendors on the basis of defined criteria. This annual market study provides a representative overview of the range of solutions that are available, with a particular emphasis on the software market in Germany, Austria and Switzerland. Compared with the market structures in other regions, those in Europe are not uniform. Rather, they all shaped by their own regional, social, economic and legal idiosyncrasies. In light of the regional make-up of the European markets, providers have to achieve a high level of market proximity.

In the DACH region (comprising Germany, Austria and Switzerland), the structure of the ECM market is extremely heterogeneous and the providers there can be grouped together under different categories. There are a few large software providers with a portfolio that is comprehensive enough to cover the entire information management segment. In addition, there are many medium-sized providers of ECM suites. Aside from those, there are all kinds of specialists and niche providers vying for position on the market. There has been a high level of demand for powerful information management products for many years now. As a result, the market is highly conducive to sustaining the heterogeneous provider structure. It remains highly unlikely that we will see any clear consolidation of the market in the near future.

It is precisely because of this complex market situation that corporate users often find it difficult to find their way around the large number of software vendors. The Pentadoc ECM Radar focuses specifically on developments within the German-speaking economic area and serves as a useful guide to this

market. Overall, vendors are classified using a range of categories that reflect levels of satisfaction among their customers, their current market position, the maturity of their products and their capacity for innovation. Because it relies on standardised and objective methods of information collection and analysis, the ECM Radar provides an impartial overview of the performance of the market player's offering and where exactly it is positioned.

At the heart of the diagram are the circles of the radar, which indicate the respective market position. These concentric circles help to distinguish between the following provider categories: „market entrant“, „contender“, „expert“ and „market leader“. The closer to the centre of the ECM Radar that a software vendor manages to get, the better its respective market position (in conjunction with the general performance of the product portfolio). The position of a particular provider is marked with a dot. These dots are different sizes to indicate where the provider falls on the ECM performance index, which covers the following perspectives: „product portfolio“, „capacity for innovation“, „forward-looking orientation“ and „customer satisfaction“.

The market for information management solutions has undergone several changes since the ECM Radar was first published in 2013. Firstly, some additional vendors have now been added to the diagram in the form of Allgeier, Hyland, Microsoft and windream. If last year's results are scrutinised and compared with the ones for this year, it becomes immediately clear that some of the dots on the ECM Radar have shifted and changed. While some providers succeeded in impro-

ving their market position and public image, others were unable to hold onto their previous year's position for a variety of reasons. To a certain extent, shifts of this kind may be explained by the corporate objectives or strategic direction of the vendor concerned. However, some differences between providers are also clearly attributable to development of the product portfolio and to how the product roadmap from the previous year has been implemented.

In 2014/15, the EMC vendors that occupied the market leading positions within the DACH region were, once again, OpenText and (trailing slightly further behind) IBM. Both vendors are global players and have had an established presence on the ECM market for many years. They offer a complete portfolio of functionally mature products.

Four German ECM vendors – d.velop, ELO, OPTIMAL SYSTEMS and SER – are now positioned as experts. ELO Digital Office and OPTIMAL SYSTEMS, in particular, saw an improvement in their market position. All the experts are strategically pursuing the market leaders.

EASY SOFTWARE, Microsoft and windream are on the cusp between the „contenders“ and „experts“ categories, which means that they have experienced considerable development compared with last year. Alfresco, Allgeier, Fabasoft and Perceptive Software have all moved into the „contenders“ group. This year, there is a new market entrant in the form of Hyland. Although this company is not yet very active on the DACH market, it is able to draw on many years of expertise (e.g. on the American market).

2. Procedure

The position of each vendor was determined on the basis of the weighted score they achieved for the key figures of „market position“ and „ECM performance“ as outlined below. The ECM Radar is an impartial and objective method for assessing the performance and, in turn, the market positioning of ECM vendors within the DACH region. Even before the data was collected, the companies that were going to be included in the assessment were informed about the method and the testing phases that would have to be completed. Companies were included subject to the following requirements: they had to be active in the DACH region as a vendor of an ECM solution comprising – by way of minimum components – an electronic archive, a workflow module plus document and record management solutions; they had to be able to demonstrate a minimum number of customers in Germany, Austria and Switzerland; they had to be listed as one of the top companies in the DACH region in accordance with the Pentadoc Radar market survey and the market share calculated as part of this.

The position of each vendor was determined on the basis of the weighted score they achieved for the key figures of „market position“ and „ECM performance“ as outlined below.

2.1 Market position

Market position was assessed on the basis of each vendor's market share and turnover trend. These were calculated by taking the annual business turnover most recently recorded for the ECM segment and the turnover trend for the last three business years and using them as key figures. This data was collected by looking at the information disclosed by the vendor and comparing it with the figures held by Pentadoc. If a discrepancy of more than 15 per cent was identified, evidence was requested to back up the information disclosed. In all other cases, the average was taken from the available key figures. A calculation formula was then applied to convert the market position into a percentage. In turn, this was used to classify the company and show it on the diagram.

2.2 ECM performance

„ECM performance“ is a key figure that has been specially developed by Pentadoc Radar for the purpose of mapping the „product portfolio“, „capacity for innovation“, „forward-looking orientation“ and „customer satisfaction“ criteria. ECM performance is based on the results of customer surveys, key figures from interviews with vendors and an analysis of a criteria catalogue. The „ECM performance“ key figure is illustrated graphically by the size of the dot on the ECM Radar but, to a certain degree, it also affects the vendor’s general position as well.

To enable us to assess the product portfolio, each vendor was asked to respond to an extensive criteria catalogue questionnaire, which was divided into the following segments:

- Acquisition
- Document management
- Workflow
- Integration
- Architecture
- System management and administration

All the criteria catalogues were carefully revised by our team of analysts and checked for possible ambiguities and mistakes. All obvious problems and queries were settled by talking to the vendors directly and in cases of doubt verification was sought. The criteria catalogues that were ultimately used were assessed by awarding points and applying a weighting to each positive criterion.

Customer satisfaction was measured by using an evaluation catalogue to conduct telephone interviews with reference customers of the respective vendors and with long-standing customers of Pentadoc. By surveying our own customers, we were able to ensure a high degree of objectivity. Capacity for innovation and forward-looking orientation were assessed on the basis of the responses from vendors that had emerged and been provided in the course of interviews with management and product management.

As a basic principle, every assessment phase for each of the vendors was overseen by at least two analysts, who carried out their assessment independently of one another. At all times, the top priority was to ensure that the assessment was carried out objectively while leaving the specific products out of the equation.

2.3 Changes compared to the 2013 ECM Radar

The 2014/2015 ECM Radar features 14 vendors that meet the requirements described above. This means that four extra providers have been added to this year's edition: Allgeier, Hyland, Microsoft and windream. Furthermore, a change has occurred among the software vendors who already featured last year. SAPERION – which still appeared on the radar in 2013 – has now been taken over. For this reason, it has been replaced by Perceptive Software, which has been added to the diagram along with its entire product portfolio.

Thus, the 2014/2015 ECM Radar shows the following providers:

- Alfresco
- Allgeier IT Solutions
- d.velop
- EASY SOFTWARE
- ELO Digital Office
- Fabasoft
- Hyland Software
- IBM
- Microsoft
- OpenText
- OPTIMAL SYSTEMS
- Perceptive Software
- SER Solutions
- windream

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ECM Radar

The circles of the radar form the basis of the ECM Radar. They are used to show the ECM vendors at precisely defined positions. The market position of each ECM provider is clearly distinguished according to whether it is classed a market entrant, a contender, an expert or a market leader. The individual stages are depicted as circles on the ECM Radar and get progressively higher as a company moves towards the centre.

Each tested ECM provider is assigned a dot on the ECM Radar. These dots vary in size to indicate the ECM performance of each provider. The dot size is based on a four-level scale and the bigger the size of the dot, the better the ECM performance of the ECM solution concerned.



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SER Solutions Deutschland

The Doxis4 ECM platform from SER Solutions Deutschland (based in Bonn) is a comprehensive modular solution covering the core areas of information management. SER's portfolio of products is rounded off by further expert and industry-specific solutions. It develops these on the basis of its many years of market expertise and gears them precisely towards customer requirements. As a provider, it relies exclusively on direct distribution for the purpose of reaching its customers, who are mainly from the top end of the medium-sized segment or consist of large companies. As a result, the level of customer satisfaction achieved by SER is above average for the market. As a vendor on the DACH market, it enjoys a good market position and has evolved very successfully over recent business years.

The Doxis4 iECM suite is a powerful and technologically mature platform that is very easy to integrate into existing IT infrastructures and other business software segments, such as ERP and CRM solutions or Office applications.

The extremely wide range of functions that the product offers as standard are particularly worth noting. These are supplemented by extensive and flexible customisation options to accommodate virtually all the requirements that modern information management solutions are expected to meet.

When it comes to combining digital record management solutions with the context-based collection of information, the SER products really come into their own thanks to their intelligent and integrative approaches; in particular, the entire platform has been extensively improved by completely redeveloping the workflow component and how it is integrated into the overall architecture.

The Doxis4 interfaces are user-friendly and clearly laid out, and they are all structured in exactly the same way across the various different types of client. As evidence of this, SER can point to the high level of user acceptance that has been seen time and time again

within the context of customer projects.

SER concentrates on classic aspects of information management and for the purpose of collaboration, it relies on the use of project rooms and the concept of splitting documents between teams; however, it seems slightly reluctant to address social business scenarios in this regard.

One of the challenges for SER is to press ahead with its internationalisation strategy, which will require constant efforts to establish an effective network of partners in the defined target markets. The vendor has made this one of its strategic objectives for 2015 and has already started tackling it, as demonstrated by the wide range of languages now supported by the product.

Equally, the visibility and presence of the SER brand must be further enhanced within the German-speaking world so that it can truly live up to its claim of being a vendor with a varied portfolio of powerful products.

If you examine how SER Solutions has evolved and look at where it is now, it becomes clear that various components of the product have been enhanced. With its newly developed process management component, SER will be able to eliminate one of the weaknesses of its portfolio and position itself strongly on the market in this regard by introducing a powerful and flexible module. The company's desire to innovate can be seen in various areas of the portfolio and there is scope for this to increase even further in the future. Once again, SER Solutions Deutschland can be classed as an expert on the German-speaking ECM market using the ECM Radar. The market position of this provider remains strong. SER has a good chance of increasingly differentiating itself from its competitors by further developing the product portfolio.