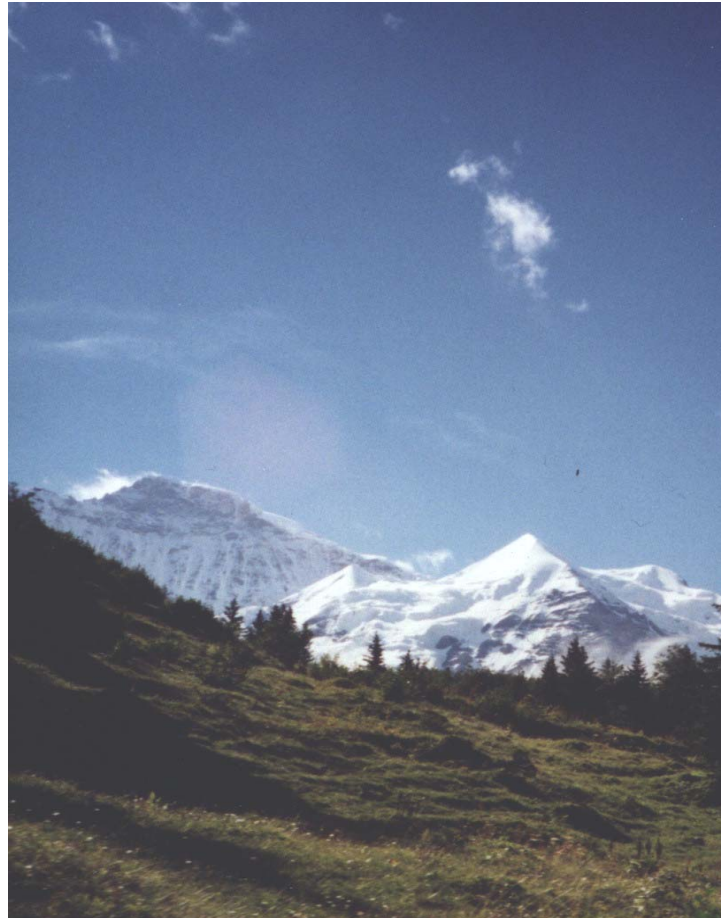


Content Management Market Shares, Strategies, and Forecasts, 2008 to 2014

Content Management Infrastructure



Picture by Susie Eustis

MOUNTAINS OF OPPORTUNITY

WinterGreen Research, Inc.

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Lexington, Massachusetts

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CHECK OUT THESE KEY TOPICS

ENTERPRISE CONTENT MANAGEMENT

ECM

DIGITAL ASSET MANAGEMENT

DAM

WEB CONTENT MANAGEMENT

WCM

COLLABORATION

REPOSITORIES

SEARCH

RECORDS MANAGEMENT

COMPONENT MANAGEMENT

CACHE

Compliance

Content Management Application Server

Imaging

Web 2.0 Workflow

Call Service Controller

Instant Messaging (IM)

Voice

Video

Collaboration

Workflow

INTELLIGENT CONTENT MANAGEMENT

SOCIAL NETWORKING RUNTIME PLATFORM

PORTALS CONTENT MANAGEMENT TECHNOLOGY

ENTERPRISE MANAGEMENT

OPPORTUNITY ABOUNDS

WinterGreen Research, Inc.

Lexington, Massachusetts

www.wintergreenresearch.com

Enterprise Content Management Market Strategies, Market Shares, and Market Forecasts, 2008-2014

WinterGreen Research announces that it has a new study on enterprise content management markets. Systems are poised for significant growth as people move to purchase for new marketing and Web based applications based on XML and Web technologies.

Enterprise content management (ECM) systems are basic infrastructure for unstructured information. Unstructured information is becoming more structured as it is tagged with XML tags and managed in components enabling reuse and repurposing of content.

Content management is a central aspect of growing any business and staying competitive. Because content management provides access to information that can be used for decision making, the indexing and tagging systems become a significant aspect of determining usefulness.

Enterprise content management solutions help corporations organize, control and access vital business image and video content useful for designing marketing campaigns. Enterprise content management solutions matters to corporate IT because there are ever-increasing volumes of information, mounting regulatory requirements, and legislative pressure to provide information in a manner that is responsive to requests.

Supplier consolidation is driven by the movement of enterprise content management (ECM) to more complex infrastructure that requires ever increasing integration of systems. Disparate applications work with isolated repositories and these systems need to be integrated. Caching systems are evolving inside repository systems to speed up delivery of information. Alternative delivery systems are creating flexibility for document and content capabilities. The entry of software as a services (SaaS) players and open source players changes the market by giving Web 2.0 market participants strategic advantage.

Content management relates to finding accurate information easily and to finding information that is not outdated. Clients and support teams report that the quantity of content is a problem. Being overwhelmed with too much old information relates to bad decision making and flawed conclusions.

User problems with technical content are common. The problem is that sometimes users cannot find information quickly; they cannot understand it or cannot tell if it's current if they do find it, and information may be inconsistent. Good content management systems eliminate this possibility.

Enterprise content management is the base for a Web 2.0 strategy. Unification and structure for non-transactional information is needed in Web 2.0 environments. Web 2.0 is a lot of things -- it is image and video centric, it is social networking, it is runtime engines that are worked on by programmers 24x7, it is blogs, it is wikis, it is collaboration software, and it represents dynamic implementation of presentation logic.

Information is doubling at a rate of once every 7 months and this rate of increase is growing. Enterprise content management permits users to integrate a diverse set of technologies into a coherent product portfolio. The enterprise content management markets are anticipated to have exponential growth in content generation management and replication. Content-centric collaboration within enterprises is used to deploy technology solutions to address the information accumulation challenge.

Enterprise content management markets at \$3.4 billion in 2007 are anticipated to triple to \$9.3 billion by 2014. Revenue from the worldwide ECM market is anticipated to grow at 19% through 2014 in response to new analytics that permit improved decision making.

The ability to access information more rapidly, and to use that information to make informed decisions, is part of automated process. Initiatives that use text to implement services oriented architecture (SOA) services are anticipated to create a climate for growth of content management services. In this context documents may be text based, image based, video content, or software system modules. All the modules require management and indexing.

Companies Profiled

Market Leaders

IBM

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**EMC
OpenText
MicroSoft
Interwoven**

Market Participants

**Adobe / Macromedia
Alfresco
Autonomy Group / Verity
Blue Coat Systems
Ektron
EMC / Documentum
FatWire
Hewlett Packard / Tower Software
IBM / WebSphere SOA / FileNet
Informatica
Intel / Sarvega
Interwoven
JustSystems
Magnus Group / Vasont
Microsoft / SharePoint
OpenText / Artesia / RedDot
Oracle / Stellent
Percussion
Tibco
Terremark
Thoma Cressey Bravo / Hyland Software
TigerLogic Corporation
Vignette
Yash
Younts Consulting**

Content Management Market Shares, Strategies, and Forecasts, 2008-2014

THIS IS THE 357TH REPORT IN A SERIES OF MARKET RESEARCH REPORTS THAT PROVIDE FORECASTS IN COMMUNICATIONS, TELECOMMUNICATIONS, THE INTERNET, COMPUTER, SOFTWARE, TELEPHONE EQUIPMENT, HEALTH EQUIPMENT, AND ENERGY. THE PROJECT LEADERS TAKE DIRECT RESPONSIBILITY FOR WRITING AND PREPARING EACH REPORT. THEY HAVE SIGNIFICANT EXPERIENCE PREPARING INDUSTRY STUDIES. FORECASTS ARE BASED ON PRIMARY RESEARCH AND PROPRIETARY DATA BASES. FORECASTS REFLECT ANALYSIS OF THE MARKET TRENDS IN THE SEGMENT AND RELATED SEGMENTS. UNIT AND DOLLAR SHIPMENTS ARE ANALYZED THROUGH CONSIDERATION OF DOLLAR VOLUME OF EACH MARKET PARTICIPATION IN THE SEGMENT. INSTALLED BASE ANALYSIS AND UNIT ANALYSIS IS BASED ON INTERVIEWS AND AN INFORMATION SEARCH. MARKET SHARE ANALYSIS INCLUDES CONVERSATIONS WITH KEY CUSTOMERS OF PRODUCTS, INDUSTRY SEGMENT LEADERS, MARKETING DIRECTORS, DISTRIBUTORS, LEADING MARKET PARTICIPANTS, OPINION LEADERS, AND COMPANIES SEEKING TO DEVELOP MEASURABLE MARKET SHARE. OVER 200 IN DEPTH INTERVIEWS ARE CONDUCTED FOR EACH REPORT WITH A BROAD RANGE OF KEY PARTICIPANTS AND INDUSTRY LEADERS IN THE MARKET SEGMENT. WE ESTABLISH ACCURATE MARKET FORECASTS BASED ON ECONOMIC AND MARKET CONDITIONS AS A BASE. USE INPUT/OUTPUT RATIOS, FLOW CHARTS, AND OTHER ECONOMIC METHODS TO QUANTIFY DATA. USE IN-HOUSE ANALYSTS WHO MEET STRINGENT QUALITY STANDARDS. INTERVIEWING KEY INDUSTRY PARTICIPANTS, EXPERTS AND END-USERS. OUR RESEARCH INCLUDES ACCESS TO LARGE PROPRIETARY DATABASES. LITERATURE SEARCH INCLUDES ANALYSIS OF TRADE PUBLICATIONS, GOVERNMENT REPORTS, AND CORPORATE LITERATURE.

Mission Statement:

WinterGreen Research is an independent business research organization funded by sale of market research, competitive analysis, and return on investment studies all over the world. Research is conducted with integrity and independence that is supported by the revenue from the sale of studies by a distribution network. The company seeks to support its distribution network. The company is dedicated to its customers, to helping those customers grow and understand markets as the markets change and evolve. Automation of process is a central focus for the WinterGreen Research company.

Research is centered on new markets, evolving markets, and change in markets. Markets for new products depend on successful trials. Initial trials create a sounding board for a new product direction. Market growth for new products and services depends on

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completion of 100 successful trials with real paying customers. WinterGreen Research tracks those trials in various industries and the impact of the trials by talking to people.

YOU MUST HAVE THIS STUDY

Enterprise Content Management Market Shares, Strategies, and Forecasts, 2008 to 2014

Table of Contents

ENTERPRISE CONTENT MANAGEMENT EXECUTIVE SUMMARY

ENTERPRISE CONTENT MANAGEMENT MARKET SHARES AND FORECASTS	ES-1
Content Management Market Driving Forces	ES-1
Content Management Market Driving Forces	ES-2
Web 2.0	ES-4
Content Control Frameworks	ES-5
Internet As A Critical Sales, Service And Communications Channel	ES-6
Enterprise Content Management Markets - Total	ES-9
Enterprise Content Management Market Shares	ES-10
Enterprise Content Management Solutions	ES-11
IBM Achieves Content-Centric BPM	ES-11
EMC	ES-12
Microsoft SharePoint Protects Content So That It Is Accessible And Readable Years From Now	ES-13
Enterprise Content Management Market Forecasts	ES-13

ENTERPRISE CONTENT MANAGEMENT MARKET DESCRIPTION AND MARKET DYNAMICS

1. CONTENT MANAGEMENT MARKET DESCRIPTION AND MARKET DYNAMICS	1-1
1.1 Content Management In Different Size Organizations	1-1
1.1.1 Rapid Product Introductions And Multi-Channel Marketing Campaigns	1-3
1.1.2 Digital Technology Information Sharing For Business Functions	1-4
1.1.3 Content Management Used To Index And Coordinate Unstructured Data	1-4
1.1.4 Lifecycle Control of Content	1-6
1.2 Web Publishing	1-8
1.2.1 Web Publishing Depends on Improved Security	1-10
1.2.2 Web Content Management System Cultural Collision	1-10

REPORT # SH29821665 728 PAGES 251 TABLES AND FIGURES 2008 \$3,300

1.2.3	Web Content Management System	1-11
1.3	Master Data Content Management	1-12
1.4	Digital Asset Brand Management Capabilities	1-14
1.4.1	Management Requirements Imposed on Builder Role	1-18
1.4.2	User Interface Customization	1-20
1.4.3	User Customized Wizards May Not Map	
	To A Particular Process	1-21
1.4.4	Work Queues	1-21
1.4.5	Help Subsystem	1-23
1.4.6	Usability Requirements Model Builder	1-24
1.4.7	Key Content Management Product Features	1-24
1.5	Content Management To Leverage Value Of Information	1-28
1.5.1	Content Management Of Software Modules	1-29
1.5.2	Content Management Positioned To Give Meaning	
	And Value To Information Systems	1-29
1.5.3	Enterprise Content Management Information	
	Technology Needs 1-30	
1.5.4	Content Management Economic Benefit	1-32
1.6	Eco Systems Drive Content Management	1-35
1.6.1	Storage	1-36
1.7	Content Management vs. SOA Integration	
	Implementations	1-37
1.7.1	Standardization Of Interfaces	1-38
1.8	Target Markets	1-39
1.9	Authoring Tool Technology Vendors	1-39
1.10	Systems Integrator Service Providers	1-40
1.11	Customer Implementations	1-41
1.12	Content Management Positioning	1-41
1.13	Content Management Requirements	1-48
1.13.1	Control The Process	1-49
1.14	Addressing the Content Lifecycle Challenge	1-49
1.15	Advanced Deployment Server	1-50
1.16	Content Management Industry Background	1-54
1.17	Storage Content Management Solutions	1-55
1.18	E-Commerce In Emerging Economies	1-56
1.19	Payment Standards For e-Commerce	1-57
1.20	Portal Management	1-58
1.21	E-Government Challenge	1-58
1.22	Internet Site Management	1-60
1.23	Business And Personal Travel Planning	1-61

ENTERPRISE CONTENT MANAGEMENT MARKET SHARES AND MARKET FORECASTS

2. ENTERPRISE CONTENT MANAGEMENT	
MARKET SHARES AND FORECASTS	2-1
2.1	Content Management Market Driving Forces 2-1
2.1.1	Content Management Market Driving Forces 2-2
2.1.2	Web 2.0 2-4
2.1.3	Content Control Frameworks 2-5
2.1.4	Internet As A Critical Sales, Service

And Communications Channel	2-6
2.2 Enterprise Content Management Markets - Total	2-9
2.2.1 Enterprise Content Management Market Shares	2-10
2.2.2 IBM 2-12	
2.2.3 EMC 2-14	
2.2.4 Open Text	2-15
2.2.5 Interwoven	2-16
2.2.6 Microsoft Sharepoint	2-18
2.2.7 Oracle	2-19
2.2.8 Hyland Software	2-20
2.2.9 Vignette	2-20
2.2.10 Vignette Caching Technology	2-21
2.2.11 Enterprise Content Management Market Forecasts	2-21
2.2.12 Enterprise Content Management Market Segments	2-26
2.2.13 Open Source Software-As-A-Service (SaaS)	2-29
2.2.14 Small and Mid Size Business Content Management	2-29
2.2.15 Co Content-Aware Business Applications	2-30
2.2.16 Life Sciences And Healthcare	2-31
2.2.17 Newspapers	2-31
2.2.18 Web Site Content Management	2-32
2.2.19 Channel and Solution Providers	2-32
2.3 Content Management and Services	
Oriented Architecture (SOA)	2-33
2.3.1 IBM Sets Defacto Industry Standard For SOA	2-35
2.3.2 SOA Market Shares	2-36
2.3.3 Business Integration Positioned As SOA Middleware	2-38
2.4 Enterprise Content Management Solutions Segments	2-39
2.5 High End Enterprise Content Management Solutions	2-43
2.5.1 Content Lifecycle	2-43
2.5.2 Storage Content Management Solutions	2-46
2.5.3 System Reliability Return On Investment	2-51
Advantage Mainframe	2-52
2.5.4 Integration	2-53
2.5.5 Sarbanes-Oxley	2-53
2.6 Mid Range Enterprise Content Management Solutions	2-54
2.7 Digital Asset Management	2-58
2.7.1 Imaging Content Management Market	2-64
2.8 Internet Site / Web Content Management	2-65
2.8.1 Web Content Management Market Forecasts	2-68
2.8.2 Web Content Management Frameworks	2-72
2.9 Computer Output Content Management (COLD) Markets	2-76
2.9.1 Computer Output Content Management (COLD) Market Shares	2-78
2.9.2 Computer Output Content Management Market Forecasts	2-81
2.9.3 Computer Generated Content Management Markets – Units and Dollars	2-82
2.10 Content Management Pricing and Market Aspects	2-86
2.10.1 Interwoven Content Management Pricing	2-86
2.10.2 Enterprise Content Management Suites Core Components	2-86
2.10.3 Unstructured Data And Document Management Market Trends	2-97
2.11 Content Management Regional Analysis	2-99
2.11.1 Open Text solutions	2-103
2.11.2 Asia Pacific Content Management Market	2-104

ENTERPRISE CONTENT MANAGEMENT PRODUCT DESCRIPTION

3. CONTENT MANAGEMENT PRODUCT DESCRIPTION	3-1
3.1 IBM / FileNet	3-1
3.1.1 IBM FileNet Content Manager	3-2
3.1.2 IBM Dominates SOA Market	3-6
3.1.3 IBM Building a Robust Data Integration Layer	3-8
3.1.4 IBM SOA Market Segment	3-9
3.1.5 IBM Content Management SOA BPM	3-9
3.1.6 IBM Content Manager	3-10
3.1.7 IBM Content Manager OnDemand	3-12
3.1.8 IBM FileNet Image Manager (Active Edition)	3-13
3.1.9 IBM FileNet Content Services	3-15
3.1.10 IBM FileNet Connectors for SharePoint	3-17
3.1.11 IBM Content Management portfolio	3-18
3.1.12 IBM FileNet Content Federation Services	3-18
3.2 OpenText	3-19
3.2.1 OpenText Real Estate Positioning Challenges	3-23
3.2.2 Open Text Supports Organizational Trust	3-25
3.2.3 OpenText ECM	3-26
3.2.4 OpenText Business Intelligence	3-28
3.2.5 OpenText Business Process Management	3-28
3.2.6 OpenText Compliance & Governance	3-29
3.2.7 OpenText HummingBird Connectivity	3-31
3.2.8 OpenText Contract Management	3-32
3.2.9 OpenText Data Integration	3-33
3.2.10 OpenText Artesia Archiving and Imaging	3-34
3.2.11 OpenText Artesia Digital Asset Management	3-36
3.2.12 OpenText Document Management & Collaboration	3-37
3.2.13 OpenText eLearning & Corporate Training	3-41
3.2.14 OpenText eMail	3-42
3.2.15 OpenText Enterprise Portals	3-44
3.2.16 OpenText Extensions for Lotus Notes	3-44
3.2.17 OpenText Extensions for Microsoft	3-45
3.2.18 OpenText Extensions for Oracle	3-47
3.2.19 OpenText Extensions for SAP Solutions	3-49
3.2.20 OpenText Knowledge Management	3-51
3.2.21 OpenText Project Management	3-53
3.2.22 OpenText Record Management	3-54
3.2.23 OpenText Report and Output Management	3-57
3.2.24 OpenText Transactional Content Management	3-58
3.2.25 OpenText Unified Communications	3-60
3.2.26 OpenText Web Content Management	3-60
3.2.27 OpenText eDOCs	3-60
3.2.28 OpenText LegalKEY	3-62
3.2.29 OpenText Content Services	3-63
EMC / Documentum	3-65
3.2.30 EMC Business Process Management	3-67
3.2.31 EMC Collaboration and Document Management	3-68
3.2.32 EMC Compliance	3-70

3.2.33	EMC Content Security	3-73
3.2.34	EMC Digital Asset Management	3-74
3.2.35	EMC Document Capture	3-75
3.2.36	EMC Document Platform	3-76
3.2.37	EMC Records Management	3-78
3.2.38	EMC Report Management	3-79
3.2.39	EMC SAP Integration	3-80
3.2.40	EMC Search and Classification	3-82
3.2.41	EMC Transactional Content Management	3-83
3.2.42	EMC Web Content	3-85
3.2.43	EMC Archiving Services	3-87
3.2.44	EMC Compliance Services	3-88
3.2.45	EMC Deployment Services	3-88
3.2.46	EMC Messaging Services	3-89
3.2.47	EMC Services for Microsoft SharePoint Integration	3-89
3.3	Interwoven	3-90
3.3.1	Interwoven MediaBin Marketing Asset Management Solution	3-91
3.3.2	Interwoven TeamSite	3-93
3.3.3	Interwoven TeamSite High-performance Repository	3-94
3.3.4	Interwoven TeamSite Unified Approach	3-96
3.3.5	Interwoven TeamPortal	3-101
3.3.6	Interwoven MediaBin Digital Asset Management Solution	3-102
3.3.7	Interwoven DAM-Enabled Brand Marketing Processes	3-105
3.3.8	Interwoven MediaBin	3-106
3.3.9	Interwoven Portal Content Management	
	Integration for Marketing and IT	3-110
3.3.10	Interwoven LiveSite Delivers Content Dynamically	3-112
3.3.11	LiveSite Granular, Component-Level Caching	3-114
3.3.12	Interwoven® Composite Applications –	
	Managing Code Along With The Content Assets	3-115
3.3.13	Interwoven Optimost	3-117
3.3.14	Interwoven MediaBin	3-118
3.3.15	Interwoven Targeting	3-118
3.3.16	Interwoven LiveSite	3-120
3.3.17	Interwoven MetaTagger	3-120
3.3.18	Interwoven OpenDeploy	3-121
3.3.19	Interwoven Control Hub	3-123
3.3.20	Interwoven Team Portal	3-123
3.3.21	Interwoven WorkSite	3-124
3.3.22	Interwoven Universal Search	3-125
3.3.23	Interwoven Record Manager	3-126
3.3.24	Interwoven EnConnect	3-127
3.3.25	Interwoven Scrittura	3-128
3.4	Oracle / Stellent	3-129
3.4.1	Oracle Universal Content Management	3-131
3.4.2	Oracle UCM Web Content Management	3-132
3.4.3	Oracle UCM Document Management	3-133
3.4.4	Oracle UCM Digital Asset Management	3-134
3.4.5	Oracle Universal Online Archive	3-135
3.4.6	Oracle Universal Records Management	3-137
3.4.7	Oracle Imaging and Process Management	3-138
3.4.8	Oracle Information Rights Management	3-140
3.4.9	Oracle Outside In Technology	3-140
3.5	Microsoft	3-142
3.5.1	Open Text Livelink ECM Integration Microsoft	
	Office SharePoint Server	3-145
3.5.2	Microsoft / SharePoint	3-148
3.6	SDL	3-153

3.6.1	SDL Tridion	3-154
3.6.2	SDL Tridion Web Site Globalization	3-155
3.6.3	SDL Tridion Visual BluePrinting	3-155
3.7	Vignette	3-155
3.7.1	Vignette Content Management	3-157
3.7.2	Vignette Web Content Management	3-158
3.7.3	Vignette Portals	3-160
3.7.4	Vignette Collaboration	3-161
3.7.5	Vignette Document and Records Management	3-163
3.7.6	Vignette Imaging and Workflow	3-166
3.7.7	Vignette Community	3-167
3.7.8	Vignette Personalization	3-168
3.7.9	Vignette Accelerated Delivery Solutions	3-169
3.7.10	Vignette Interaction Management	3-169
3.7.11	Vignette Enterprise Content Integration	3-170
3.8	Magnus Group / Vasont Systems	3-171
3.8.1	Vasont Client / Server CMS for Multi-Channel Publishing	3-172
3.8.2	Vasont Remote User Interface	3-173
3.8.3	Vasont Hosted CMS for Cost-Effective Content Management	3-173
3.8.4	Vasont SG for Small Groups	3-173
3.8.5	Vasont Extensions	3-174
3.9	Magnus Group / Vasont Systems	3-174
3.9.1	Vasont Client / Server CMS Target Markets	3-175
3.10	Percussion	3-180
3.11	Hyland Software	3-181
3.11.1	Hyland Software OnBase®	3-185
3.11.2	Hyland OnBase	3-186
3.12	Fatwire Software	3-188
3.12.1	Fatwire Content Server 7 – Doclink	3-189
3.12.2	Fatwire Content Server 7 –Language Packs	3-190
3.12.3	Fatwire Content Server 7 –Satellite Server	3-190
3.12.4	Fatwire TeamUP	3-190
3.12.5	Fatwire Spark pCM	3-191
3.13	Ektron	3-191
3.14	TIBCO / Spotfire	3-193
3.14.1	TIBCO MDM – Collaborative Information Manager	3-193
3.14.2	TIBCO PortalBuilder	3-196
3.15	Adobe / Macromedia	3-197
3.15.1	Adobe GoLive	3-199
3.15.2	Adobe Contribute CS3	3-200
3.15.3	Adobe Contribute Publishing Server	3-201
3.16	Alfresco	3-201

ENTERPRISE CONTENT MANAGEMENT TECHNOLOGY

4. CONTENT MANAGEMENT TECHNOLOGY	4-1
4.1 Web 2.0	4-1
4.1.1 AJAX4-3	
4.1.2 Content Manager UI Assessments	4-5
4.1.3 User Interface Customization Scripting	4-5
4.1.4 Form Field Validation	4-6
4.2 Collaborative Document Management	4-6

4.3	Document Management Collaboration	4-11
4.3.1	Web Marketing Positioning	4-13
4.3.2	Composite Application Updates	4-15
4.3.3	Automated Deployment	4-15
4.4	Google Scale Mainstream Applications Gmail and Google Maps 4-17	
4.4.1	Google.com—Search and Personalization	4-19
4.4.2	Google Scholar.	4-20
4.4.3	Google Server Implementation for Web 2.0	4-20
4.4.4	Google Replicates The Web pages	4-21
4.4.5	Google Map / Reduce Framework Runs In Parallel On 1,000 Machines 4-24	
4.4.6	Google Global Work Queue	4-24
4.4.7	Communication, Collaboration and Communities	4-25
4.4.8	Google Spent \$250 Million On Hardware Equipment In 2004, \$1.4 Billion in 2007	4-26
4.4.9	Google Uses 1.8 Million Servers, Search Results, Images, Videos, Emails And Ads	4-29
4.4.10	Google Dynamic Architecture Implementation	4-30
4.4.11	Short Description of Google Search Engine Dynamic Architecture	4-33
4.4.12	Google BigFiles	4-34
4.4.13	Google Repository	4-35
4.5	eBay Infrastructure	4-35
4.5.1	Sun Storage Helps Keep The Store Open	4-38
4.5.2	eBay's Infrastructure Evolution	4-39
4.6	Microsoft .Net Defines Reusable Modules Dynamically	4-40
4.6.1	Microsoft Data Center Size	4-40
4.6.2	Microsoft Combines Managed Modules into Assemblies	4-42
4.6.3	Microsoft Architecture Dynamic Modular Processing	4-44
4.7	IBM® WebSphere® Application Server Feature Pack for Web 2.0 4-46	
4.7.1	IBM Web 2.0 Steps To Deploy Websphere Application Server Using Virtual Image Templates	4-46
4.8	IBM WebSphere Application Server Feature Pack	4-52
4.9	Facebook	4-54
4.10	MySpace	4-56
4.11	Reunion	4-59
4.12	Software Release Cycle	4-60
4.13	iTunes and TiVo	4-61
4.14	SIP Integration With IP And Rich Media Applications	4-61
4.14.1	Standards Based Signaling Technology Session Initiation Protocol (SIP).	4-62
4.14.2	SIP Presence	4-64
4.14.3	SIP Actions	4-64
4.14.4	SIP Helps Sales	4-65
4.14.5	SIP Trunks & Benefits	4-65
4.14.6	SIP Reduction In The Cost Of Networking	4-65
4.15	SIP PBXs' Based On Linux	4-70
4.16	Cisco SIP	4-71
4.16.1	Cisco Unified Communication System	4-71
4.17	VoIP Gateways	4-72
4.18	Avaya SIP Trunking Incoming Calls Are Proxied Through The PID4-	4-74
4.19	Bluenote	4-75
4.19.1	SOA Product Strategy At BlueNote Networks	4-76

4.19.2	SOA Representational State Transfer Is A Mode Of Communication Accessible To Programs And Humans	4-77
4.20	Enterprise Communications ROI	4-77
4.21	Femto Cell Base Station FMC Services	4-79
4.21.1	Session Border Controller (SBC)	4-83
4.21.2	SPIT Attack Simulation Project	4-84
4.22	SIP High-Availability And High-Performance Solution	4-85
4.23	Data Preservation Using IntelliCapture™ Technology	4-87

ENTERPRISE CONTENT MANAGEMENT COMPANY PROFILES

5.	ENTERPRISE CONTENT MANAGEMENT COMPANY PROFILES	5-1
5.1	Enterprise Content Management Suite Vendors	5-1
5.1.1	Major Enterprise Content Management Suite Vendors	5-2
5.1.2	Mid-Range ECM	5-3
5.1.3	Specialty MC Vendors	5-4
5.2	Adobe / Macromedia	5-5
5.2.1	Adobe Strategy	5-5
5.2.2	Adobe Digital Imaging And Digital Video	5-9
5.2.1	Adobe Customers	5-9
5.2.4	Adobe Financials	5-10
5.2.5	Adobe Ease Of Use For Information Management	5-14
5.3	Alfresco	5-15
5.4	Autonomy Group / Verity	5-18
5.5	Blue Coat Systems	5-19
5.5.1	Blue Coat Solution	5-20
5.5.2	Blue Coat Revenue	5-23
5.5.3	Blue Coat Acquisition of Packeteer	5-24
5.5.4	Blue Coat Systems Customers	5-25
5.6	Ektron	5-25
5.6.1	Ektron CMS400.NET Collaborative Community	5-26
5.6.1	Ektron Partners	5-28
5.6.3	Ektron Customers	5-28
5.6.3	Ektron Financials	5-29
5.7	EMC 5-29	
5.7.1	EMC Acquisitions	5-30
5.7.1	Selected EMC Partners	5-31
5.7.3	Selected EMC Customers	5-31
5.7.3	EMC Revenue	5-32
5.7.5	EMC Segment Information	5-33
5.7.6	EMC VMware Virtual Infrastructure	5-38
5.7.7	EMC / Unisys and Expand Relationship in Enterprise Content Management	5-48
5.8	FatWire	5-49
5.8.1	FatWire Customers	5-50
5.8.2	FatWire Partners	5-50
5.9	Hewlett Packard	5-51
5.9.1	Hewlett Packard Global Provider Of Products	5-51
5.9.2	HP Products and Services: Segment Information	5-52
5.9.3	Hewlett Packard Technology Solutions Group	5-53
5.9.4	Hewlett Packard Enterprise Storage and Servers	5-54
5.9.5	HP and Tower Software	5-55
5.9.6	Hewlett Packard Tower Software TRIM Context 6	5-58
5.10	IBM	5-64

5.10.1	IBM Partners	5-65
5.10.2	IBM ECM Customers	5-66
5.10.3	IBM Revenue	5-66
5.10.4	IBM Multinational Computer Technology	5-68
5.10.5	IBM SOA Infrastructure	5-68
5.10.6	IBM WebSphere SOA Business Integration Foundation	5-69
5.10.7	IBM 2008 Fourth-Quarter and Full-Year Revenue	5-70
5.11	Informatica	5-81
5.11.1	Informatica Partners	5-81
5.11.2	Informatica Customers	5-82
5.11.3	Informatica Financials	5-82
5.12	Intel / Sarvega	5-82
5.12.1	Sarvega	5-85
5.13	Interwoven	5-85
5.13.1	Interwoven Engagement/Matter-Centric Collaboration Solution	5-89
5.13.2	Interwoven Revenue	5-91
5.13.3	Interwoven Best Practices Persuasive Content Improves the Customer Experience	5-95
5.13.4	Interwoven Partners	5-96
5.13.5	Interwoven Partner Classifications	5-96
5.14	JustSystems	5-97
5.14	Magnus Group	5-98
5.15.1	Vasont Systems	5-98
5.15.2	Vasont Partners	5-99
5.15.3	Vasont Systems Consulting Partner / Bright Path Solutions	5-100
5.15.4	Vasont Systems Consulting Partner / Lionbridge	5-100
5.15.5	Vasont Systems Consulting Partner / Wolff and Associates, LLC. Wolff	5-101
5.15.6	Vasont Client / Server	5-101
5.15.7	Vasont ASP Model	5-102
5.15.8	Vasont	5-102
5.15.9	Progressive Information Technologies	5-103
5.16	Microsoft	5-104
5.16.1	Microsoft Revenue	5-104
5.16.2	Microsoft Client Revenue	5-105
5.16.3	Microsoft Server and Tools Revenue	5-108
5.16.4	Microsoft Online Services Business Revenue	5-109
5.16.5	Microsoft Business Division Revenue	5-112
5.16.6	Microsoft Entertainment and Devices Division	5-114
5.16.7	Microsoft Segment Revenue	5-116
5.16.8	Microsoft Competition	5-117
5.16.9	Microsoft Security Vulnerabilities	5-119
5.16.10	Microsoft Client Segment	5-121
5.16.11	Microsoft Segments	5-123
5.16.12	Open Text Livelink ECM Integration Microsoft Office SharePoint Server	5-126
5.16.13	Microsoft Multinational Computer Technology	5-126
5.16.14	Selected Microsoft Partners	5-127
5.16.15	Microsoft Financials	5-127
5.17	OpenText	5-127
5.17.1	Open Text™ As An Independent Software Vendor	5-128
5.17.2	Open Text™ Livelink ECM Product Line	5-129
5.17.3	OpenText Customers	5-133
5.17.4	Open Text Sony Alliance	5-134
5.17.5	Open Text Industry Positioning	5-134
5.17.6	Open Text Strategic Partnerships	5-135
5.17.7	Open Text Strategic Customers	5-138
5.17.8	OpenText Partners	5-160

5.17.9	Open Text Livelink ECM Integration Microsoft Office SharePoint Server	55-161
5.17.10	OpenText Revenue	5-161
5.18	Oracle / Stellent	5-163
5.18.1	Oracle Partners	5-164
5.18.2	Oracle Customers	5-164
5.18.3	Oracle Financials	5-164
5.19	Percussion	5-164
5.19.1	Percussion Partners	5-165
5.19.2	Percussion Customers	5-165
5.20	Tibco	5-166
5.20.1	Tibco Partners	5-166
5.20.2	Tibco Customers	5-167
5.20.3	Tibco Financials	5-167
5.20.4	Tibco Software Integration Software	5-167
5.20.5	Tibco Revenue	5-168
5.20.6	Tibco Revenue:	5-171
5.20.7	Tibco Fourth Quarter Revenue Fiscal 2007	5-171
5.20.8	Tibco Customers	5-172
5.20.9	Tibco Software Fourth Quarter 2007 Revenue	5-172
5.21	Terremark	5-174
5.21.1	Terremark Customers	5-174
5.21.2	Terremark Financials	5-174
5.21.3	Terremark Worldwide, Inc. Revenue	5-176
5.21.4	Terremark / Data Return	5-177
5.21.5	Terremark Worldwide Deploys Fully-Configured Production Servers in Minutes	5-177
5.21.6	Terremark Enterprise Cloud Computing	5-180
5.21.7	Terremark Revenue -- Infinistructure, Infinicenter	5-181
5.22	Thoma Cressey Bravo / Hyland Software	5-182
5.22.1	Thoma Cressey Bravo Strategy	5-183
5.22.2	Thoma Cressey Bravo Partners	5-184
5.22.3	Thoma Cressey Bravo Customers	5-184
5.22.4	Thoma Cressey Bravo Financials	5-185
5.22.5	Hyland Software	5-185
5.22.6	Hyland Software OnBase Integrated Document Management and Retrieval Solutions	5-185
5.22.7	Hyland Software Integrated Document Management and Workflow:	5-186
5.23	TigerLogic Corporation	5-189
5.23.1	TigerLogic Customers	5-190
5.24	Vignette	5-190
5.24.1	Vignette Partners	5-190
5.24.2	Vignette Customers	5-190
5.24.3	Vignette Financials	5-191
5.25	Yash	5-192
5.26	Younts Consulting	5-200

List of Tables and Figures

ENTERPRISE CONTENT MANAGEMENT EXECUTIVE SUMMARY

REPORT # SH29821665 728 PAGES 251 TABLES AND FIGURES 2008 \$3,300

Table ES-1	ES-2
Content Management Market Driving Forces	
Table ES-2	ES-7
Web 2.0 Internet Content Management Market Driving Forces	
Table ES-3	ES-10
Worldwide Content Management Software Shipments	
License and Maintenance Market Shares, Dollars, 2007	
Table ES-4	ES-14
Worldwide Enterprise Content Management (EMC)	
License, Maintenance, and Services Market Forecasts,	
Dollars, 2008-2014	

ENTERPRISE CONTENT MANAGEMENT MARKET DESCRIPTION AND MARKET DYNAMICS

Table 1-1	1-2
Content Management Digital Asset Uses	
Table 1-2	1-5
Content Management Technologies	
Table 1-3	1-6
Lifecycle Requirements For Controlling Content	
Table 1-4	1-9
Web Publishing Functions	
Table 1-5	1-17
Content Management Roles	
Table 1-6	1-20
Web Content Management System Internal User Usability Issues	
Table 1-7	1-22
Content Management Model Creation Tracking With Work Queues	
Table 1-8	1-24
Key Content Management Product Features	
Table 1-9	1-27
Types of content management	
Table 1-10	1-31
Enterprise Content Management Information Technology Needs	
Table 1-11	1-33
Key Mission Of Content Management	
Table 1-12	1-34
Content Management Architecture	
Table 1-13	1-43
Content Management Infrastructure Functions	
Table 1-14	1-44
Content Management Platform Functions	
Table 1-15	1-45
Types of Information Exchanged Using Content Management	
Table 1-16	1-46
Content Management Efficiency Targets	
Table 1-17	1-47

Advantages Of Content Management	
Table 1-18	1-48
Content Management Industry Segments Initiatives	
Table 1-19	1-51
Benefits Of Advanced Deployment Servers	
Table 1-20	1-53
Multisite Content Manager Capabilities	
Table 1-21	1-56
E-Commerce In Emerging Economies	

ENTERPRISE CONTENT MANAGEMENT MARKET SHARES AND MARKET FORECASTS

Table 2-1	2-2
Content Management Market Driving Forces	
Table 2-2	2-7
Web 2.0 Internet Content Management Market Driving Forces	
Table 2-3	2-10
Worldwide Content Management Software Shipments	
License and Maintenance Market Shares, Dollars, 2007	
Table 2-4	2-11
Worldwide Content Management Software Shipments	
License and Maintenance Market Shares, Dollars, 2007	
Table 2-5	2-22
Worldwide Enterprise Content Management (EMC)	
License, Maintenance, and Services Market Forecasts,	
Dollars, 2008-2014	
Table 2-6	2-23
Worldwide Enterprise Content Management (EMC)	
Market Forecasts, Dollars, 2008-2014	
Table 2-7	2-24
Worldwide Enterprise Content Management (EMC)	
Market Forecasts, Dollars, 2008-2014	
Table 2-8	2-25
Worldwide Enterprise Content Management (EMC)	
Market Forecasts, Dollars, 2008-2014	
Table 2-9	2-27
Worldwide Enterprise Content Management Industry	
Market Segments, 2007	
Table 2-10	2-28
Worldwide Content Management Industry	
Segments, Dollars, 2007	
Table 2-11	2-30
Co Content-Aware Business Applications Functions	
Table 2-12	2-34
Content Management and Services Oriented Architecture SOA	
Table 2-13	2-37
Worldwide Service Oriented Architecture SOA	
Engine Market Shares, 2007	
Figure 2-14	2-40
Worldwide Enterprise Content Management Solutions	

Market Segments, 2007	
Figure 2-15	2-41
Worldwide Enterprise Content Management Solutions	
Market Segments, 2014	
Table 2-16	2-42
Worldwide Enterprise Content Management (ECM) Solutions	
Market Forecasts, 2008-2014	
Figure 2-17	2-45
Worldwide High End Enterprise Content Management	
Market Shares, 2007	
Table 2-18	2-46
Worldwide High End Enterprise Content Management	
Market Shares, 2007	
Table 2-19	2-47
Worldwide High End Enterprise Content Management	
License, Maintenance, and Services Market Forecasts Dollars,	
2008-2014	
Figure 2-20	2-48
Worldwide High End Enterprise Content Management	
Market Units, 2007	
Table 2-21	2-49
Worldwide High End Enterprise Content Management	
Market Dollars and Units, 2008-2014	
Figure 2-22	2-55
Worldwide Mid Range Content Management License,	
Maintenance, and Services Market Forecasts Dollars,	
2008-2014	
Figure 2-23	2-56
Worldwide Mid Range Content Management License,	
Maintenance, and Services Market Forecasts, Units,	
2008-2014	
Table 2-24	2-57
Worldwide Mid Range Content Management License,	
Maintenance, and Services Market Forecasts Dollars,	
2008-2014	
Figure 2-25	2-59
Worldwide Digital Asset Management Market Shares,	
2007 59	
Table 2-26	2-60
Worldwide Digital Asset Management Market Shares, 2007	
Figure 2-27	2-61
Worldwide Digital Asset Management License,	
Maintenance, and Services Market Forecasts Dollars,	
2008-2014	
Figure 2-28	2-62
Worldwide Digital Asset Management License,	
Maintenance, and Services Market Forecasts Units,	
2008-2014	
Table 2-29	2-63
Worldwide Digital Asset Management License,	
Maintenance, and Services Market Forecasts Dollars,	

2008-2014	
Figure 2-30	2-66
Worldwide Web Content Management License, Maintenance, and Services Market Shares, 2007	
Table 2-31	2-67
Worldwide Web Content Management License, Maintenance, and Services Market Shares, 2007	
Figure 2-32	2-69
Worldwide Web Content Management License, Maintenance, and Services Market Forecasts Dollars, 2008-2014	
Figure 2-33	2-70
Worldwide Web Content Management License, Maintenance, and Services Market Forecasts, Units, 2008-2014	
Table 2-34	2-71
Worldwide Web Content Management License, Maintenance, and Services Market Forecasts Dollars, 2008-2014	
Table 2-35	2-72
Content Management Framework Modules	
Table 2-36	2-74
Web Content Management Driving Forces	
Table 2-37	2-75
Competitive Aspects In The Web Content Management Industry	
Figure 2-38	2-79
Worldwide Computer Output Content Management (COLD)	
License and Maintenance Market Shares, Dollars, 2007	
Table 2-39	2-80
Worldwide Computer Output Content Management (COLD) License And Maintenance Market Shares, Dollars, 2007	
Table 2-40	2-82
Worldwide Computer Output Content Management (COLD) License, Services, And Maintenance Market Forecasts, Dollars, 2008-2014	
Table 2-41	2-84
Worldwide Computer Output Content Management (COLD) License And Maintenance Market Forecasts, Units, 2008-2014	
Table 2-42	2-84
Worldwide Computer Output Content Management (COLD) License And Maintenance Market Shares, Units and Dollars, 2008-2014	
Table 2-43	2-87
Enterprise Content Management Suites Core Components:	
Table 2-44	2-93
Enterprise Content Management Market Aspects	
Table 2-45	2-96
Competitive Factors In Enterprise Content Management	
Figure 2-46	2-100
Regional Enterprise Content Management Markets	
Table 2-47	2-101

Regional Enterprise Content Management Markets

ENTERPRISE CONTENT MANAGEMENT PRODUCT DESCRIPTION

Table 3-1	3-1
IBM/FileNet Content Management Solutions	
Table 3-2	3-2
Features of IBM FileNet Content Manager	
Table 3-3	3-5
Advantages of IBM FileNet Content Manager	
Table 3-4	3-11
Features of IBM Content Manager	
Table 3-5	3-12
Features of IBM Content Manager OnDemand	
Table 3-6	3-13
IBM Content Manager OnDemand Product line	
Table 3-7	3-14
Features of IBM FileNet Image Manager (Active Edition)	
Table 3-8	3-15
Advantages of IBM FileNet Image Manager (Active Edition)	
Table 3-9	3-16
Features of IBM FileNet Content Services	
Table 3-10	3-16
Advantages of IBM FileNet Content Services	
Table 3-11	3-17
Features of IBM FileNet Connectors for SharePoint	
Table 3-12	3-18
Features of IBM Content Management Portfolio	
Table 3-13	3-19
Features of IBM FileNet Content Federation Services	
Table 3-14	3-20
OpenText Content Management Solutions	
Table 3-15	3-22
OpenText Real Estate Industry document Accessibility Challenges	
Table 3-16	3-23
OpenText Management Of Content Across Departments	
Table 3-17	3-27
Benefits of OpenText ECM Content Management	
Table 3-18	3-28
OpenText Business Process Management Products	
Table 3-19	3-29
OpenText Compliance and Governance Products	
Table 3-20	3-32
OpenText Hummingbird Connectivity Products	
Table 3-21	3-33
OpenText Contract Management Products	
Table 3-22	3-34
OpenText Archiving and Imaging Products	
Figure 3-23	3-36

OpenText Artesia Digital Asset Management hub	
Table 3-24	3-37
OpenText Livelink ECM - Document & Collaboration Management Products	
Table 3-25	3-42
OpenText E-Mail Products	
Table 3-26	3-45
OpenText Livelink ECM Extensions for Lotus Notes	
Table 3-27	3-46
OpenText Livelink ECM Extensions for Microsoft	
Table 3-28	3-48
OpenText Extensions for Oracle	
Table 3-29	3-49
OpenText Extensions for SAP Solutions	
Table 3-30	3-52
OpenText Knowledge Management Products	
Table 3-31	3-53
OpenText Project Management Products	
Table 3-32	3-55
OpenText Record Management	
Table 3-33	3-58
OpenText Report and Output Management products	
Table 3-34	3-59
OpenText Transactional Content Management Products	
Table 3-35	3-61
OpenText eDOCS Products	
Table 3-36	3-63
OpenText LegalKEY Products	
Table 3-37	3-64
OpenText Content Services Products	
Table 3-38	3-65
EMC Content Management Solutions	
Table 3-39	3-67
EMC Business Process Management Products	
Table 3-40	3-68
EMC Collaboration and Document Management Products	
Table 3-41	3-71
EMC Compliance Products	
Table 3-42	3-73
EMC Content Security Products	
Table 3-43	3-74
EMC Digital Asset Management Products	
Table 3-44	3-75
EMC Document Capture Captiva Families Products	
Table 3-45	3-76
EMC Document Platform Products	
Table 3-46	3-79
EMC Records Management Products	
Table 3-47	3-80
EMC Report Management Products	
Table 3-48	3-81
EMC SAP Integration Products	

Table 3-49	3-83
EMC Search and Classification Products	
Table 3-50	3-84
EMC Transactional Content Management Products	
Table 3-51	3-86
EMC Web Content Management Products	
Table 3-52	3-87
EMC Archiving Services Benefits	
Table 3-53	3-90
Interwoven Content Management Solutions	
Table 3-54	3-91
List of Interwoven Content Management Solutions	
Table 3-55	3-93
Benefits of Interwoven Teamsite	
Table 3-56	3-95
Interwoven TeamSite Business Users Features	
Table 3-57	3-97
Interwoven Products For Maximizing Online Business Performance	
Table 3-58	3-99
Interwoven Web Content Management (WCM) Core Functions	
Table 3-59	3-102
Interwoven MediaBin Digital Asset Management Positioning	
Table 3-60	3-103
Interwoven Digital Asset Management Solution Functions	
Table 3-61	3-105
Interwoven Improvements To Customer Experience	
Table 3-62	3-107
Interwoven MediaBin Image Transformation Efficiencies	
Table 3-63	3-109
Media Bin Advanced Platform Functions	
Table 3-64	3-111
Interwoven Automation Of The Delivery Of Dynamic Content To Websites	
Table 3-65	3-113
Interwoven LiveSite Dramatically Accelerates Time-To-Market Functions	
Table 3-66	3-115
Interwoven TeamSite Content Management Innovations	
Table 3-67	3-117
Benefits of Interwoven Optimost	
Table 3-68	3-118
Benefits of Interwoven MediaBin	
Table 3-69	3-119
Benefits of Interwoven Targeting	
Table 3-69	3-120
Benefits of Interwoven LiveSite	
Table 3-70	3-121
Benefits of Interwoven Metatagger	
Table 3-71	3-122
Benefits of Interwoven OpenDeploy	
Table 3-72	3-123
Benefits of Interwoven ControlHub Content Management	
Table 3-73	3-124

Benefits of Interwoven Team Portal Table 3-74	3-125
Benefits of Interwoven Worksite Table 3-75	3-126
Benefits of Interwoven Universal Search Figure 3-76	3-127
Interwoven Enconnect DTCC Configurations Figure 3-77	3-128
Interwoven Scrittura Messaging Platform Table 3-78	3-129
Benefits of Interwoven Scrittura Table 3-79	3-130
List of Oracle Content Management Solutions Table 3-80	3-131
Features of Oracle Universal Content Management Table 3-81	3-132
Benefits of Oracle Universal Content Management Table 3-82	3-132
Features of Oracle UCM Web Content Management Table 3-83	3-133
Features of Oracle UCM Document Management Table 3-84	3-134
Benefits of Oracle UCM Document Management Table 3-85	3-135
Benefits of Oracle UCM Digital Asset Management Table 3-86	3-136
Features of Oracle Universal Online Archive Table 3-87	3-137
Benefits of Oracle Universal Online Archive Table 3-88	3-138
Benefits of Oracle Universal Records Management Table 3-89	3-139
Features of Oracle Imaging and Process Management Table 3-90	3-139
benefits of Oracle Imaging and Process Management Table 3-91	3-140
benefits of Oracle Information Rights Management Table 3-92	3-141
Benefits of Oracle Outside In Technology Table 3-93	3-142
Oracle Outside In Technology Product Suite Table 3-94	3-143
Microsoft Enterprise Content Management Features Table 3-95	3-147
Open Text / Microsoft Livelink ECM Integration Functionality For Office SharePoint Server Table 3-96	3-149
Microsoft SharePoint License Positioning Table 3-97	3-151
Microsoft SharePoint ECM Strengths Table 3-98	3-152
Microsoft SharePoint ECM Weaknesses Table 3-98	3-153

Microsoft SharePoint ECM Weaknesses	
Table 3-99	3-154
SDL Tridion	
Table 3-100	3-156
Vignette Content Management Solutions	
Table 3-101	3-159
Vignette Web Content Management Products	
Table 3-102	3-161
Vignette Portals Content Management Products	
Table 3-103	3-162
Vignette Collaboration Content Management Products	
Table 3-104	3-164
Vignette Document and Records Management Products	
Table 3-105	3-166
Vignette Imaging and Workflow Products	
Table 3-106	3-168
Vignette Community Products	
Figure 3-107	3-170
Vignette Enterprise Content Integration Studio	
Figure 3-108	3-171
Vasont Content Management System Multi-Channel Publishing	
Table 3-109	3-172
Vasont Content Management System Products	
Table 3-110	3-174
Vasont Extensions tools	
Table 3-111	3-175
Vasont Feature, Description, Benefit	
Figure 3-112	3-181
Percussion Rhythmyx Content Driven Applications	



REPORT # SH29821665 728 PAGES 251 TABLES AND FIGURES 2008 \$3,300

Table 3-113	3-182
Hyland Software OnBase Enterprise Content Management Modules	
Table 3-114	3-187
Hyland Software OnBase Benefits:	
Table 3-115	3-189
Fatwire Software Content management System	
Table 3-116	3-192
Benefits of Ektron cms400.net Web Content Management	
Table 3-117	3-193
Tibco Content Management Solutions	
Figure 3-118	3-194
Tibco MDM Collaborative Information Manager Components	
Table 3-119	3-195
Features of Tibco MDM Collaborative Information Manager	
Table 3-120	3-196
Features of Tibco PortalBuilder	
Table 3-121	3-199
Adobe Content Management Solutions	
Table 3-122	3-200
Features of Adobe Contribute CS3 Content Management	
Table 3-123	3-204
Alfresco Lifecycle Management Functions	

ENTERPRISE CONTENT MANAGEMENT TECHNOLOGY

Table 4-1	4-4
AJAX Aspects	
Table 4-2	4-7
Collaborative Document Management Functions	
Table 4-3	4-11
Document Management Collaboration Modules	
Table 4-4	4-12
Document Management Collaboration Module Features	
Table 4-5	4-14
Insurance Industry Pages Appropriate For Use By Web Savvy Consumers	
Table 4-6	
Google Use of Ajax Technology	
Table 4-7	4-28
WinterGreen Research Server Energy Costs for 14 Servers with 3 Processors	
Figure 4-8	4-30
Google Dynamic Architecture Source: Sergey Brin and Lawrence Page	
Figure 4-9	4-35
Repository Data Structure	
Figure 4-10	4-36

Architecture.EBay	
Table 4-11	4-40
Microsoft .Net Defines Reusable Modules	
Figure 4-12	4-41
MegaData Center Capital Expenditures	
Figure 4-13	4-43
Microsoft .NET assemblies:	
Figure 4-14	4-45
Microsoft Architecture Dynamic Modular Processing	
Figure 4-15	4-48
Steps To Deploy IBM WebSphere Application Server Using A Virtual Image Template	
Figure 4-16	4-49
WebSphere Application Server Network Deployment Installation And Configuration Steps	
Figure 4-17	4-53
IBM Web Architecture	
Table 4-18	4-54
Facebook Description. 2007 to April 2008	
Table 4-19	4-57
MySpace Metrics	57
Table 4-20	4-59
Reunion Metrics	59
Table 4-21	4-63
Session Initiation Protocol SIP Benefits	
Table 4-22	4-67
avaya.com SIP Protocols	
Table 4-23	4-69
Avaya SIP Creates System Flexibility	
Figure 4-24	4-71
Cisco Unified Communication System	
Table 4-25	4-73
Transitioning From Physical To Virtual Contact Centers	
Figure 4-26	4-80
Fixed Mobile Convergence Handset Illustration	

ENTERPRISE CONTENT MANAGEMENT COMPANY PROFILES

Table 5-1	5-8
Adobe Target Market Strategy	
Table 5-2	5-21
Blue Coat Security Solution –	
Table 5-3	5-39
EMC VMWare Virtual Infrastructure Business	
Revenue Growth Positioning	
Table 5-4	5-51
Hewlett Packard Global Positioning	
Table 5-5	5-58
Hewlett Packard Tower Software Global, Vertical Markets	
Table 5-6	5-59
Hewlett Packard Tower Software Global, Reducing Risk During Litigation	

Table 5-7 Hewlett Packard Tower Software Microsoft Office® Documents	5-60
Table 5-8 Hewlett Packard Tower TRIM Context Features Overview	5-62
Figure 5-9 IBM Revenue and Income	5-67
Table 5-10 Interwoven Engagement/Matter-Centric Collaboration Solution Functions	5-90
Figure 5-11 Selected InterWoven Brands Supported	5-94
Table 5-12 Microsoft Response to Security Vulnerabilities	5-120
Table 5-13 Open Text Content Management Functions	5-130
Table 5-14 Key Factors Distinguishing Open Text Livelink ECM	5-132
Figure 5-15 Selected OpenText LiveLink Partners	5-137
Table 5-16 Selected Open Text Customers	5-139
Figure 5-17 Artesia Partners	5-160
Table 5-18 Terremark's Enterprise Cloud Functions	5-179
Table 5-19 Hyland Software OnBase Workflow Core Features	5-187
Table 5-20 YASH Comprehensive Service Approach Holistic View	5-194
Table 5-21 Yosh Business Process, Business Environment Initiatives	5-197

ABOUT THE COMPANY

WINTERGREEN RESEARCH, IS AN INDEPENDENT RESEARCH COMPANY FOCUSING ON DETERMINATION OF MARKET SHARES AND MARKET FORECASTS OF SEGMENTS WORLDWIDE. THE COMPANY IS FUNDED BY THE DIRECT SALE OF STUDIES AND THROUGH A WORLDWIDE NETWORK OF DISTRIBUTORS THAT INCLUDES THOMPSON FINANCIAL, GLOBAL INFORMATION, MARKET RESEARCH.COM, AND RESEARCH AND MARKETS.COM. THE COMPANY HAS A RETURN ON INVESTMENT ANALYSIS TOOL BASED ON MODELS THAT REFLECT THE FEATURES AND BENEFITS OF A PARTICULAR PRODUCT OR SERVICES SET.

BUSINESS ROI MODELS ARE EVOLVED FOR A PARTICULAR PRODUCT SET. THESE WILL ARTICULATE THE COMPETITIVE MESSAGE IN ROI TERMS FOR THE PARTICULAR PRODUCT SETS AND SHOW THE FUNCTIONAL

REPORT # SH29821665 728 PAGES 251 TABLES AND FIGURES 2008 \$3,300

AND TCO ADVANTAGE OF PRODUCTS VS. COMPETITORS. THE MODELS ARE VERY USEFUL FOR COMMUNICATING THE PARTNER MESSAGE.

A COMBINED SOFTWARE AND PARTNER SOFTWARE AND SERVICES SOLUTION CAN BE ARTICULATED AS A MARKETING MESSAGE IN THE MODELS. THE MODELS ARE A VERY SIGNIFICANT ASPECT OF THE OVERALL PARTNER PRESENTATION, PROVIDING THE CAPABILITY OF USING THE MODELS IN COMBINATION WITH A POWER POINT MARKETING MESSAGE TO BE USED FOR CLOSING THE SALE.

PARTNERS CAN USE A POWER POINT THAT REFERENCES THE ONLINE ROI TOOL SO THAT CUSTOMERS GET THE MARKETING MESSAGE IN A CLEAR AND CRISP MANNER ABLE TO BE PRESENTED WITHIN 10 MINUTES, AND YET HAVE THE GRANULARITY OF THE ROI TOOL SO THAT A POTENTIAL CUSTOMER CAN DIG INTO THE ROI NUMBERS IF THEY WISH BY BUYING A USER NAME FROM WINTERGREEN RESEARCH AND GOING TO THE WGR SITE TO GET THE NUMBERS INDEPENDENTLY OF IBM.

THE ROI MODELS ARE GOOD AS A BASIS FOR THE POWER POINT PRESENTATION AND SO ALSO, IT IS GOOD THAT THE NUMBERS EXIST AND COME FROM A CREDIBLE INDEPENDENT SOURCE.

WINTERGREEN RESEARCH, FOUNDED IN 1985, PROVIDES STRATEGIC MARKET ASSESSMENTS IN TELECOMMUNICATIONS, COMMUNICATIONS EQUIPMENT, HEALTH CARE, INTERNET AND ADVANCED COMPUTER TECHNOLOGY. INDUSTRY REPORTS FOCUS ON OPPORTUNITIES THAT EXPAND EXISTING MARKETS OR DEVELOP MAJOR NEW MARKETS. THE REPORTS ASSESS NEW PRODUCT AND SERVICE POSITIONING STRATEGIES, NEW AND EVOLVING TECHNOLOGIES, AND TECHNOLOGICAL IMPACT ON PRODUCTS, SERVICES, AND MARKETS. MARKET SHARES ARE PROVIDED. LEADING MARKET PARTICIPANTS ARE PROFILED, AND THEIR MARKETING STRATEGIES, ACQUISITIONS, AND STRATEGIC ALLIANCES ARE DISCUSSED. THE PRINCIPALS OF WINTERGREEN RESEARCH HAVE BEEN INVOLVED IN ANALYSIS AND FORECASTING OF INTERNATIONAL BUSINESS OPPORTUNITIES IN TELECOMMUNICATIONS AND ADVANCED COMPUTER TECHNOLOGY MARKETS FOR OVER 30 YEARS.

ABOUT THE PRINCIPAL AUTHORS

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