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# The Forrester Wave™: Enterprise Content Management Suites, Q4 2009

by Stephen Powers, Brian W. Hill, and Craig Le Clair  
for Information & Knowledge Management Professionals

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Traditional Players Continue To Lead, While Microsoft Makes Inroads

by **Stephen Powers, Brian W. Hill, and Craig Le Clair**

with Matthew Brown and Peter Schmidt

## EXECUTIVE SUMMARY

In Forrester's 70-criteria evaluation of eight enterprise content management (ECM) suite vendors, we found that IBM, Oracle, EMC, and Open Text lead due to breadth and depth of functionality and a continued focus on end-to-end ECM needs. Strong Performer Microsoft lacks depth in certain areas of ECM, with a focus on business content rather than transactional or persuasive, but its lighter footprint and collaboration functionality continue to give it market momentum. Other Strong Performers include Hyland Software — traditionally focused on imaging and archiving but expanding into records management and workflow — and HP, which has leveraged its 2008 TOWER Software acquisition and offers document management, imaging, and records. Finally, Contender Alfresco Software, with an open source offering, lacks overall ECM suite breadth, but it's gained traction with enterprises looking for an ECM alternative with a lower-cost entry point.

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## NOTES & RESOURCES

Forrester conducted evaluations in July 2009 and spoke with 27 vendor and user companies.

### Related Research Documents

- "The Forrester Wave™: Collaboration Platforms, Q3 2009"  
August 6, 2009
- "The Forrester Wave™: Document Output For Customer Communications Management, Q2 2009"  
June 25, 2009
- "The Forrester Wave™: Records Management, Q2 2009"  
June 23, 2009
- "The Forrester Wave™: Web Content Management For External Sites, Q2 2009"  
June 1, 2009
- "The Forrester Wave™: Message Archiving Software, Q1 2008"  
February 14, 2008

## TODAY'S ECM MARKET: BROAD, DIVERSE, AND A PRIORITY FOR ENTERPRISES

Organizations continue to show strong interest in enterprise content management (ECM) due to the continuing explosion of unstructured information, such as documents, scanned images, rich media, Web content, corporate records, emails, and other content. Investment in ECM remains a priority for I&KM decision-makers, with 25% interested in/considering, 10% piloting, and 23% expanding or upgrading existing ECM solutions in 2009.<sup>1</sup> Through inquiry and interviews with ECM customers, Forrester has found that ECM decision-makers:

- **Long for leaner, more agile solutions.** Long, costly implementations with a heavy IT footprint have been a hallmark of ECM. But buyers, tired of ECM shelfware, want to cut implementation times with industry- and application-specific building blocks and easier approaches to build contextual applications on top of their ECM systems.
- **Get frustrated with gaps in solution delivery.** ECM technologies can yield major benefits, but without sufficient focus on discipline and process, many enterprises struggle with implementations. Vendor products alone won't solve enterprise challenges or translate to ROI gains. Effective change management and appropriate focus on supporting information architecture has lasting consequences for the end user experience, scalability, mitigating legal risk, and deployment success. Early engagement with internal process experts and enterprise end users along with training and other service aspects plays a vital role.<sup>2</sup>
- **Increasingly want to integrate SharePoint with other systems.** ECM adoption has always been an issue for organizations, in part due to information workers' reluctance to change work habits and use unfamiliar user interfaces to manage content. However, SharePoint's viral adoption in some organizations has presented these firms with the opportunity to better manage content residing in other repositories by using SharePoint as a front end for content management, then offloading it to other systems at appropriate places in the workflow.
- **Show more interest in collaboration functionality.** Collaborative functionality and ECM increasingly go hand in hand. Enterprises express the need for managing content for team workspaces and more social-media-type functionality such as wikis and tag clouds.
- **Need more transparency in the content contribution process.** The concept of "transparent" ECM rings true for any organization whose information workers have resisted the extra steps of uploading (and downloading) content to repositories, or who have to explicitly designate content as a record. Information workers would prefer to work in the tools where they are most comfortable and to have content automatically imported into repositories where it is appropriately classified.

## A WIDE ARRAY OF PLAYERS POPULATE THE ECM MARKET

The ECM market partly consists of well-known vendors that offer full-fledged end-to-end ECM suites. However, the perception that every piece of functionality within these suites is relevant for all enterprises, or that every module must come from a single vendor, is not in line with reality. A number of smaller — but growing — vendors don't compete with the larger players on all the ECM capabilities but still provide strong value to customers in certain areas. The relevant players in the market fall into these categories (see Figure 1):

- **Traditional ECM suites.** Vendors such as EMC, IBM, Open Text, and Oracle provide end-to-end ECM offerings that manage all three categories of enterprise content: business, transactional, and persuasive.<sup>3</sup> These vendors provide breadth and depth for a wide array of content, including documents, scanned images, rich media, Web content, corporate records, and email. These packages generally have a large IT footprint and significant implementation times but offer the benefit of a single package with which to manage content and mitigate content-related risks. Further, they offer a single platform around which to build IT skills.
- **Process-focused.** Imaging suppliers Hyland Software, Laserfiche, Objective, and Perceptive Software provide packaged and easy-to-install solutions that support document-centric business processes such as invoice processing, customer onboarding, medical records, accounts payable, contract management, and human resources.<sup>4</sup> Hyland has ECM breadth but focuses on key business processes including the very hot medical records area. In addition, Hyland recently acquired Valco Data Systems, whose software works with MEDITECH's EMR offering. Perceptive may have the fastest-growing ECM business in the industry, with a strong focus on unifying and processing documents (via scanning, printing, importing, and email) and bringing them under content management. Australia-based Objective takes a vertical-market focus in the public sector in Asia/Pacific and Europe.
- **Reduced footprint.** Some ECM buyers, disillusioned with the heavy footprint and long implementation times of traditional ECM products, look for lighter, lower-cost solutions. Microsoft has seen a great deal of success by positioning Office SharePoint Server 2007 as "ECM for the masses." While it doesn't have the depth of capabilities of a traditional ECM suite, it does offer a breadth of functionality for business and persuasive content. Meanwhile, open source vendors like Alfresco Software and Nuxeo offer a lower-cost entry point with a focus on business content. SpringCM, the best-known SaaS ECM provider, supports business and transactional content, with a core value based on price and reduced implementation time.<sup>5</sup>
- **Archiving and infrastructure.** Both IT and the business find great comfort with scalable, reliable central repositories, which partially explains the continued presence of several solutions that have fallen behind the latest ECM features. Mobius Management Systems, a traditional leader in the COLD market, has released improved records management (RM), workflow, and integration capabilities in 2009, and its offerings can leverage Allen Systems Group system management

tools. IBM Content Manager is still a strong offering, and while IBM FileNet’s business process management (BPM) and records management — evaluated in this Forrester Wave — are clearly the future, Content Manager continues to serve customers with highly scalable repository services. EMC also plays in this segment of the market. SAP, the premier packaged applications provider, delivers content management as part of its offering through the NetWeaver integration platform. Yet SAP is content to leave the heavy lifting to others, depending on a strong partner ecosystem — including EMC and Open Text — to extend ECM capabilities.

- **SMB.** Midmarket providers like Laserfiche, Xerox, and Xythos Software continue to do solid business by focusing on manual, paper-based processes. And why not? There are still millions of file cabinets in the world. Forrester estimates that there are more than 30 providers of content management systems for departmental solutions, but a few standouts seem to fit particularly well. Laserfiche — which lists an impressive 26,000 customers — continues to grow its business each year. Growing closer to rounding out a full ECM suite, Laserfiche now supports SharePoint-based workflows, a records management module, and scalability improvements. Xythos, a Java-based alternative to SharePoint that has found traction in the public and higher-education sectors, provides both on-premise and SaaS basic content management offerings.<sup>6</sup> Xerox DocuShare CPX — now part of Xerox’s services arm — is growing rapidly and adding capability for document processing services, as well as solutions for eDiscovery and mortgage loan origination.<sup>7</sup>
- **European.** Mostly North American players have dominated ECM market since the early 1990s, yet there are several strong providers outside North America that have been in the market for years. These include EVER TEAM — a vendor traditionally strong in France, Spain, and the Middle East — which has recently expanded internationally by engaging more with SIs. It recently released a metadata-based document object model and a protocol handler for SharePoint Enterprise Search 2008 to improve search for composite documents — key functionality for case management. And Berlin-based SAPERION has a full ECM suite that includes archiving, document management, capture, COLD, e-signature, email, and records management.

**Figure 1** Prominent Players In The ECM Market

ECM category	Prominent vendors
Traditional ECM suites	EMC, IBM, Open Text, Oracle
Process-focused	Hyland Software, Laserfiche, Objective, Perceptive Software
Reduced footprint	Alfresco Software, Microsoft, Nuxeo, SpringCM
Archiving and infrastructure	EMC, IBM, Mobius Management Systems, SAP
SMB	Laserfiche, Xerox, Xythos Software
European	EVER TEAM, SAPERION

## ECM SUITES EVALUATION OVERVIEW

To assess the state of the ECM suites market and to see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of top ECM suites vendors.

### Evaluation Criteria: Current Offering, Strategy, And Market Presence

After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria. We evaluated vendors against approximately 70 criteria, which we grouped into three high-level buckets:

- **Current offering.** We focused on ECM tool breadth and extended capabilities for putting content to work in business processes, employee collaboration, and customer experiences.
- **Strategy.** ECM suite vendors need strong strategies supporting an enterprise's broader information management needs and must have broad ecosystems of systems integrators and ISVs to help ease implementations. We investigated vendors' product road maps, corporate strategy, and partnership activity.
- **Market presence.** We evaluated vendors' current installed bases and the size of the ECM product revenue. We also looked at each vendor's overall revenue and geographic presence.

### Vendors Selected For ECM Breadth, Leadership, And Enterprise Interest

Forrester included eight vendors in the assessment: Alfresco Software, EMC, Hyland Software, HP, IBM, Microsoft, Open Text, and Oracle. Each of these vendors has a combination of any two of the following (see Figure 2):

- **Core ECM functionality breadth.** The suite offers most or all of the following: document management (DM), document imaging, records management (RM), Web content management (WCM), digital asset management (DAM), and document output management (DOM).
- **Leadership in information management.** The vendor is a leading provider of information management technology including RDBMS, business intelligence (BI), portal, and collaboration, and it has a road map — that has been shared with Forrester — addressing investments in core ECM functionality.
- **Enterprise interest.** Finally, we selected vendors that were frequently mentioned or inquired about by enterprises in the context of ECM.

**Figure 2** Evaluated Vendors: Product Information And Selection Criteria

Vendor	Product evaluated	Product version evaluated	Version release date
Alfresco Software	Alfresco Enterprise Edition	V3.1	March 2009
EMC	Documentum ECM	D6.5 SP1	December 2008
HP	HP TRIM software	6R2	December 2008
Hyland Software	OnBase	9.0	Summer 2009
IBM	FileNet Content Manager	4.5	Q4 2008
Microsoft	Microsoft Office SharePoint Server 2007	3	November 2006
Open Text	Open Text ECM Suite	*	*
Oracle	Oracle Universal Content Management	10gR3	January 2009

\*Multiple components with different product version numbers and release dates

**Vendor selection criteria**

Vendor's ECM suite offers most or all of the following: document management, document imaging, records management, Web content management, digital asset management, and document output management.
Vendor is a leading provider of information management technology including RDBMS, business intelligence, portal, and collaboration, and has a road map addressing investments in core ECM functionality.
Vendor is frequently mentioned or inquired about by enterprises in the context of ECM.

Source: Forrester Research, Inc.

**THE FOUR HORSEMEN OF ECM RIDE AGAIN, BUT COMPETITORS REMAIN RELEVANT**

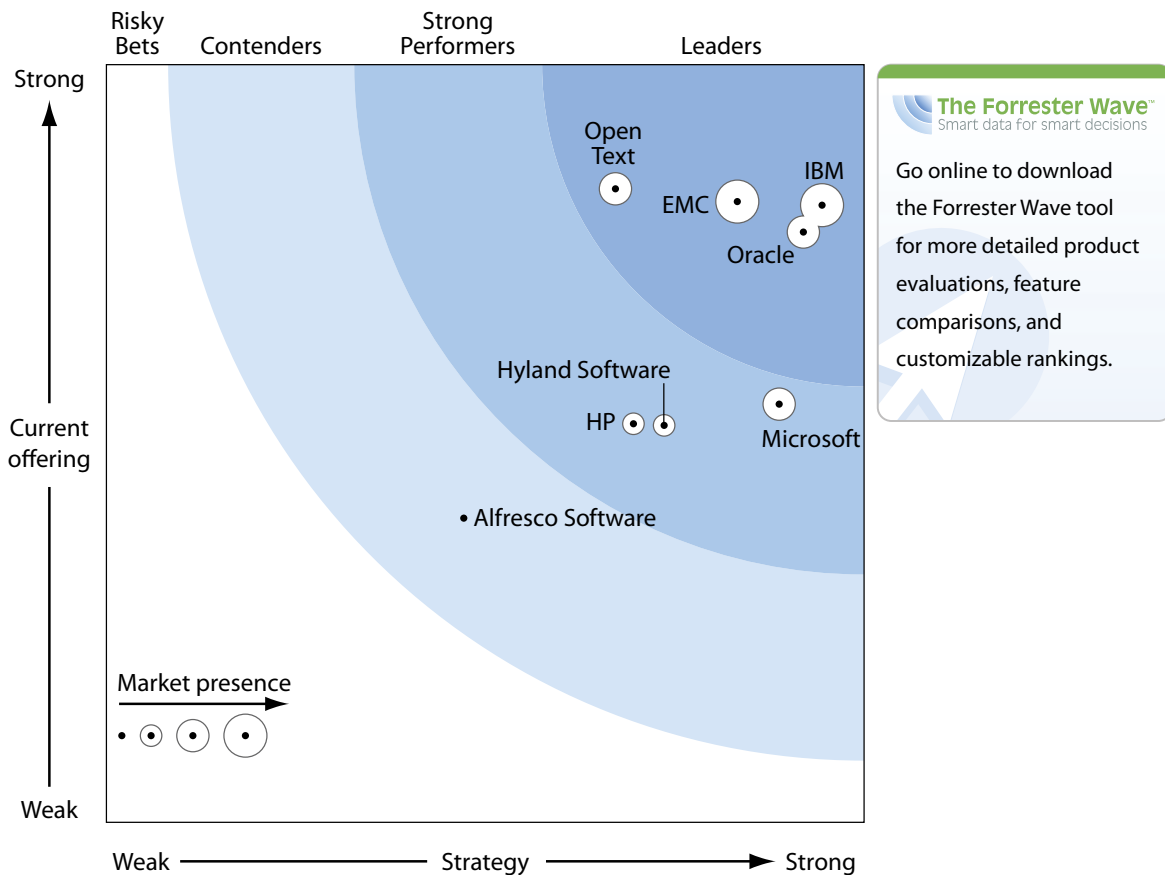
Forrester's assessment below represents a summary of the results of this analysis. We encourage readers to consult the Forrester Wave spreadsheet model linked to this report for a detailed understanding of the criteria, weightings, and specific scores. The overall ECM evaluation uncovered a market in which (see Figure 3):

- **EMC, IBM, Oracle, and Open Text lead with breadth and depth.** The four Leaders not only have breadth in ECM, they also offer a wide range of tools that enable I&KM pros to manage, secure, and retain content. Their offerings include a mix of data management, business intelligence, content integration support, and content-centric application support. All four offer the promise of end-to-end ECM functionality from a single vendor.
- **Microsoft makes inroads and gains momentum but has several functionality holes.** Microsoft has relevant ECM support, but it lacks the depth and breadth of the four Leaders.

However, its extensive collaboration footprint, growing number of technical resources, and viral spread throughout many enterprises via departmental initiatives help keep it relevant when companies evaluate their overall ECM strategies.<sup>8</sup>

- **Hyland and HP provide competitive offerings for business and transactional content.** Hyland and HP offer competitive alternatives to both EMC and IBM for I&KM pros that want document management, imaging and capture, and records management. However, both lack strong support for persuasive content in areas such as Web content management, document output management, and digital asset management.
- **Open-source-based Alfresco challenges the proprietary players.** Alfresco has traditionally focused more on document management, imaging, and WCM rather than full ECM suite capabilities. However, its ability to provide a low-cost alternative to the larger vendors — as well as a recent investment in records management functionality — makes it relevant for some enterprises.

**Figure 3** The Forrester Wave™: ECM Suites, Q4 '09



Source: Forrester Research, Inc.

**Figure 3** The Forrester Wave™: ECM Suites, Q4 '09 (Cont.)

	Forrester's Weighting	Alfresco Software	EMC	HP	Hyland Software	IBM	Microsoft	Open Text	Oracle
<b>CURRENT OFFERING</b>	0%	2.01	4.10	2.63	2.62	4.07	2.76	4.18	3.90
Core ECM capability breadth	0%	2.20	4.50	2.75	2.60	4.30	1.80	4.85	4.15
ECM suite integration	0%	2.60	3.90	2.30	2.90	4.00	4.10	4.40	4.70
Content integration and archiving	0%	0.20	3.80	3.40	3.00	4.40	2.40	4.60	3.40
Additional ECM capabilities	0%	2.40	3.80	2.60	2.30	3.20	2.40	2.70	2.60
Extended capabilities	0%	1.90	3.90	1.40	1.25	3.65	3.80	3.20	3.90
Core capability architecture	0%	4.75	5.00	2.75	3.75	5.00	3.50	4.00	5.00
<b>STRATEGY</b>	0%	2.36	4.16	3.48	3.68	4.72	4.44	3.36	4.60
Product strategy	0%	2.60	3.80	3.00	3.80	4.60	4.20	3.00	4.60
Whole solution strategy	0%	1.80	5.00	4.60	3.40	5.00	5.00	4.20	4.60
Licensing and pricing	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<b>MARKET PRESENCE</b>	0%	1.40	4.71	2.30	2.25	5.00	3.95	3.81	3.24
Company financials	0%	0.00	4.60	1.60	0.40	5.00	4.00	2.80	2.20
Training	0%	1.00	5.00	3.00	5.00	5.00	3.00	5.00	5.00
ECM customer base	0%	3.00	4.80	3.00	4.00	5.00	4.00	4.80	4.20
Geographic presence	0%	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

### Leaders: IBM, Oracle, EMC, And Open Text

- IBM.** IBM's FileNet P8 product provides a wide array of functionality with comprehensive document imaging, document management, records management, and business process management support. But it's the completeness of the full product line that will serve IBM customers well in the long term. Complementary offerings include IBM's Lotus Forms, Content Manager OnDemand (for enterprise report management), integration-centric BPM, and the full collaboration suite of products. Ultimately, IBM's substantial information management portfolio — the broadest in the industry — just adds to its clout as an ECM Leader.
- Oracle.** Leveraging its 2007 acquisition of Stellent, Oracle provides an extensive, robust ECM suite. With strengths in document management, records management, and Web content management, Universal Content Management (UCM) delivers a broad range of ECM capabilities and strong integration support for other repositories and applications via Web

services, federation, and direct interfaces. Although Oracle relies on partners for key archiving and eDiscovery applications and only provides limited hosting support, the vendor's extensive ECM functionality and integration across its suite make it a compelling option for many enterprises, especially those seeking to leverage investments in other Oracle applications.

- **EMC.** EMC continues to build on its ECM suite leadership, with a broad range of capabilities and strengths in document management, document imaging and capture, and records management. The vendor continues to make significant advances with focus on development and deployment acceleration, integration enhancements to third-party applications, and UI improvements. However, EMC does not have the same level of WCM capabilities as fellow Leaders Open Text and Oracle. It also currently has limitations with eDiscovery capabilities, but a successful integration of recent acquisition Kazeon Systems holds potential to significantly bolster the vendor's legal risk mitigation portfolio.<sup>9</sup>
- **Open Text.** Open Text, the only proprietary pure-play ECM player in this evaluation, continues to offer strong document management, document imaging, digital asset management, and records management technology. With the technology from recent acquisition Vignette, it now has the strongest Web content management offering of the ECM vendors. Open Text has strong partnerships with Microsoft and SAP and continues to focus on content-centric applications — such as contract management, case management, and litigation management — that offer clients the opportunity to put content to use and support human-centric processes, collaboration, and decision-making. Open Text lacks strong document output and assembly capabilities, and its biggest challenge will be to continue to integrate all its acquisitions within its ECM umbrella, including the Vignette products.

### Strong Performers: Microsoft, Hyland Software, And HP

- **Microsoft.** To address collaboration and content management needs, enterprises continue to adopt Microsoft Office SharePoint Server 2007 at a rapid clip. Tight integration with Microsoft Office desktop applications, strong collaboration capabilities, and dedicated efforts to cost-effectively expand the customer base beyond traditional ECM users play prime roles in SharePoint's ongoing market momentum. Despite the vendor's success in bringing content management to the masses, Microsoft's current offering has limitations in imaging, archiving, records management, BPM, and eDiscovery. In its forthcoming release, Microsoft will likely address some of these shortcomings, but it's clear that partner integrations will remain important in meeting these and other traditional ECM requirements.
- **Hyland Software.** Hyland's ECM suite targets extensive document imaging and content archiving needs, increasingly on an industry-specific or process-domain-specific basis. Hyland continues to add to core ECM tools — such as improved records management and BPM functionality — to address the needs of healthcare, public sector, financial services, manufacturing, insurance, and education markets. Hyland doesn't offer Web content management and digital asset management,

choosing not to pursue the persuasive segment of the ECM market. Hyland also focuses on integration with Microsoft SharePoint rather than native functionality for collaboration. But its new functionality, strong Microsoft partnership, and loyal distribution network should result in continuing strong growth in both customers and revenue.

- **HP.** Leveraging its 2008 acquisition of TOWER Software, HP provides solid capabilities for document management, imaging and capture, and records management. Limitations in HP TRIM's ECM portfolio include Web content management, digital asset management, CMIS, collaboration, eDiscovery, and internationalization. Despite these shortcomings, with HP TRIM, HP delivers a solid set of content management functionality with simplified deployment capabilities and holds strong potential, especially as the vendor continues to align its portfolio of archiving, storage, and services assets.

#### Contender: Alfresco Software

- **Alfresco Software.** Open source vendor Alfresco has been able to capture the attention of enterprises seeking an ECM suite alternative with a lower-cost and smaller footprint. Alfresco has strength in core document management and content services, provides a unified repository, and — as an open source product — excels in extensibility. Alfresco has also significantly invested in records management — historically a weakness — with new functionality set to be released in Q4 2009. However, Alfresco still lacks deep persuasive content support, with limited WCM and document output/assembly capabilities. It also lacks depth in content archiving and BPM support. These holes in its ECM suite offering will likely limit its true enterprise installations. Still, I&KM pros must consider Alfresco as a serious alternative as the vendor continues to build momentum with IT pros and implementation partners.

## SUPPLEMENTAL MATERIAL

### Online Resource

The online version of Figure 3 is an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings.

### Data Sources Used In This Forrester Wave

Forrester used a combination of two data sources to assess the strengths and weaknesses of each solution:

- **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 demos.** We asked vendors to conduct demonstrations of their product's functionality. We used findings from these product demos 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.

### The Forrester Wave 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 then narrow our final list. We choose 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 lab evaluations, 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 the Forrester Wave 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 weightings 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

- <sup>1</sup> Base: 1,015 information and knowledge management decision-makers. Source: Enterprise And SMB Software Survey, North America And Europe, Q4 2008.  
  
Forrester's 2008 software study was fielded to 2,227 IT executives and technology decision-makers located in Canada, France, Germany, the UK, and the US from companies with two or more employees. This survey is part of Forrester's suite of Business Data Services studies. Forrester fielded the survey from December 2008 to February 2009.
- <sup>2</sup> Insufficient attention to people and processes deployment elements stands out as a big element impacting solution satisfaction. For example, less than half of records management decision-makers report satisfaction with their deployments and many cite change management shortfalls as a key frustrating factor. For additional details on satisfaction and other records management survey results, see the September 3, 2009, "[Records Management: User Expectations, Market Trends, And Obstacles](#)" report.
- <sup>3</sup> I&KM pros should consider content use when developing an ECM strategy and evaluating vendors by looking at content from three perspectives: transactional content, business content, and persuasive content. See the December 21, 2005, "[Transactional, Business, And Persuasive Content: A Better Way To Look At Enterprise Content](#)" report.
- <sup>4</sup> These providers were evaluated against six process areas including account opening, contract management, invoice processing, medical records, and student records. For this review please see the October 20, 2008, "[Use ECM To Fire Up Business Processes](#)" report.
- <sup>5</sup> Forrester developed a "SaaS-ability" model indicating how well SaaS delivery works for a content, collaboration, and data software, and which ones will likely be adopted. See the July 8, 2009, "[How SaaS-Able Are Content, Collaboration, And Data Software Categories?](#)" report.
- <sup>6</sup> SaaS for content services is a growing force in the market, with companies like SpringCM, Xyθος, and Hyland provide ECM services as a SaaS offering. See the July 8, 2009, "[How SaaS-Able Are Content, Collaboration, And Data Software Categories?](#)" report.
- <sup>7</sup> XGS has a full range of document processing services that include capture, output, and managed print services. See the April 29, 2008, "[Market Overview: Document Processing Services](#)" report.
- <sup>8</sup> Findings from Forrester's Enterprise And SMB Software Survey, North America And Europe, Q4 2008 show that 52% of respondents expect to purchase content management software from Microsoft in 2009. For additional data from the survey, see the June 22, 2009, "[Microsoft Leads A Fragmented, Growing Content Management Market](#)" report.
- <sup>9</sup> In announcing its intention to purchase Kazeon, EMC will pick up significant eDiscovery assets, but it needs to focus on alignment with its current legal risk mitigation portfolio. Source: Brian W. Hill, "EMC To Acquire Kazeon", *The Forrester Blog For Information & Knowledge Management Professionals*, September 3, 2009. ([http://blogs.forrester.com/information\\_management/2009/09/emc-to-acquire-kazeon.html](http://blogs.forrester.com/information_management/2009/09/emc-to-acquire-kazeon.html)).

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