Ovum Decision Matrix: Selecting an Enterprise Content Management Solution for the Cloud, 2017–18
Summary

Catalyst

Content is at the center of digital transformation, and this is driving an evolution in enterprise content management (ECM) as vendors adapt their products to help enterprises better manage their content and use it to gain valuable insights. Enterprises need to change the way in which they procure and consume ECM to take advantage of this evolution. In the last ECM, Ovum Decision Matrix, Selecting an Enterprise Content Management Solution, 2015–16, we spoke about how the large ECM suites were beginning to be broken down into solutions that target specific areas of functionality. This solutions-based approach to ECM is continuing, and an important element of this is the cloud, which is allowing ECM to become a services-oriented technology where enterprises can use cloud-based content services to add extra capabilities to existing ECM investments. Most ECM vendors now offer complete cloud-based ECM solutions, enabling enterprises to move the management of content to the cloud. Enterprises should consider the cloud as an alternative to on-premises ECM. Even if there are no immediate plans to migrate, the next iteration of ECM should result in a platform that can be easily migrated to the cloud.

Ovum view

An important element of digital transformation is managing the lifecycle of content. Enterprises should at the very least consider whether implementing ECM in the cloud is a viable option. Cloud is an important element of digital transformation, and it addresses two major requirements of enterprises: the need for cost-effective ECM solutions, and ensuring content is secure. ECM platforms have become complex and expensive to implement. Eliminating the need for hardware and infrastructure, ECM in the cloud removes much of the complexity of the implementation process as well as reducing the cost. Deploying ECM as a service also makes it easier to deploy only the capabilities required, and not features that will never be used, which often happens with on-premises systems. Security concerns within enterprises have acted as a prohibitor to cloud, and ECM vendors still have a way to go to convince all enterprises that the cloud is secure. Large ECM vendors usually provide their own cloud data centers, while smaller vendors use third-party cloud providers such as Amazon, Google, or Microsoft. All cloud service providers take security extremely seriously and take measures to ensure that their cloud environments are more secure than on-premises data centers. Measures to secure data centers and the data stored within them applied at the physical, operational, and storage levels include preventing unauthorized access, screening potential employees, DoS protection, and encrypting all stored content.

For this Ovum Decision Matrix, ECM is defined as document management and collaboration, records management, capture and scanning, business process management (BPM), and search supported by information rights management, and content analytics. Most of these technologies are included in the platforms, although capture and scanning is sometimes treated as an add-on. Some ECM vendors are starting to provide microservices that sit on top of the platform, while others have this on their roadmaps. Microservices targeted at addressing both vertical industries and horizontal tasks are designed to be deployed alongside cloud or on-premises ECM platforms. The main advantage of this approach is that microservices can be used with third-party ECM platform products, which means that existing investments do not have to be replaced. An important element that should be taken into
consideration when selecting an ECM system is the ability to integrate with third-party applications regardless of whether they are on-premises or cloud-based. Some vendors include native connectors to widely deployed enterprise resource planning (ERP) and customer relationship management (CRM) systems, and most vendors provide application programming interfaces (APIs) and support for content management interoperability services (CMIS) to allow integrations with third-party ECM systems and enable other applications to be easily built.

Enterprises need to manage content efficiently. They need the ability to collaborate on documents both internally and with third parties. This has resulted in many ECM vendors incorporating enterprise file sync and share (EFSS) capabilities into their platforms. At the same time, many EFSS vendors are providing lightweight document management facilities, and some are beginning to refer to themselves as ECM vendors. We are beginning to see a convergence in technology, although the ECM vendors are too far ahead in terms of capabilities for this convergence to be reminiscent of the convergence seen at the beginning of the century when document management vendors developed or acquired web content management (WCM) capabilities and WCM vendors gained document management facilities to create ECM vendors. Partnerships between ECM and EFSS vendors could result in acquisitions as ECM vendors look to strengthen their capabilities in this area.

Microsoft SharePoint continues to dominate the market, although not all customers that have deployed SharePoint will have done so for its ECM capabilities. We are continuing to see consolidation in the ECM space. The acquisition by OpenText of Dell EMC Enterprise Content Division (ECD), which includes Documentum, is now complete, resulting in OpenText having two entries in this Ovum Decision Matrix. Kofax, which includes the Perceptive ECM suite, has been spun off from Lexmark and is now a private company. At the time of writing, it has been announced that Hyland Software has acquired the Perceptive portfolio.

### Table 1: Advantages of the cloud

<table>
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<tr>
<th>Advantage</th>
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<tbody>
<tr>
<td>No large capital investment on hardware</td>
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<tr>
<td>More secure than on-premises software</td>
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<tr>
<td>More cost-effective than on-premises software</td>
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<tr>
<td>Backups and disaster recovery provision provided</td>
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<tr>
<td>Quicker implementation</td>
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<tr>
<td>No updates to install</td>
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<tr>
<td>Automatically scales up and down as requirements change</td>
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<tr>
<td>Easier to access content from any location</td>
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Source: Ovum
Key findings

- Enterprises should consider the cloud capabilities of ECM vendors when looking to implement their next iteration of ECM. Implemented appropriately, cloud is more secure than on-premises and is more cost-effective.

- ECM vendors are closely matched in terms of core features and functions. For differentiation look at the cloud capabilities of ECM vendors, including native integrations provided with both third-party on-premises and cloud-based applications.

- Integration with ERP, CRM, HR, and third-party ECM repositories is an important element of cloud-based ECM. Ensure that native connectors are provided for common applications and that there are APIs and support for CMIS available, as well as mechanisms for easily building custom integrations.

- ECM vendors are adopting microservices as a way of delivering granular, task-based applications that provide small pieces of functionality. When procuring an ECM system, look for vendors that are creating large numbers of microservices.

- The ECM vendor landscape is continuing to consolidate as shown by the acquisition of Dell EMC’s Enterprise Content Division by OpenText and the announcement that Hyland was acquiring the Perceptive portfolio from Kofax.

- Microsoft SharePoint, the two OpenText products (Content Suite and Documentum), IBM ECM Cloud Portfolio, OnBase by Hyland, and Oracle WebCenter Content are all in the leader category.

- Kofax ECM portfolio and the two open source products, Alfresco Content Services and Nuxeo Platform are challengers in this Ovum Decision Matrix.

- There are no market followers in this Ovum Decision Matrix. ECM is mature, which means that all vendors score highly in terms of technology. However, products from the smaller vendors have generally been available as cloud solutions for longer than those from the large vendors.

Vendor solution selection

Inclusion criteria

Given the broad definitions of ECM and the consequent very wide range of products and vendors that are positioned in this technology area, identifying those which would be appropriate for the largest number of Ovum’s enterprise subscribers resulted in a very tight set of criteria.

- The vendors had to offer a "platform" for ECM, where all functionality could be accessed and managed through a single interface.

- Each ECM platform had to be able to be deployed in the cloud.

- The products had to have a significant level of recognition among enterprises, cover a range of verticals, and have a presence in multiple geographies.
The products needed to include a number of technologies in their portfolios, comprising document management and collaboration, records management, workflow/BPM, capture and scanning capabilities, and search.

Exclusion criteria

Vendors and products excluded from analysis in this report include:

- those providing point solutions such as enterprise file sync and share or records management.
- offerings with a significant portion of functionality that is delivered through third-party products.
- vendors whose presence is limited to a restricted geographical area.

Methodology

Technology/service assessment

In this technology/service assessment dimension, Ovum analysts have developed a series of features and functionality that would provide differentiation between the leading solutions in the marketplace. The criteria groups identified for ECM in the cloud are as follows:

- **Document management and collaboration**: The ability to create and edit content in a collaborative environment, where collaboration capabilities include file sync and share.
- **Information rights management**: Protecting individual items of content by controlling what actions can be taken on them.
- **Records management**: The ability to control content from its creation to disposition, with processes to ensure that content can be retained in an immutable form when needed.
- **Content/text analytics**: Tools that analyze how content is being used and who is using it, which is useful in assessing whether content has value to the organization.
- **Business process management**: The ability to create content-centric processes that are often triggered by the receipt of an item of content.
- **Capture and scanning**: The ability to import information from physical media in a form that can be managed by the rest of the products in the platform.
- **Search**: The ability to locate content across the enterprise on local drives, desktops, and a wide range of repositories.

Execution

In this dimension, Ovum analysts review the capability of the solution around the following key areas:

- Maturity: The stage that the product/service is currently at in the maturity lifecycle is assessed here, relating to the maturity of the overall technology/service area.
- Interoperability: In this element we assess how easily the solution/service can be integrated into the organization's operations, relative to the demand for integration for the project.
- Deployment: Referring to a combination of assessed criteria and points of information, Ovum analysts provide detail on various deployment issues, including time, industries, services, and support.
Scalability: Points of information are provided to show the scalability of the solution across different scenarios.

Innovation: Innovation can be a key differentiator in the value that an enterprise achieves from a software or services implementation, and this is assessed in this criteria.

Integration: The integrations that the products have with key ERP, CRM, and third-party enterprise file sync and share products.

Market impact

The global market impact of a solution is assessed in this dimension. Market Impact is measured across five categories, each of which has a maximum score of 10.

- **Revenues:** Each solution's global ECM revenues are calculated as a percentage of the market leader's. This percentage is then multiplied by a market maturity value and rounded to the nearest integer. Overall global revenue carries the highest weighting in the market impact dimension.
- **Revenue growth:** Each solution's revenue growth estimate for the next 12 months is calculated as a percentage of the growth rate of the fastest-growing solution in the market. The percentage is then multiplied by 10 and rounded to the nearest integer.
- **Geographical penetration:** Where the information is provided, Ovum is able to establish the geographical reach of the product, both in terms of regional brand recognition and physical presence. Sales operations and provision of local support are also given merit.
- **Data center presence:** Ovum determines each vendor's data center presence through the total number of data centers they own, or third-party data centers in which they host their ECM platforms.
- **Data center penetration:** Ovum determines each vendor's data center presence in three regions: the Americas, Europe Middle East and Africa, and Asia-Pacific, either through vendor-owned data centers, or hosting their software in a third-party data center.

Ovum ratings

- **Market leader:** This category represents the leading solutions that we believe are worthy of a place on most technology selection shortlists. The vendor has established a commanding market position with a product that is widely accepted as best of breed.
- **Market challenger:** The solutions in this category have a good market positioning and the vendor is selling and marketing the products well. The products offer competitive functionality and a good price-performance proposition, and should be considered as part of the technology selection.
- **Market followers:** Solutions in this category are typically aimed at meeting the requirements of a particular kind of customer. As a tier-1 offering, they should be explored as part of the technology selection.
Ovum Decision Matrix Interactive

To access the ECM in the Cloud Ovum Decision Matrix Interactive, an online interactive tool providing you with the technology features that Ovum believes are crucial differentiators for leading solutions in this area, please see the Ovum Decision Matrix Interactive tool on the Ovum Knowledge Center.

Market and solution analysis

Ovum Decision Matrix: ECM in the Cloud, 2017–18

Although the ECM market is very mature, ECM in the cloud is still relatively new, although some vendors have been offering cloud-based ECM systems for many years, with some of the smaller vendors in the cloud-ECM space being the longest established. The key to successful cloud applications is how the products have been architected for the cloud. Vendors that simply run their on-premises software in the cloud are unlikely to offer the value enterprises expect from cloud services. Integration is an important aspect of cloud-based ECM and it is therefore imperative that vendors offer out-of-the-box integrations with back-end systems including ERP, CRM, and HR, as well as third-party ECM repositories. Integrations should work with third-party, cloud-based applications as well as on-premises systems. While most ECM vendors host their own cloud solutions, smaller vendors might use a third-party cloud provider, and the larger vendors use their own data center facilities to operate their own clouds. Issues such as data sovereignty are usually catered for, with most vendors either providing or having access to cloud facilities in multiple geographical regions.
Figure 1: Ovum Decision Matrix: ECM in the Cloud, 2017–18

Source: Ovum
Figure 2: Expanded view of Ovum Decision Matrix: ECM in the Cloud, 2017–18

Table 1: Ovum Decision Matrix: ECM in the Cloud, 2017–18

<table>
<thead>
<tr>
<th>Market leaders</th>
<th>Market challengers</th>
<th>Market followers</th>
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<tbody>
<tr>
<td>OnBase by Hyland</td>
<td>Alfresco</td>
<td></td>
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<tr>
<td>IBM</td>
<td>Kofax</td>
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<tr>
<td>Microsoft</td>
<td>Nuxeo</td>
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<td>OpenText (Documentum)</td>
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<tr>
<td>OpenText (Content Suite)</td>
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<tr>
<td>Oracle</td>
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Source: Ovum
Market leaders: Hyland, IBM, Microsoft, OpenText, and Oracle

Hyland, IBM, Microsoft, OpenText (Documentum and Content Suite), and Oracle fall into the market leader category for this Ovum Decision Matrix.

OnBase is an enterprise information platform with more than 300 modules that share a single code base. Components are available to organizations on the application of licenses. OnBase is available in the cloud as well as on-premises. Hyland offers a mature hosted solution and it is now 14 years since OnBase was first made available in the cloud. Hyland has more than 700 customers who have deployed OnBase in the cloud. This might sound like a low number given the number of years that the product has been available through this deployment model, but take-up of the cloud has been slow in ECM, and many vendors would be envious of this number. At the time of writing, it was announced that Hyland had entered an agreement to acquire Kofax’s Perceptive portfolio. The sale has now completed, but it is too early to say what impact this will have on the OnBase and Perceptive portfolios.

IBM is a leading ECM vendor with an extensive portfolio of tightly integrated products, comprising Content Foundation on Cloud, Content Navigator, Case Manager on Cloud, Datacap on Cloud, Watson Explorer Enterprise Edition, and Enterprise Records on Cloud. It offers a unified experience across on-premises and cloud deployments, which enables it to offer flexible deployment options, where organizations can run a combination of on-premises and cloud deployments. The portfolio is arranged across five functional areas: capture, case management, social and collaboration, analysis, and compliance and governance.

Microsoft SharePoint and Office 365 have extremely large customer bases that are the envy of other ECM vendors. SharePoint has extensive capabilities that provide the level of content security that enterprises require, including records management and retention; information rights management, where Microsoft has one of the leading solutions; data loss prevention features; auditing; and conditional access policies. Microsoft has a major advantage over its competitors in that it has a huge ecosystem of partners that provide complementary solutions that extend the capabilities of SharePoint.

OpenText is the only vendor to have two products in this Ovum Decision Matrix. Documentum is a recent acquisition for OpenText from Dell Technologies that completed in January 2017. The benefits of the acquisition are already being seen through the rapid development of LEAP, the next-generation platform-as-a-service, which incorporates content-centric applications that address very specific use cases. Documentum development had suffered for a couple of years once the acquisition of EMC by Dell was announced, and its sale became inevitable. Under the ownership of OpenText, the future looks much brighter, and the vendor has differentiated the use cases for Documentum and OpenText Content Suite. By offering a choice of ECM platform, and building services on top of these platforms, functionality and applications can be shared by Documentum and Content Suite, which means that Documentum customers will be able to take advantage of features such as experience management. By the same token, Content Suite customers can access LEAP apps, most of which came as part of the Documentum acquisition. OpenText is differentiating the use case scenarios for each of its ECM platforms. Built on Content Suite, OpenText provides Extended ECM solutions that integrate with multiple business applications in the ERP, CRM, and HR space, including SAP, Salesforce, Oracle, and Microsoft SharePoint.
Oracle has an advantage over some of its smaller competitors because it is a multiple product vendor that has capabilities in technologies such as ERP and CRM that have been adopted in the cloud much more quickly and extensively than ECM. Its ECM portfolio includes Content and Experience Cloud, WebCenter Content, WebCenter Imaging, WebCenter Enterprise Capture, WebCenter Forms Recognition, WebCenter Portal, and WebCenter Portal Cloud Service (including WebCenter Content). These are a set of tightly integrated products that together manage the lifecycle of content and provide extensive capabilities. Functionality includes document management, content collaboration, desktop productivity integration, document workflow, digital asset management, CDN-enabled content delivery (cloud only), enhanced enterprise applications, hybrid integrations, records management, and content analytics. Its portfolio can be deployed on-premises, in the cloud, or in hybrid scenarios.

Market challengers: Alfresco, Kofax, and Nuxeo

Alfresco, Kofax, and Nuxeo are challengers in this Ovum Decision Matrix.

Alfresco is an open source vendor that has enjoyed success in financial services (banking, insurance), government, healthcare, and manufacturing. It is also acquiring new customers in the private sector as the ECM market continues to consolidate and organizations look to move away from content platforms that have changed hands and face a period of uncertainty. Alfresco is a well-established vendor with a full-featured ECM portfolio. It may not have as many features as some of the larger platforms, nor provide the capabilities offered in some of the new areas added to large ECM portfolios, but for many organizations its capabilities are sufficient, and it boasts several large enterprises among its customers. Flexible deployment options, including on-premises and a range of cloud choices, will suit the requirements of virtually any organization, and the ability to access content stored in the cloud or on-premises, regardless of the deployment type, allows organizations to adopt hybrid models easily.

Kofax has undergone a great deal of change over the past few years. Originally a capture and scanning vendor, it expanded into business process management (BPM), with the acquisition of Singularity, to help it provide content-centric processes. In 2015, it was acquired by Lexmark, which also acquired ECM vendors Perceptive Software and Saperion. All of these vendors’ products have been integrated to create an extensive ECM suite. In 2016, Lexmark’s Enterprise Software group was separated from Lexmark and rebranded as Kofax. This has created a new player in the ECM space (even though its ECM portfolio is based largely on the Perceptive products) and is an indication that the ECM market is still consolidating, a process that has been under way for several years. The Kofax ECM portfolio offers an impressive range of capabilities, including multichannel capture, extraction and verification, case management, workflow and process automation, robotic process automation, customer communication management, authentication and facial recognition, and e-signature and signature verification.

Nuxeo is a well-established open source ECM vendor that completely rearchitected its product a few years ago. It also moved its headquarters from France to the US, which has paid off. The company has been able to raise its profile and gain a number of enterprise customers as a result, growing its average deal size. When it rearchitected its product, Nuxeo recognized the importance of the cloud, and unlike some of its competitors, which simply ported their existing architecture to the cloud, it took this opportunity to make its platform cloud-ready. This has enabled it to win deals against much larger competitors, including other open source vendors and large, traditional ECM players. Nuxeo can also
be implemented on-premises or in a hybrid scenario, which will appeal to organizations that are not ready to move all their content to the cloud.

Market followers

ECM is a very mature technology, and all of the vendors featured are well-established with a wide range of features and functions built up over many years. There are therefore no vendors that fit into the market follower category in this Ovum Decision Matrix.

Market leaders

Market leaders: Technology

IBM, Microsoft, and OpenText (Content Suite) are the market leaders in document management and collaboration, but this is one of the areas where there is least difference between the highest and the lowest scoring vendors, demonstrating that there is not much differentiation between vendors in terms of capabilities in this area. The highest scoring vendors in information rights management are Microsoft and OpenText (both products). This is a technology where only a few vendors have their own capabilities, with most vendors relying on third-party products. Microsoft, OpenText (Content Suite), and Oracle are the leading vendors in records management. Lack of support for certification standards is an area that lets some vendors down. In content analytics, IBM, Microsoft, and OpenText (Content Suite) have the highest scores. These are all vendors that have extensive analytics.
capabilities. It is in the BPM area that there is a difference between vendors in terms of the highest and lowest scores, but Microsoft, OpenText (Content Suite), and Oracle all score maximum points. In capture and scanning, Hyland, IBM, OpenText (both products), and Oracle score maximum points. In search, IBM, Microsoft, Nuxeo, and Oracle are the leading vendors. For cloud capabilities, IBM, Microsoft, and Nuxeo are the leaders. IBM and Microsoft maintain their own clouds, but Nuxeo uses a third-party cloud on which it hosts its portfolio. Finally, in architecture and administration, IBM, Kofax, and Microsoft come out on top.

**Market leaders: Execution**

**Figure 4: Ovum Decision Matrix: ECM in the Cloud 2017-18: Market leaders – execution**

ECM in the cloud is much less mature than ECM in general, and this is reflected in the scores in the maturity area, which are generally lower than for other areas. Hyland, Nuxeo, and OpenText (ECD) are the highest scoring vendors. In terms of interoperability, Hyland IBM, Microsoft, Nuxeo, and OpenText (Content Suite) score maximum points, as this is an important area for cloud solutions. In terms of deployment Hyland, Microsoft, and Oracle are the highest scoring vendors. This is an area that is important to enterprises because ECM can be complex and difficult to implement, and vendors need to simplify the process. All ECM platforms are extremely scalable and Alfresco, Microsoft, OpenText (both products), and Oracle all score maximum points. In innovation, Alfresco, IBM, Microsoft, Nuxeo, OpenText (Content Suite), and Oracle have maximum scores. For integration IBM, Microsoft, and OpenText (Documentum) have the highest scores. All vendors provide APIs and support CMIS to help customers to create custom integrations, and many provide native connectors to common applications.
Market leaders: Market impact

In terms of market revenue, IBM, Microsoft, and OpenText are the largest vendors. This is the area where there is greatest difference in range between the largest and smallest vendors. Hyland, IBM, and Microsoft score highest in terms of revenue growth. Although the smaller vendors, particularly Alfresco and Nuxeo have the greatest growth rate in terms of percentage, because they have much smaller revenues in monetary value, their growth is lower than the large vendors. For geographical penetration, Microsoft, OpenText, and Oracle have the highest scores. In terms of data center presence, IBM, Microsoft, and OpenText score highest. These are all vendors that provide their own data centers. Microsoft, OpenText, and Oracle score best in terms of data center penetration, which covers the location of data centers.
Vendor analysis

Oracle WebCenter Content v12.2.1.2 (Ovum recommendation: Leader)

Figure 14: Oracle WebCenter Content v12.2.1.2 radar diagrams

Source: Ovum

Ovum SWOT assessment

Strengths

Content and Experience Cloud enables users to collaborate on content

Users can easily collaborate on content, both internally and with external teams, from any device and at any time. Content can be discussed, shared, and annotated on any device (mobile, web, or desktop). With desktop applications, content can be synced to the desktop and then integrated into productivity tools such as Microsoft Word, PowerPoint, and Excel.

Content analytics are included in the portfolio
Endeca Search and Information Discovery powers Oracle's analytics capabilities. It provides robust administrative analytics and search, including insights into the usage of the cloud service.

Integration with back-end systems allows users to work within their enterprise applications

Content can be integrated and managed contextually from within enterprise applications both in the cloud and on-premises, which means that users can work within their normal transactional applications and access content stored in Oracle WebCenter Content without being aware that they are using an ECM application. No-code embeddable UIs for content management in external apps are provided, along with APIs to manage and render content.

A large portfolio of ECM-related products is provided in the cloud

Oracle’s portfolio of ECM-related products in the cloud is provided with Content and Experience Cloud and the WebCenter brand. Products include WebCenter Content and WebCenter Portal, which enable users to manage documents, images, rich media files, metadata, and records from the point of creation or capture to archiving or deletion.

Weaknesses

Oracle does not provide information rights management (IRM) capabilities

The portfolio is extensive, but Oracle does not include out-of-the-box IRM, and a third-party solution is required for this. Although IRM is not yet a standard ECM feature, some vendors are beginning to add it, particularly for file sync and share.

Opportunities

Oracle can combine third-party applications with Content and Experience Cloud to provide a central cloud content exchange

Content and collaboration services can be provided for ERP systems to more easily exchange documents, such as invoice statements and credit applications, with customers and internally among teams. SaaS applications can likewise be extended to use Content and Experience as a simple way to collaborate on, manage, and store opportunity-related documents by sales teams. Process Cloud can be positioned to complement Content and Experience to provide process automation such as triggering approvals and notifications, and enabling the classification and filing of business documents. Partner, product, and reference connectors are available for many Oracle systems.

Content and Experience provides services around digital asset management, content management, and delivery of content to multiple channels

Oracle can increase its presence by leveraging use cases to deliver customer or employee experiences, enabling employees to exchange information and engage with the organization, or customers to interact with the company. Combining digital content, structured content such as blogs and articles, and interactive data-driven applications to create rich experiences that are then delivered through multiple channels can provide a competitive advantage. Content and Experience enhances SaaS applications such as marketing automation and commerce with centralized cloud-based content management and collaboration, using features such as approvals, versions, tagging, and metadata.

Threats

Take-up of ECM in the cloud has been slow to date
A major threat to ECM vendors wanting to increase their share of the cloud market is the reluctance of organizations to adopt ECM in the cloud. To date, most deployments have been in private, rather than public, clouds. Security concerns are often cited as deterrents to storing content in the cloud. Vendors need to persuade customers that cloud-stored content can be more secure than on-premises stored content.

**Competition is stiff in the ECM market**

A large number of ECM vendors provide cloud-based services, with little to choose from between them in terms of functionality. If it is to remain competitive, Oracle needs to ensure that it continues to look for opportunities to extend the functionality of its ECM portfolio.

### Appendix

**Methodology**

- Vendor events and analyst briefings.
- Vendor meetings and technology assessments.
- Interviews with end users.
- Discussions with service providers.

**Further reading**

*Fundamentals of ECM in the Cloud*, IT0014-003261, May 2017


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**Ovum Consulting**

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