ECM Trends and Developments – an 18 Month Vision

By EmTAG

> This article is a summary of the views of the members of the AIIM Emerging Technology Advisory Group (EmTAG), a group of forward-looking analysts, consultants, and leading users. The first part of this article discusses the ECM market and the second part discusses key ECM product trends.
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> AIIM professional members can read the entire document, as well as additional articles, at www.aiim.org/emtag.

The members of EmTAG identified a number of trends for 2006 in the enterprise content management market. These trends are divided into market and technology trends. As with every year for the past half-decade, at least, the coming/existing role of Microsoft, and more recently Oracle, came up again.

Infrastructure content management (ICM), based on SharePoint and Oracle Files, is really coming. Microsoft has emerged as a significant force within the ECM market over the past several years as Sharepoint deployments multiply virally across organizations. The best evidence of the impact of Microsoft on the market can be seen by the rush by a number of independent ECM vendors to seek out deeper partnerships with the company.

We expect that the numbers of full scale ECM deployments will not increase in 2006 because the promise of cheaper and lightly capable basic content services (starting with SharePoint and extended by Oracle, IBM, then SAP) will hold spend back. The response by ECM suites will be to focus on becoming process platforms for CEVA (content-enabled vertical applications) and distinguishing themselves through logo programs from their VARs and ISVs. By 2008, most of the G2000 companies will have desktop-focused and process-focused ECM implementations, with Basic Content Services (BCS) provisioning around 65% of casual employee content contribution and consumption. Leading ECM suites will go vertical, and BCS will serve horizontal needs.

Other market trends include continued ECM vendor consolidation, litigation and compliance as a driver of ECM investment, and an increase in ECM services available as Web-based services.

ECM – Product Trends

The world of ECM will be brought into the infrastructure model of a service oriented architecture (SOA) forcefully in 2006. For the ECM audience, this means heightened interest in metatags, information architectures, and standardized process flows. As more vendors design the newest products with the ability to be invoked as services and conversely invoke services, there will be a growing demand for service orchestration and choreography tools such as BPEL and ESB engines to manage services among multiple offerings. Many of the vendors of these engines are not among the typical ECM vendors, such as BEA, TIBCO, Oracle, Cape Clear, Sonic, and IBM.

In addition, the growth of XML as a file format for exchanging transactions both between business partners and among internal IT systems has driven the need to receive, transform, validate, transfer, and manage non-traditional documents (among them, XML files), some of which will eventually represent business records.

The systems that are used for these tasks are based on "application servers"—such as WebSphere (IBM) or WebLogic (BEA)—rather than being built upon a foundation of a document-centric repository that was acquired to handle file content.

Architecturally, these vendors are building systems by assembling components into their SOA solution. The role of the CM suite as the center of the document universe is being replaced with integrating selected CM components as satellites surrounding the application server and each component being invoked as a service. The technical community building these systems may not recognize AIIM as a source of technical, standards, and acquisition knowledge. They currently focus on vendors, magazines, and conferences outside of the AIIM sphere of influence. They typically need to integrate a set of CM/RM components on top of an application design, rather than starting with a traditional RFI/RFP or the acquisition of a CM suite to which other applications are integrated.

The bridge between business and IT strategy gets built when business analysts and IT process architects work together toward model driven architectures and applying business rules across the entire business information supply chain. The key standards in modeling, integration, and rules are emerging which may yield the opportunity to manage "dynamic content" toward the consumer (in a portal, usually) with the same rigor as structured data.

Other trends include problems around information access, partially addressed by current search and auto-categorization software; email integration; federated and enterprise records management; and content federation and integration. ▢