

Trends in Electronic Records Management and related technologies

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Introduction to Ovum

The leading European authority on telecoms, software and IT services

200 employees in nine offices around the world

Depth of expertise across ICT in companies, markets and technologies

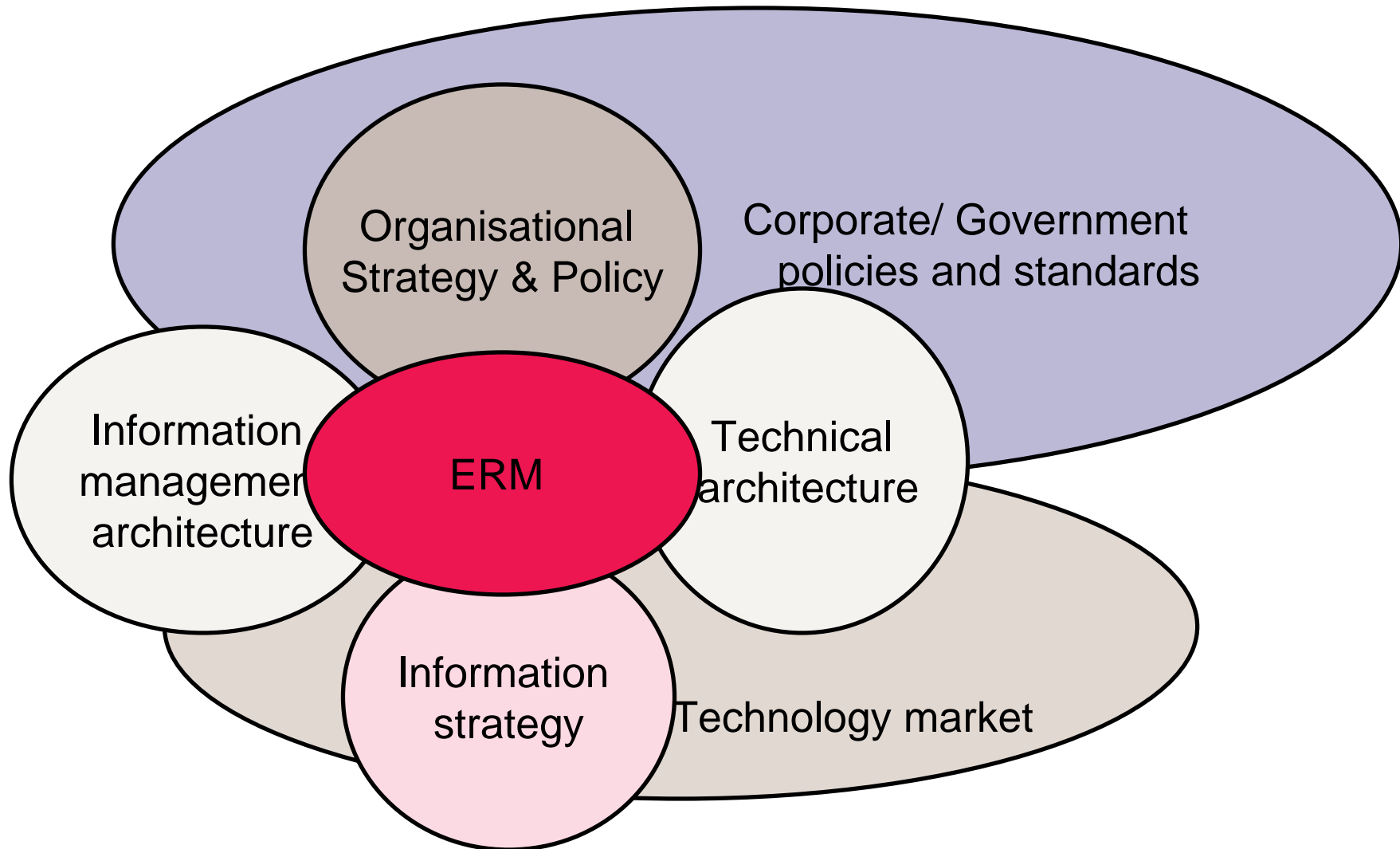
Advising ICT companies, governments, investors and users

Dedicated public sector team with focus on UK public sector software & IT services market



Expertise in companies, markets and technologies

ERM in context



ERM : new levels of visibility

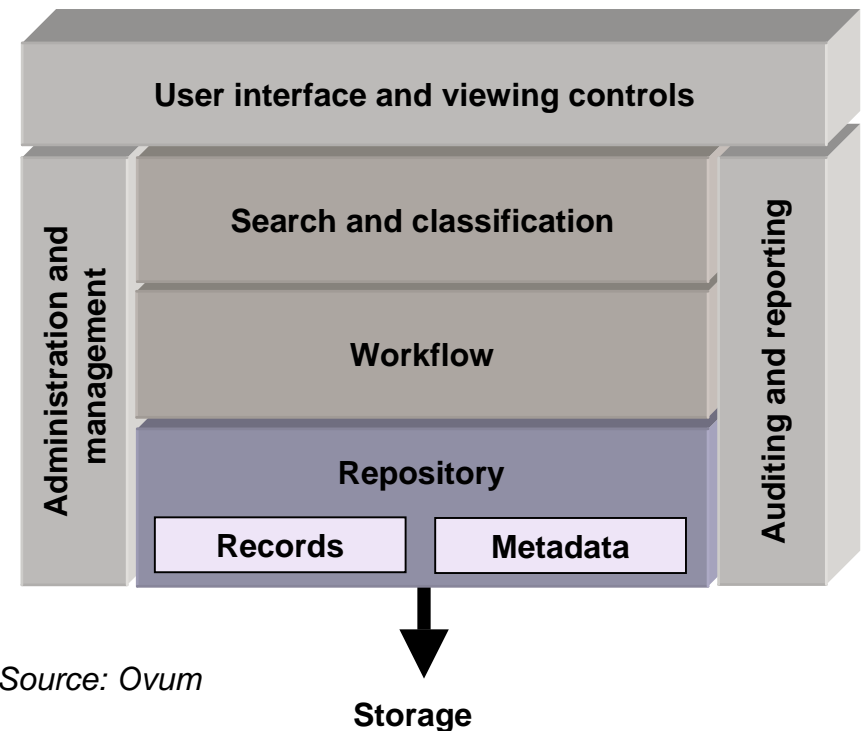
Driven by legislative requirements and business change

- Freedom of Information
- Compliance in the commercial world
- E-government and e-business requirements

But still not widely understood

- Value underestimated by wider organisation
- Technology immature
- Rarely considered as part of wider information management strategy

The Ovum model for ERM



ERM is maturing but some way to go

Areas of strength

- Manual declaration and classification of records, and basic search and retrieval capabilities.
- Electronic record storage, auditing capabilities and record destruction

Areas of improvement

- Support for automatic classification
- Integration with third-party user interfaces
- Integrated search capabilities
- Support for different types of records: electronic files, paper, e-mails, video etc

Areas of weakness:

- The provision of context for records
- The ability to maintain records over long periods of time.

The future for ERM

Continued interest in ERM driven by compliance and legislation for next 2 years

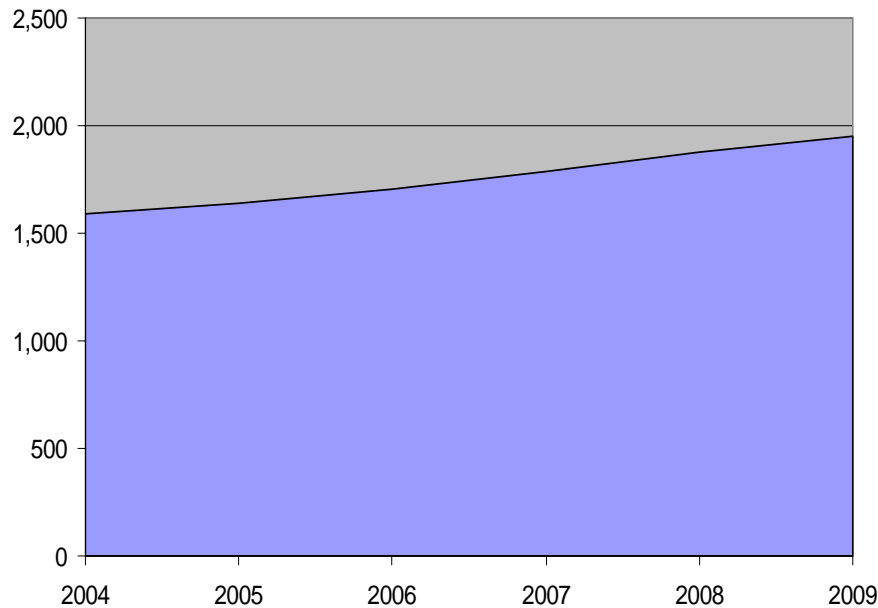
- The public sector remains a major source of ERM revenues and accounts for much of the growth in the market.

ERM is being absorbed into the wider ECM market

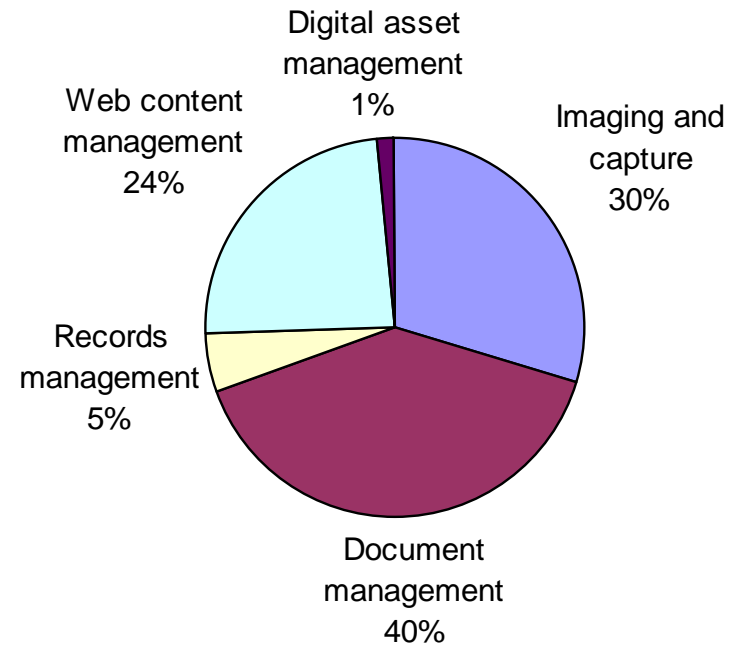
- Standalone market virtually disappearing, small vendors pushed out by the increased competition and falling software prices.
- Dominated by infrastructure players as part of ECM offering + small number of specialist ECM leaders
- ECM vendors will deliver records management capabilities and principles as integral parts of their core solutions, rather than as add-ons, or loosely integrated modules
- Specialist suppliers also moving to 'federated' approach to survive

The ECM/ERM Software Market

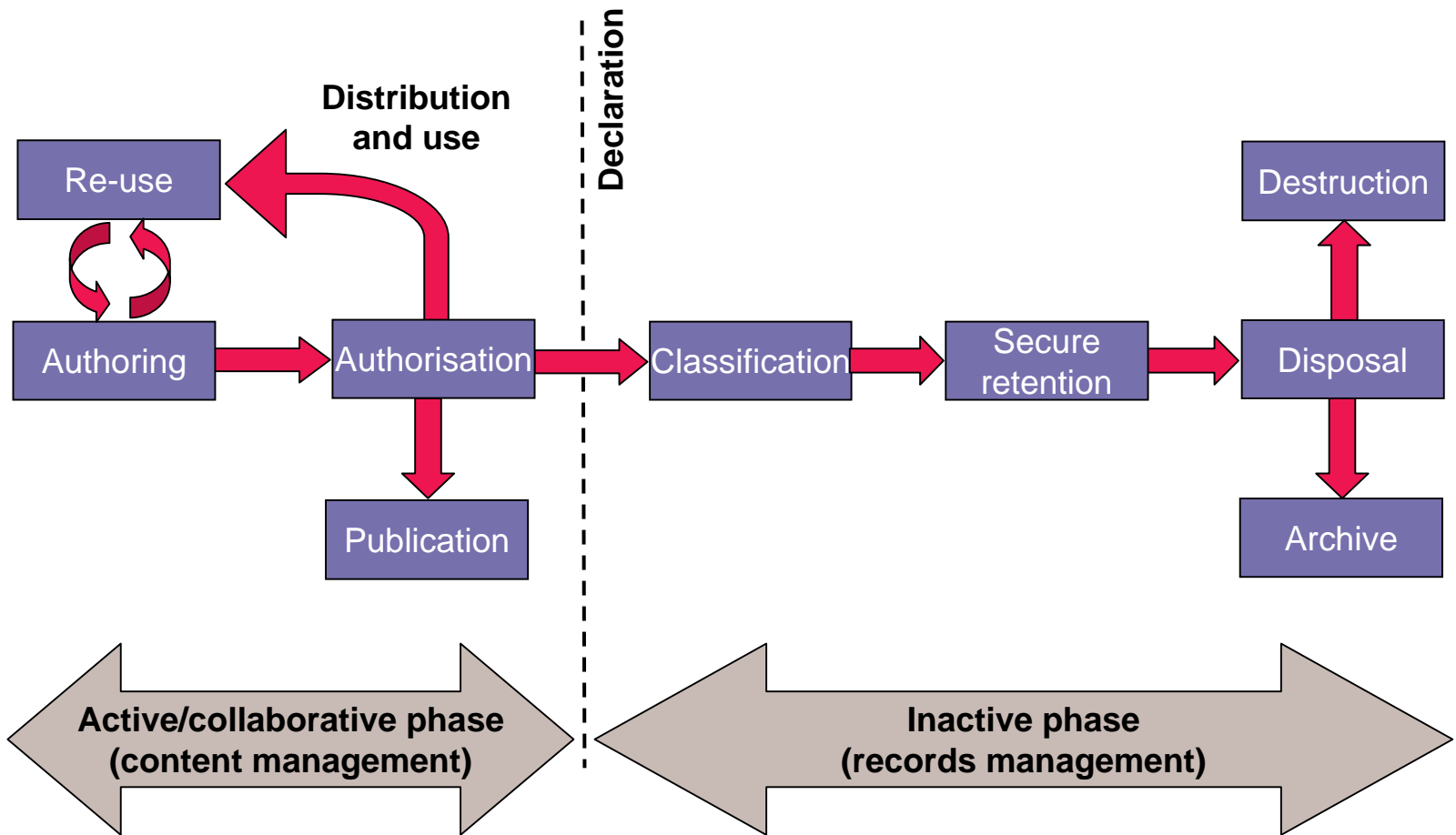
Market size for ECM
(licence revenues)



Division of CM revenues by
technology segment

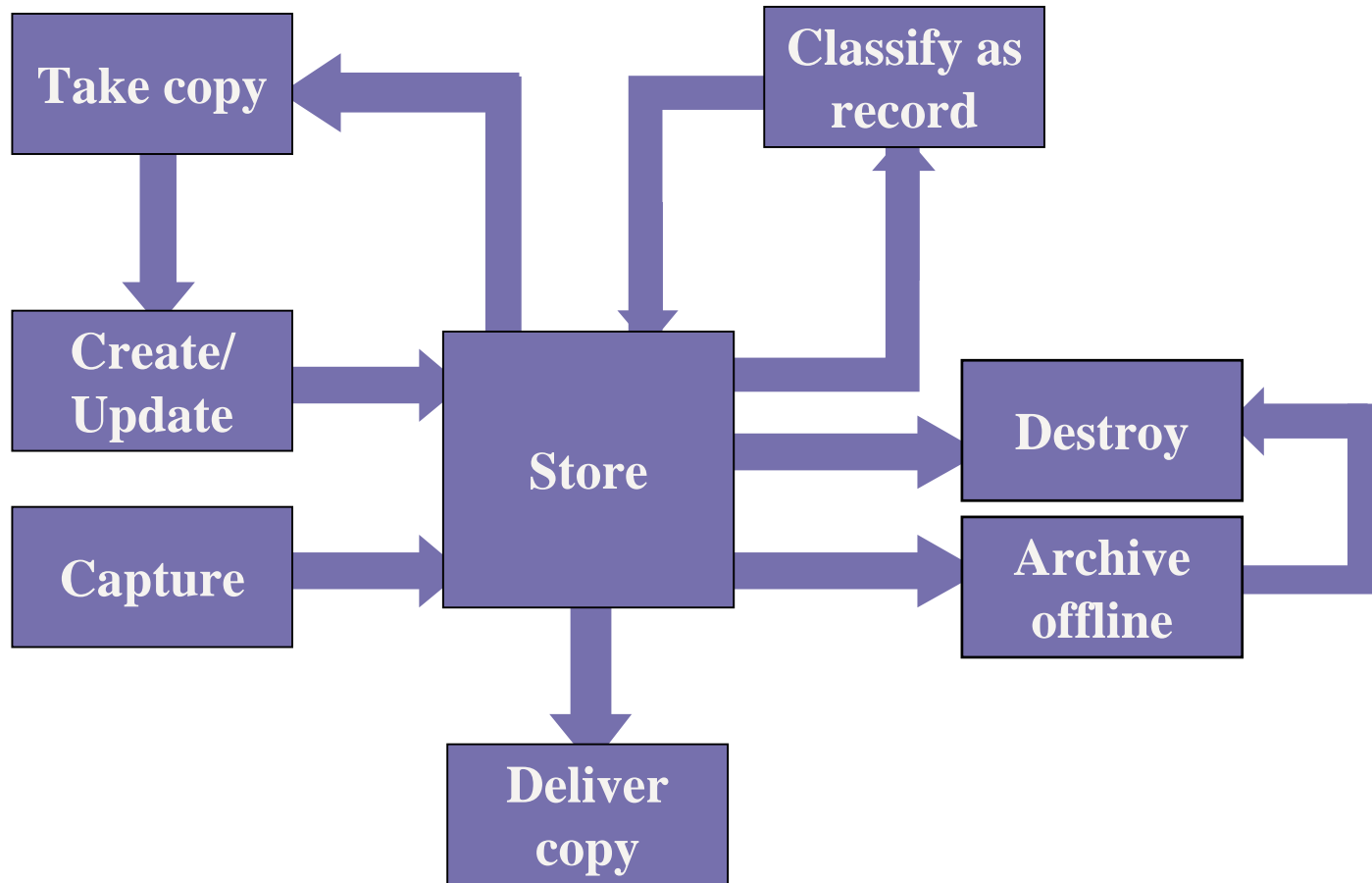


“Traditional” view of document management and ERM

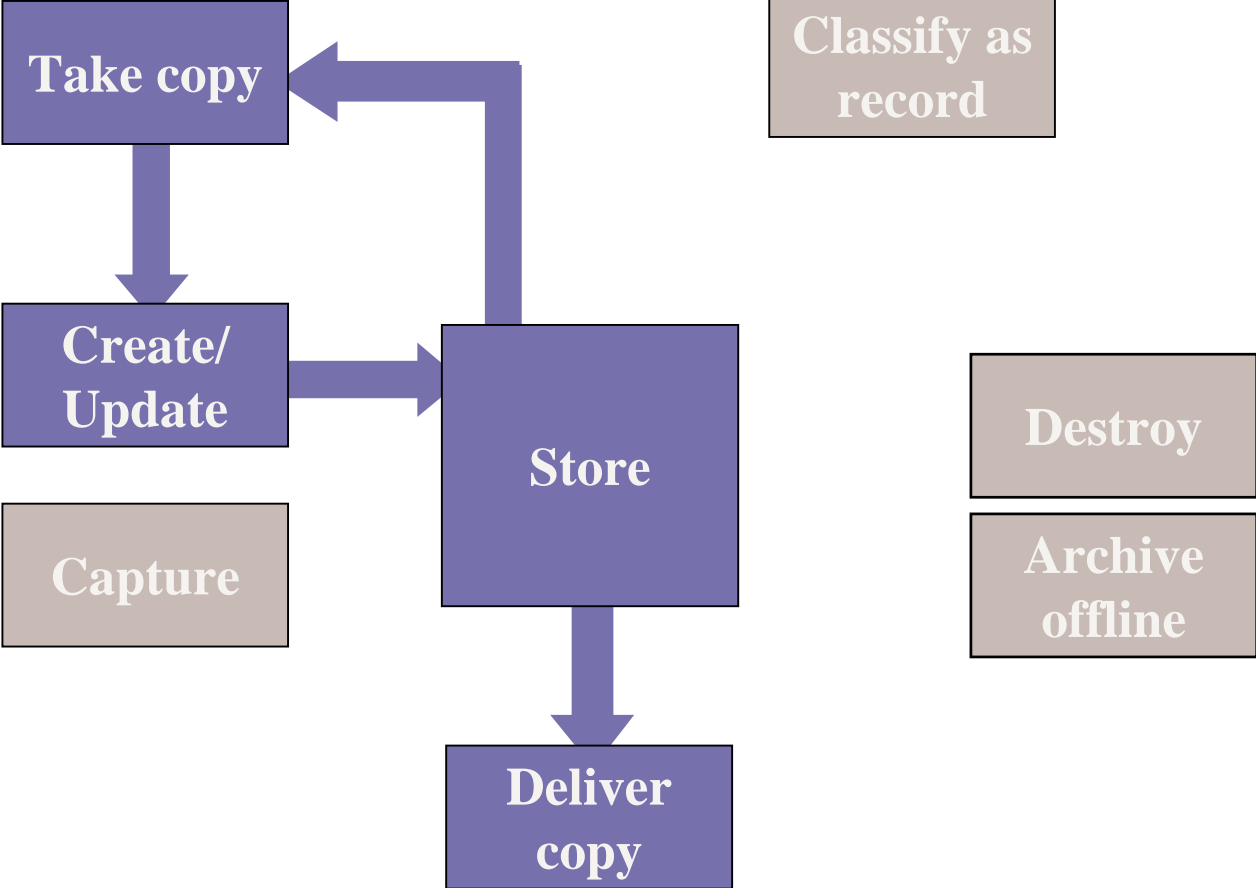


Source: Ovum

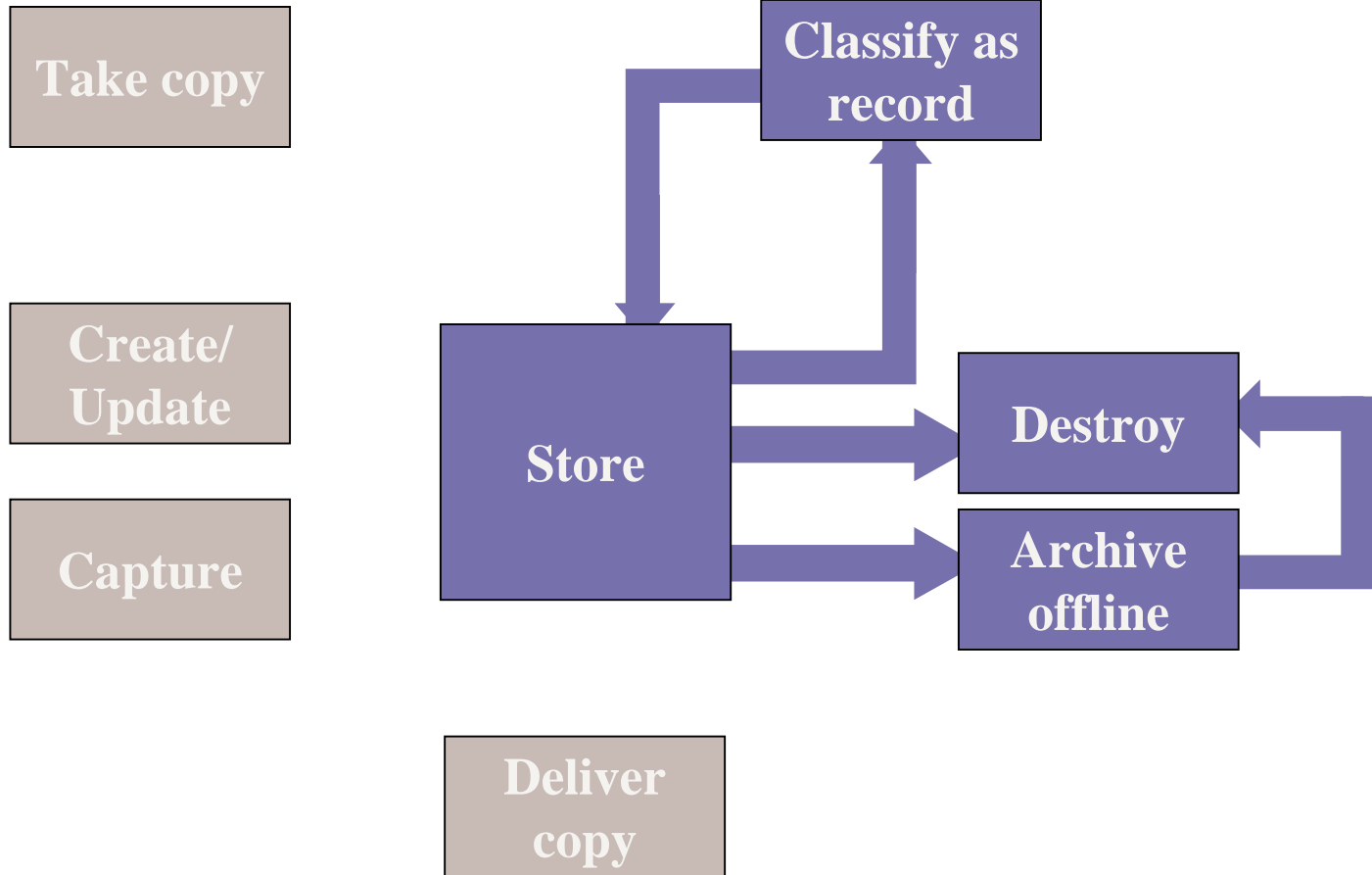
The content lifecycle view



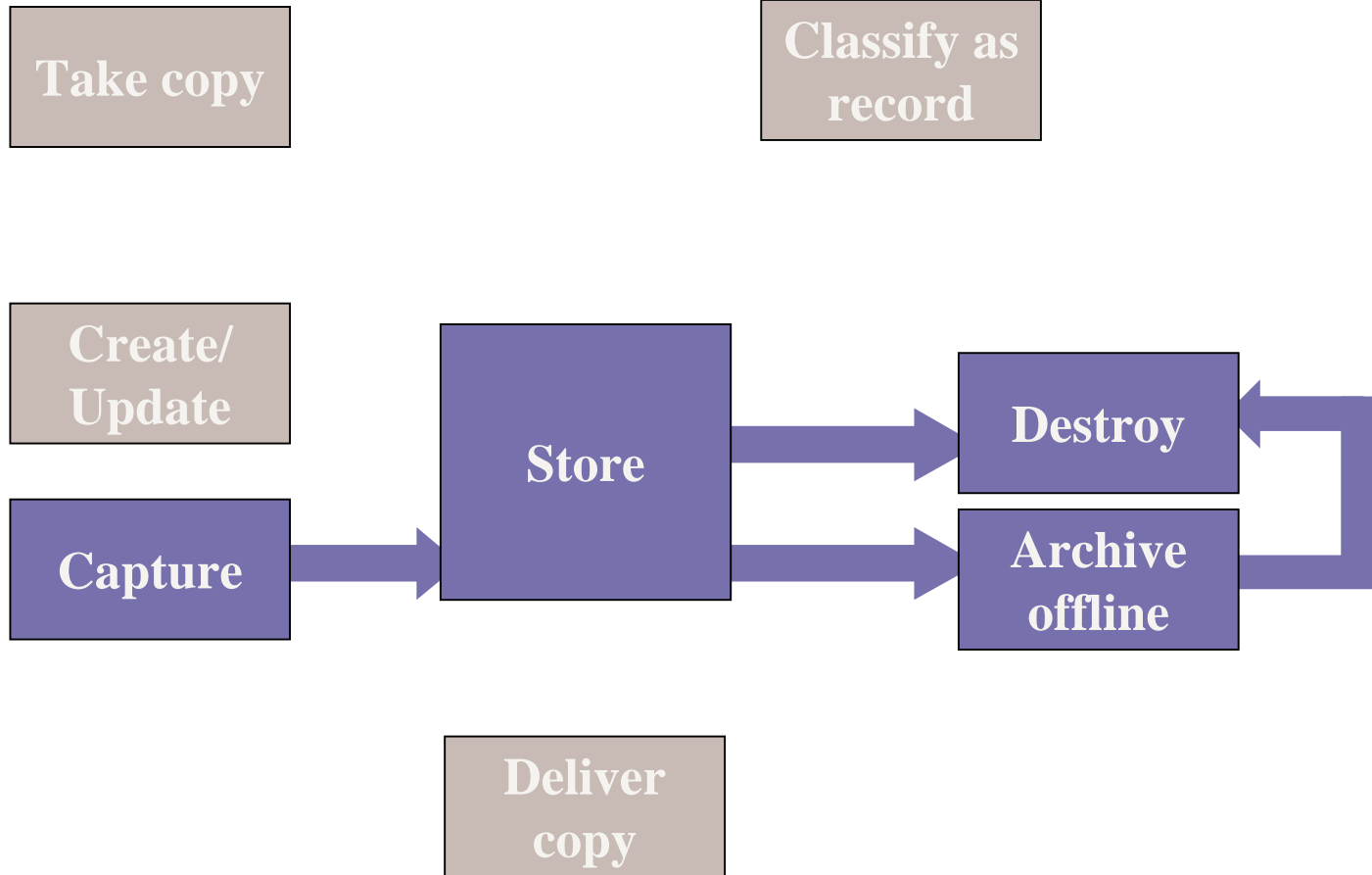
Content mgmt and web publication



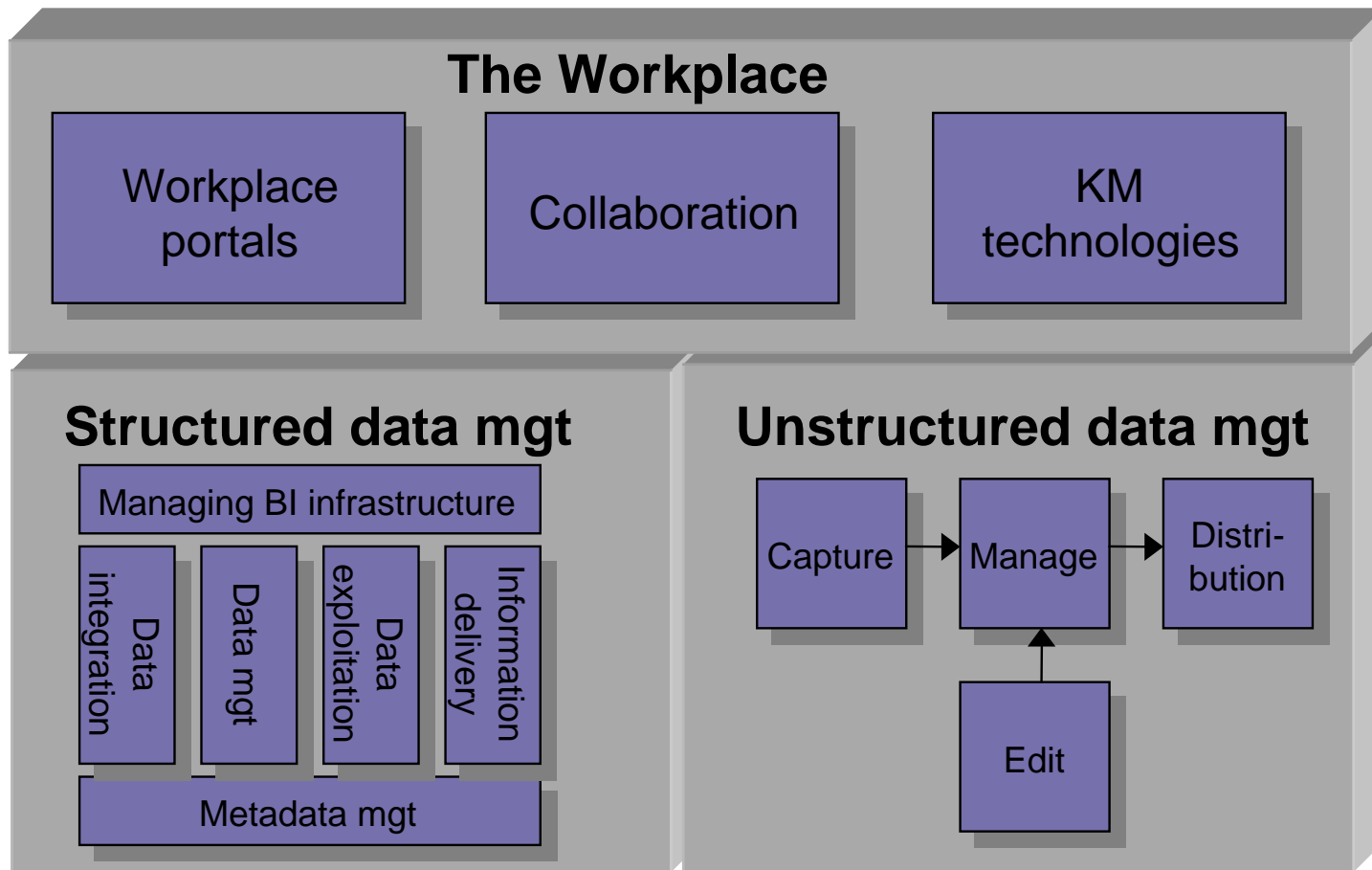
Records management



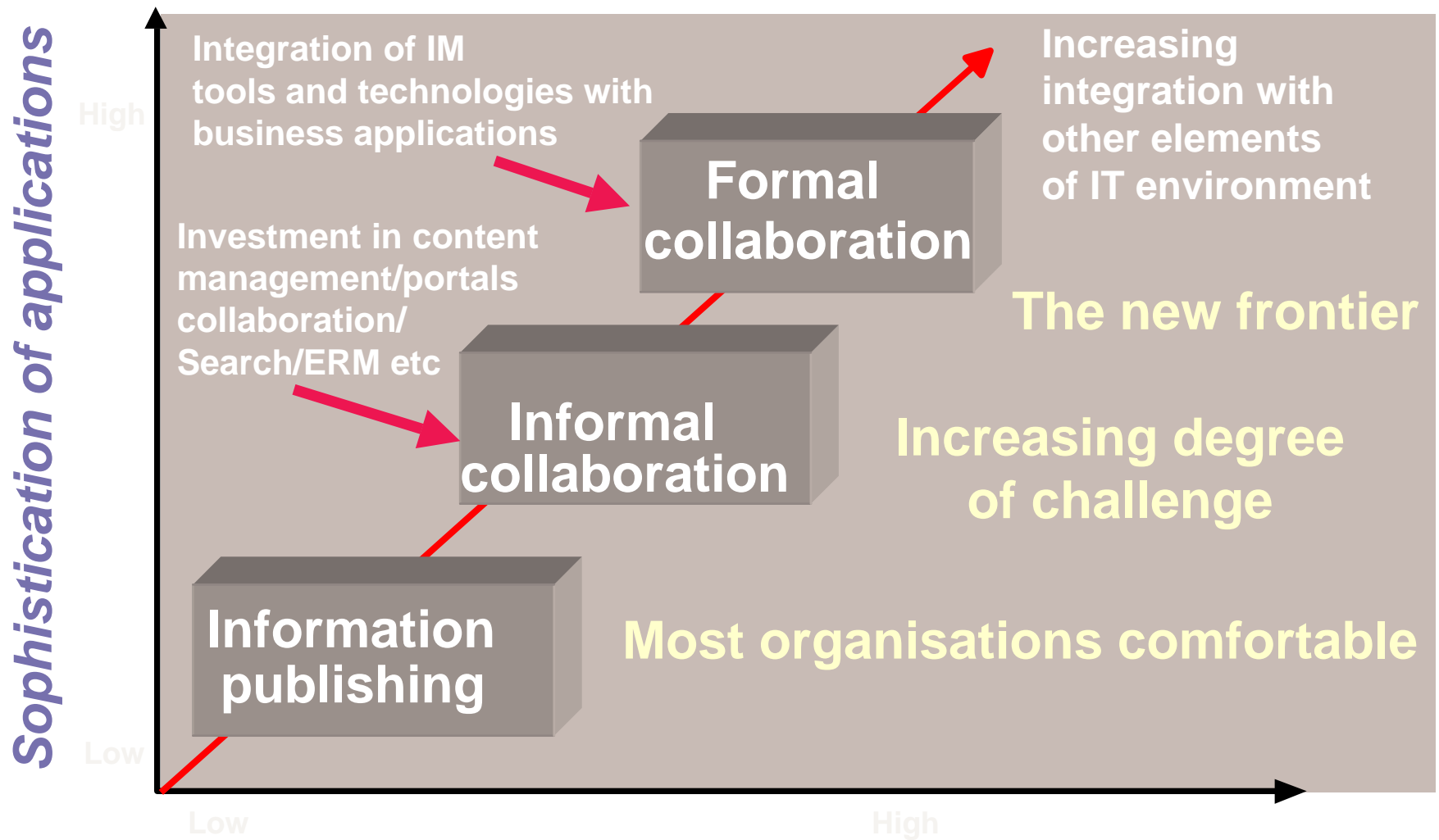
Email management



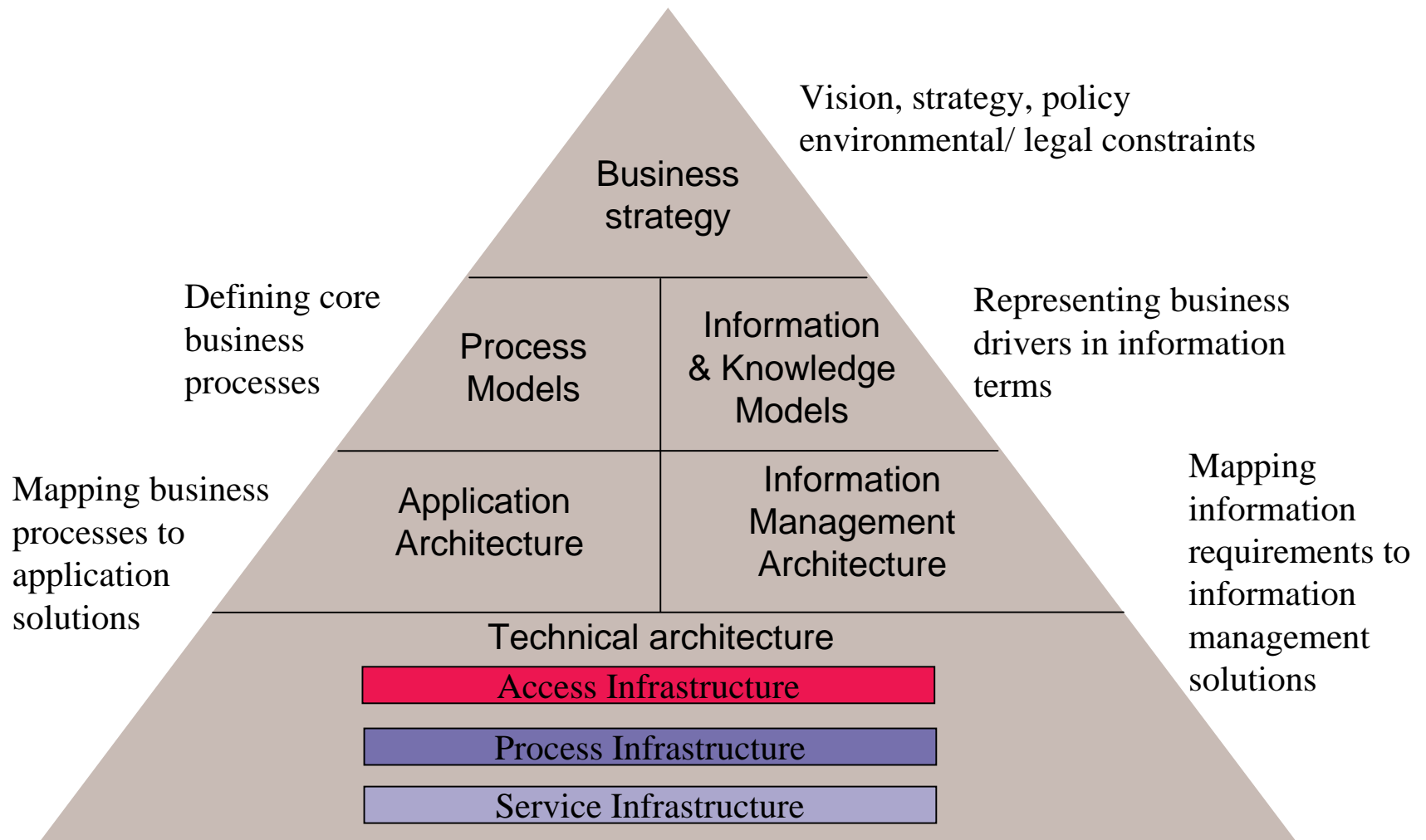
The new information management landscape



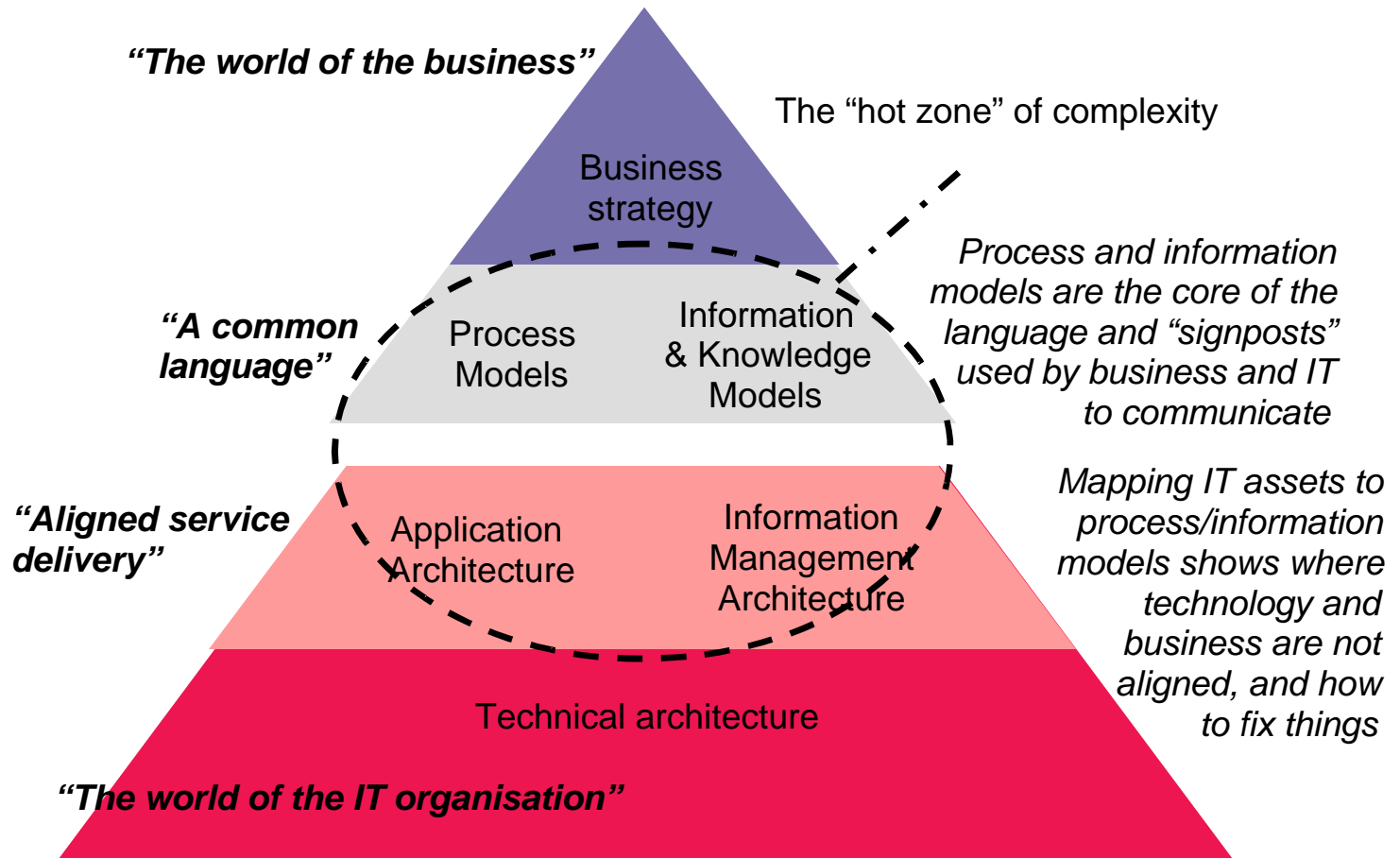
The evolution of information management strategies



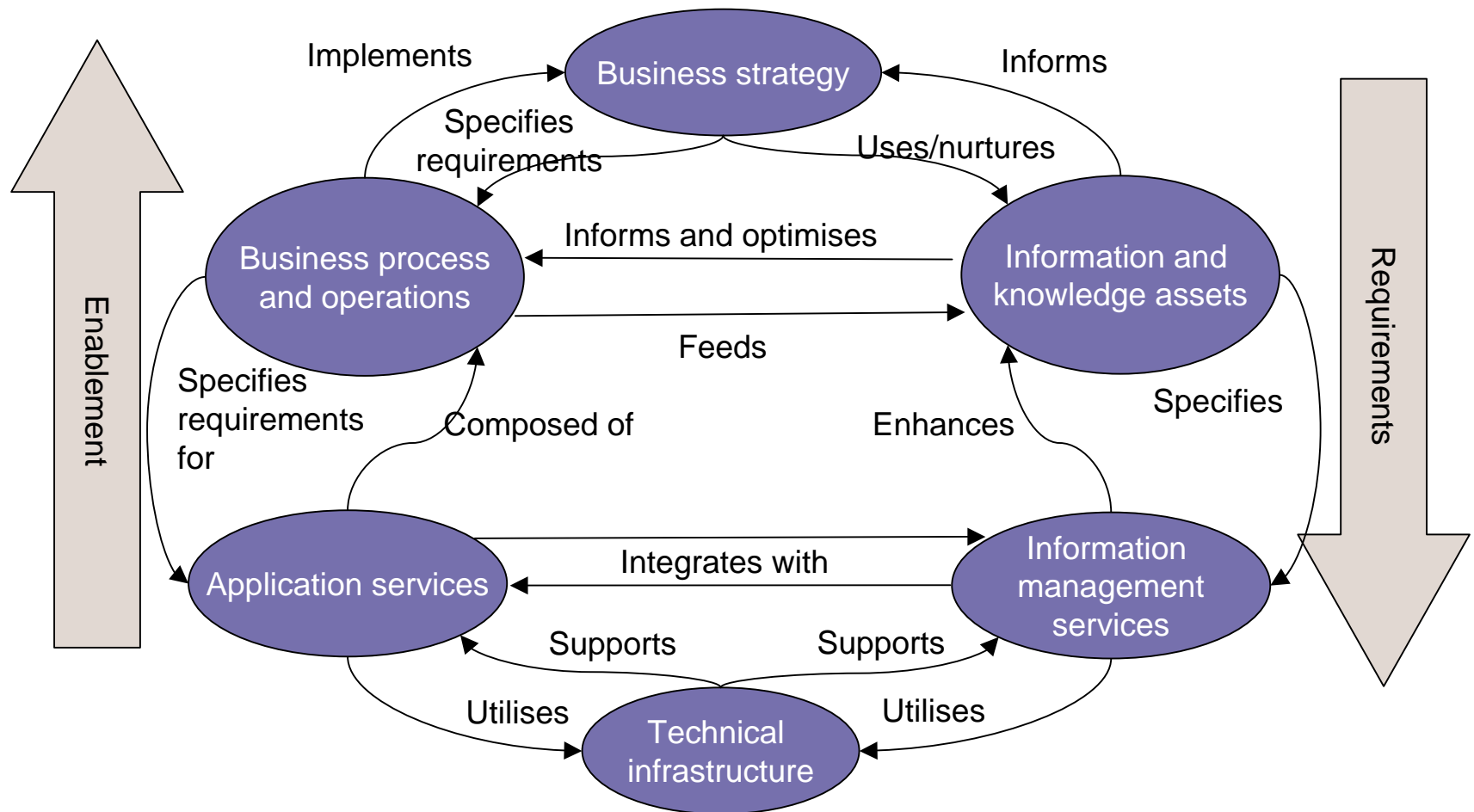
An enterprise architecture framework



IT and Business Alignment



Promoting communication and interaction



Key messages

ERM market has developed significantly over last two years – this means technology should be less of a barrier

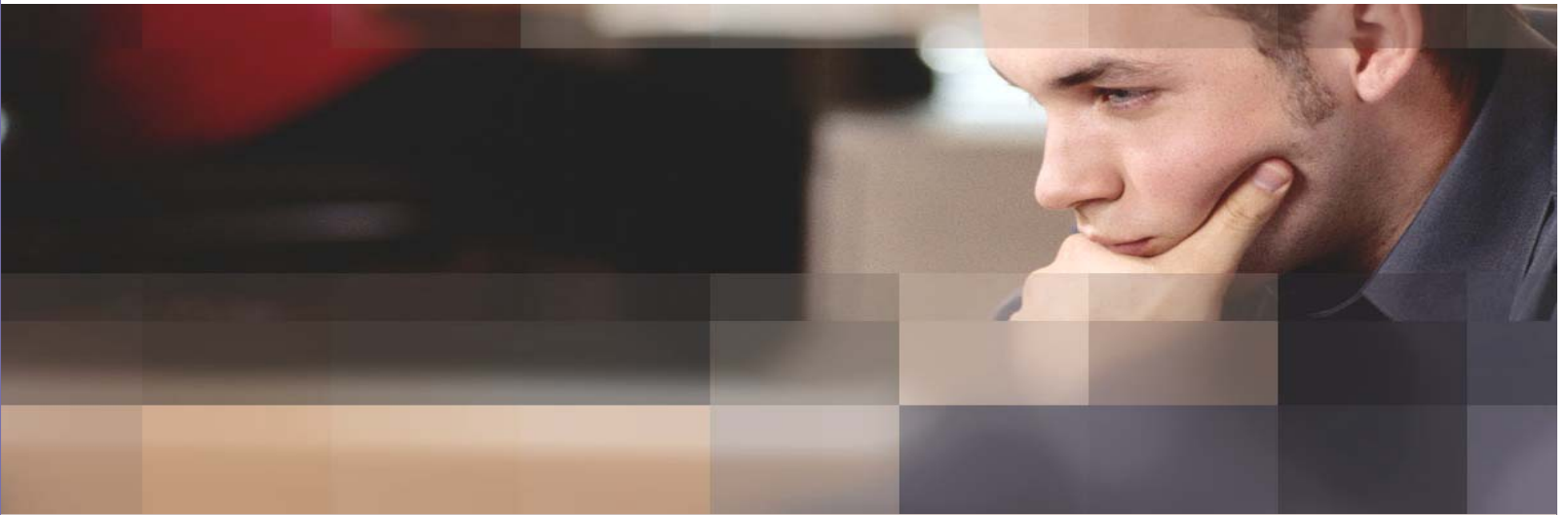
But ERM market is still not mature - the next few years will see further improvements in technology and market consolidation

Records management is about process and policy first, software second

ERM should be implemented as part of a broader information management strategy

The information strategy itself needs to fit into the broader business and technical strategy of the organisation





Thank you

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