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

Corporate/ Government policies and standards

Organisational Strategy & Policy

Technical architecture

Information strategy

Information management architecture

Technology market
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

Source: Ovum
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

- Imaging and capture: 30%
- Document management: 40%
- Records management: 5%
- Web content management: 24%
- Digital asset management: 1%
“Traditional” view of document management and ERM

Authoring → Authorisation → Classification → Secure retention → Disposal

Active/collaborative phase (content management)

Distribution and use

Authorisation

Publication

Inactive phase (records management)

Destruction

Archive

Source: Ovum
The content lifecycle view

- Store
  - Create/Update
  - Capture
  - Take copy
- Classify as record
- Deliver copy
- Destroy
- Archive offline
Content mgmt and web publication

- Take copy
- Create/Update
- Capture
- Store
- Deliver copy
- Classify as record
- Destroy
- Archive offline

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Email management

- Take copy
- Create/Update
- Capture
- Store
- Classify as record
- Deliver copy
- Destroy
-Archive offline
The new information management landscape
The evolution of information management strategies

Need for information management infrastructure
An enterprise architecture framework

- Vision, strategy, policy
- Environmental/legal constraints

- Representing business drivers in information terms
- Mapping information requirements to information management solutions

- Defining core business processes
- Mapping business processes to application solutions

- Technical architecture
  - Access Infrastructure
  - Process Infrastructure
  - Service Infrastructure

- Business strategy
  - Process Models
  - Information & Knowledge Models
  - Application Architecture
  - Information Management Architecture
Process and information models are the core of the language and “signposts” used by business and IT to communicate. Mapping IT assets to process/information models shows where technology and business are not aligned, and how to fix things.
Promoting communication and interaction

- Business process and operations
- Application services
- Technical infrastructure
- Information and knowledge assets
- Information management services

- Enables
- Implements
- Specifies requirements for
- Integrates with
- Specifications
- Composed of
- Supports
- Utilizes
- Uses/nurtures
- Feeds
- Informs and optimizes
- Informs
- Enhances
- Supports
- Utilizes
Reframing the question: an example

- Business strategy
- Information and knowledge assets
  - Guiding principles on openness
- Information access and management guidelines
  - New audit and access requirements
- Information management architecture
  - Integrated view of relevant information assets
- Technical architecture
- Application architecture
  - New workflows for information handling
  - New information requests
- Business processes and operations
  - Current volumes and access controls
- Approved technologies and solutions
- Freedom of Information legislation
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

For more information see: www.ovum.com