

## A Sell-Side Product Information Management Vendor Landscape

*by Rob Bois, Eric Newmark, and Jim Murphy*

2005 marked a flurry of activity both in vendor consolidation and new PIM implementations, particularly in the CP industry. As a result of data synchronization mandates, manufacturer and distributor sell-side initiatives drove the majority of software purchases. Now that many companies have completed tactical data synchronization projects, longer term strategic PIM implementation initiatives will surface in.

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# A Sell-Side Product Information Management Vendor Landscape

by Rob Bois, Eric Newmark, and Jim Murphy

Companies evaluating standalone PIM offerings versus evolving enterprise application suites should weigh short-term tactics against the benefits of a longer term PIM vision.

## The Bottom Line

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### Executive Summary

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#### **Business Problem: Ignoring PIM today will only compound the problem later**

Data synchronization, the latest business driver for deploying Product Information Management (PIM), reveals that fragmented and incomplete product data is again a critical barrier. Forward-thinking enterprises are evaluating broader Master Data Management (MDM) strategies, but phase one begins with customer-facing product information.

#### **Market Overview: As consolidation slows, vendors concentrate on integration, execution, and the future of PIM**

Both infrastructure and application vendors have driven the recent consolidation in the PIM market. Several groups of vendors are pulling PIM in different directions, but the market will inevitably gravitate toward the emerging applistructure category.

#### **Vendor Comparison: Ownership philosophy, industry expertise, syndication, and analytics are key differentiators**

Most vendors offer core PIM functionality today, but manufacturers and distributors must decide whether to implement specialty products now or give incumbent vendors time to catch up.

#### **Recommendations**

- Build a long-term PIM roadmap that addresses today's tactical issues.
  - Expect SAP and Oracle to catch up within 12 to 18 months.
  - If you have to move now, go with a specialty vendor.
  - Software can help, but keep data cleansing in-house.
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#### **Vendors featured in this Report:**

Cardonet  
Comergent  
Flow Systems  
FullTilt Solutions  
Global eXchange Services  
i2 Technologies  
IBM  
Liaison Technologies  
Riversand  
SAP  
Stibo Catalog  
Velosel

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## Glossary of Terms

**Product Information Management**—PIM is a software product category and enterprise initiative for collecting, authoring, rationalizing, and publishing or syndicating product information across multiple internal systems and exposing product information externally. PIM includes tools for managing workflows, user permissions, and other controls to direct processes related to the product information. PIM typically takes product information from multiple internal systems and augments it with additional marketing and branding attributes that other enterprise applications don't capture. Many companies today implement PIM to facilitate data synchronization, but this is just one of many drivers for product syndication.

**Sell-Side PIM**—Sell-side PIM refers specifically to PIM for the purpose of selling as opposed to acquiring or procuring products.

**Master Data Management**—MDM is a strategy or framework for centralized rationalization, cleansing, and management of supplier, product, asset, customer, and employee information across an enterprise. MDM involves methods similar to those in PIM, but includes more information types beyond just product data.

**Data Pool**—A data pool is a B2B trading hub typically hosted by a third party such as UCCnet, Transora, or WWRE. A data pool has a standardized item catalog where suppliers and buyers can synchronize product, trading partner, geographical, and other information to facilitate a common set of products, nomenclature, and processes for commerce.

**Data Synchronization**—Data synchronization, or "data synch" as it is often called, generically is the process where a buyer or seller formats and transfers product information, typically via Extensible Markup Language (XML) documents, to and from a data pool for the purposes of conducting B2B commerce. Commonly, data synchronization refers specifically to synchronization to UCCnet within the Consumer Goods and Retail supply chain, but more generically the term applies to this process within any supply chains connected through a data pool.

**Global Data Synchronization Network (GDSN)**—According to UCCnet, the official definition of GDSN is "a network of interoperable data pools and a Global Registry, the GS1 Global Registry, for communicating master data (Catalogue Item and Party) between trading partners."

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## Business Problem: Ignoring PIM today will only compound the problem later

Companies that react now and build a pragmatic PIM system will dramatically increase their agility for deploying future product-related initiatives such as dynamic catalog generation, multichannel product syndication, or more effective print catalog creation. For example, one process manufacturing company deployed a PIM system to help generate regular custom electronic catalogs for external channels, allowing one business unit to build a \$70M B2B channel it could not have supported with fragmented product information. Although still an early business driver, Radio Frequency Identification (RFID) will generate a multitude of additional product and attribute data that discrete product data repositories will not sustain. As e-commerce standards continue to evolve, and the balance of power between buyers and sellers oscillates, the agile company with a sound PIM strategy will enjoy a significant competitive advantage.

The problem definition is relatively straightforward, but the solution is complex. Companies are fast realizing that product information in existing enterprise applications such as Enterprise Resource Planning (ERP) and Product Document Management (PDM) is fine for internal consumption, but incomplete, fragmented, highly distributed, and often redundant from a customer-facing perspective. Mergers and acquisitions have created manifold business units often with disparate systems that record redundant product attributes. This further increases the complexity of product information rationalization. Of the companies surveyed in this research, the average PIM system is combining product attributes from between 5 and 6 different sources, with some companies connecting up to 25 systems.

## Market Overview: As consolidation slows, vendors concentrate on integration, execution, and the future of PIM

Software vendors from several different categories have developed or acquired sell-side PIM functionality. SAP's acquisition of **A2i** and **IBM's** acquisition of **Trigo** signaled the strategic importance of PIM and the big vendors' desire for a piece of the pie. The vendors in this Report bring various heritages and approaches to the problem. However, the real issue is whether PIM ultimately aligns with infrastructure—merging with data management, workflow, and integration, or with the application stack as an extension of ERP and Product Lifecycle Management (PLM). Several tracks will coexist for the next few years, but a convergence toward applistructure will take hold in the long run.

To date, many vendor selections have been launched with tactical, immediate-term data synchronization needs in mind. Vendor viability has not been weighted as heavily as functionality since basic publication to data pools has been the highest priority. However, the next wave of growth in the PIM market lies in broader, more strategic deployments, and software buyers are more reluctant to hand over all their product data to a product from a vendor with questionable viability.

The small, private PIM vendors have already begun to specialize in a specific set of business processes or specialized industry segments to avoid being forced to compete on price once the large vendors catch up. With consolidation in the market nearing completion, the surviving PIM vendors will continue to solidify longer term visions for PIM and MDM and build messaging more around strategic information and data management for competitive differentiation rather than mandate compliance.

## **Vendor Comparison: Ownership philosophy, industry expertise, syndication, and analytics are key differentiators**

### **Data management philosophy separates the vendors**

The approaches the vendors take toward PIM differ fundamentally. PIM by necessity has distinct elements of infrastructure, such as data integration, management, analytics, and workflow, as well as application components such as attribute management, catalog syndication, and workflow.

**Table 1:** PIM product functions for selected PIM vendors

Vendor	Product Information Creation	Data Cleansing Tools and Expertise	Product Information Aggregation and Maintenance	Product Information Syndication and Publication	Workflow	Multi-language	Analytics and Reporting
Cardonet							
Comergent							
Flow Systems							
FullTilt							
GXS							
i2							
IBM							
Liaison Technologies							
Riversand							
SAP							
Stibo Catalog							
Velosel							

Source: AMR Research, 2005

Full functionality	
Supplied via partnership	
Limited	
None	

The vendors, due both to pedigree and strategy, tend to align with application-centric, infrastructure-centric, or a hybrid applistructure approach to PIM. The large enterprise application vendors like SAP and Oracle view their enterprise suites as the aggregation point for all product information, and will eventually add supplier, asset, customer, and employee data to the list. IBM and the managed network vendors like **GXS** take more of an infrastructure approach by applying an application-neutral product data hub to the problem. The standalone PIM vendors tend to have elements of both, although heritage often directs these vendors in one direction or the other.

As time goes on and software roadmaps unfold, all three camps will begin to converge and marshal PIM to the front lines of the emerging applistructure battle (see the AMR Research *Outlook* “Applistructure: The Next Big or Bust Thing for Enterprise Applications?” January 3, 2005). Vendors that resist this natural evolution will struggle in the long run. PIM as pure infrastructure lacks the business context and rich user interface required for broad business adoption, and application-centric vendors will struggle with true application agnosticism and tomorrow’s higher scalability demands. Appendix A features AMR Research’s methodology for defining the market and selecting the vendors discussed in this Report.

**Table 2:** Product, sales, and service information for selected PIM vendors

Vendor	PIM Product(s)	Approach to PIM*	Average Cost (License Only)**	Percentage of Services to License Cost***	Pricing Model
FullTilt	Fulltilt Perfect Product Suite, Fulltilt Business Process Management System	S	\$\$	20%	License cost varies by vertical, customer type, number of SKUs and custom modules
GXS	Product Information Manager Supplier Edition, Product Information Manager Retailer Edition, and PIM Express SMB Edition	I	\$	100%	Either as a perpetual license or a hosted application service
i2	i2 Master Data Management	A	\$\$-\$\$\$	150%	Per server as well as business process-based pricing component
IBM	WebSphere Product Center, Global Data Synchronization	I	\$\$-\$\$\$	100%	License only (combination of CPU and user licenses)
Liaison Technologies	Enterprise Content Director Suite (Includes Content Director, Web Content Director) and Content Director, UCCnet Services Edition	S	\$\$	150%	Subscription
Riversand	Riversand Content Center	S	\$\$	150%	License only
SAP	SAP NetWeaver MDM (SAP MDM and SAP MDME)	A/I	\$\$-\$\$\$	Undisclosed	SAP NetWeaver engine pricing
Stibo	Stibo Catalog	S	\$\$\$	50%-80%	License is based on the number of servers and users
Velosel	Velosel5	S	\$\$\$	50%	Value based

Source: AMR Research, 2005

\* **I** - Infrastructure, **A** - Application, **S** - Standalone PIM  
 \*\* **\$** - Under \$250K, **\$\$** - \$250K-\$499K, **\$\$\$** - \$500M-\$749M  
 \*\*\* **100%** = 1:1, **200%** = 2:1



## Vendors tend to specialize in specific industries

Because most of the original technology was developed by specialized software companies, most of the vendors have roots in particular industry segments. Although most PIM functions apply across industry, certain features such as data pool support, specific product attributes, and standards vary industry to industry. Data cleansing engagements are even more specialized by industry and require deep product expertise and greater demands on internal resources.

**Table 3:** Industry expertise and size of selected PIM vendors

PIM Vendor	Industry Expertise					
	Automotive	Consumer Products	High-Tech Manufacturing	Industrial Manufacturing	Process Manufacturing	Retail
Cardonet		√		√	√	√
Comergent	√	√	√			
Flow Systems			√	√	√	
FullTilt		√	√	√		
GXS		√		√	√	√
i2	√	√	√			√
IBM		√	√	√		√
Liaison Technologies		√			√	
Riversand			√	√	√	
SAP	√		√	√		√
Stibo Catalog	√	√			√	
Velosel		√				√

Source: AMR Research, 2005

**Table 3:** Industry expertise and size of selected PIM vendors (continued)

PIM Vendor	Data Pool Support	Customers	Organization
Cardonet	UCCnet	1-25	Small
Comergent	UCCnet, AAIA, IDEA, ECCnet, HDX	1-25	Midsize
Flow Systems	Flow Systems supplies generic data pool support through standardized data exchange formats such as XML	1-25	Small
FullTilt	IDEA, GHX, Transora, UCCnet, WWRE	1-25	Small
GXS	GXS Data Pool, Transora, WWRE, and UCCnet	25-49	Large
i2	UCCNet, WWRE and Transora	1-25	Large
IBM	Transora, UCCnet, SINFOS, WWRE, EANnet.fr	50-100	Large
Liaison Technologies	UCCnet, Ariba, ChemConnect	50-100	Small
Riversand	UCCnet	1-25	Small
SAP	UCCNet, Transora	1-25	Large
Stibo Catalog	None	25-49	Midsize
Velosel	UUUnet, WWRE, Transora	1-25	Small

**Small** 24 or fewer  
**Midsize** 25-49  
**Large** 50+

Source: AMR Research, 2005

## Product features are comparable, but vendors take differing approaches to analytics

Virtually all the sell-side oriented PIM products include core capabilities for assisting enterprises to author, manage, and publish detailed product information for consumption by their customers. Most also include a graphical interface for manipulating product information, tools for defining and enforcing product management workflow, and some basic analytics and data cleansing tools and services. As a whole, the PIM vendors will primarily address enhancements to user interfaces and additional multi-language support in future releases.

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### Product and vendor summaries

Please refer to Appendix A for a review of vendors and their products in this market. Appendix B features AMR Research's methodology for defining the selection criteria for the vendors discussed in this Report.

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## Recommendations

AMR Research has long recommended that enterprises consider data synchronization as part of a broader strategic PIM initiative (see the *AMR Research Report* “Data Synchronization Has Simply Become a Cost of Doing Business,” April 2003). Business drivers for PIM are now shifting from tactical to strategic, so vendor selection processes should account for this shift.

- **Build a long-term PIM roadmap that addresses today’s tactical issues.** Although data synchronization has been a priority, it is not the means to an end. Many users surveyed for this research indicated their PIM vendor was selected primarily on features specific to data synchronization, and not longer term strategic PIM. Many indicated a willingness to evaluate other vendors over the next year or two as their PIM needs expand beyond just data synchronization facilitation. Be aware that a broad strategic PIM rollout often takes between five to seven years to do properly (see the upcoming AMR Research PIM decision advisory Report for detailed strategic advice on building a strategic PIM roadmap).
- **Expect SAP and Oracle to catch up within 12 to 18 months.** Even if your incumbent application vendor hasn’t fully fleshed out its PIM roadmap, unless data synchronization is an immediate business driver, it may make sense to wait. The ERP vendors will have their PIM offerings in place over the next year, and will have competitive functionality and a good, long-term MDM roadmap. Similarly, on the infrastructure side, IBM and GXS customers should look to those vendors especially if they have multiple incumbent ERP vendors.
- **If you have to move now, go with a specialty vendor.** Companies seeking to satisfy customer mandates or build an immediate competitive advantage should evaluate a specialty PIM vendor. These vendors have more stable products today and the implementation experience to make a successful and efficient deployment.
- **Software can help, but keep data cleansing in-house.** Product data cleansing and normalization often accounts for up to 70% of a total PIM project. Nearly all user references indicated that they under-budgeted both the time and resources dedicated to this phase. Overwhelmingly, the most successful enterprises relied heavily on internal resources often along with tools from vendors such as **UDEX** and **Silver Creek** for this process rather than outsourcing entirely to a third party. Internal product experts with a deep understanding of both the product attributes and their use by the business are critical resources in this stage.

## Appendix A: PIM vendors

### Cardonet

Cardonet is privately funded and has raised \$24.5M in private equity since inception in 1997. The company is not yet profitable, but is aggressively moving toward positive cash flow. The company exclusively sells PIM software, all of which has been organically grown. It sells PIM across industries, with implementations evenly disbursed across Discrete Manufacturing and Consumer Products (CP). The company targets both medium and large enterprises, and sells largely within North America.

Cardonet sells *Cardonet Synergy* to address PIM. Cardonet has been involved in product content management and related areas since its inception, and is now on version 6.1 of *Synergy*. The product is workflow oriented at its foundation, providing state management through product information authoring, management, and syndication. *Synergy* provides a number of built-in reports relative both to product status, as well as internal workflow and state management for in-progress information authoring. Cardonet sells largely within North America and only supports integration to UCCnet. *Synergy* does support localization, but with limited live multilanguage implementations. Cardonet sells PIM through a licensed behind-the-firewall software model.

### Comergent

Comergent is privately held and reports to be operating at near cash-flow neutral levels. The company expects to be profitable by mid-2005. The company concentrates on software products addressing PIM, configuration, pricing, quoting, and order management in addition to a set of platforms and tools. Comergent primarily caters to the High-Tech Manufacturing, Automotive, Transportation, Consumer Goods, and Distribution industries. It targets both medium and large enterprises and sells primarily in North America.

Comergent sells PIM functions through *Comergent C3 Product Depot*, but also sells optional modules such as *C3 Catalog*, *C3 Pricing*, *C3 Promotions*, *C3 Document Capture*, and *C3 Advanced Messaging* for extended PIM features. *C3 Product Depot* is the fruit of Comergent's January 2004 acquisition of **Profile Systems**, which formerly sold the product as *Master Depot*. Comergent provides product information authoring, management, and syndication and finds success selling PIM as an element of its broader sell-side commerce suite as well as standalone PIM implementations. The company supports UCCnet, AAIA, IDEA, ECCnet, and HDX. Comergent sells its suite as either a licensed behind-the-firewall product or a hosted application.

## Flow Systems

Flow Systems is wholly owned by Mediagrif, a public company traded on the Toronto Stock Exchange reporting revenue exceeding \$50M in 2004. The company first introduced *Flow Content Factory* in 1998 and now has 22 live customers. 43% of its customer base resides in Chemical and Machinery, although it also touches several other industries, including Pharmaceuticals, Education, Electronics, Computer Equipment, and Office Supplies. The company primarily sells to companies with revenue under \$1B, and all of its customers are located in North America.

While Flow Systems' heritage is in catalog management, during the past two years the company branched out to include promotion management, versioning, and enhanced syndication. The PIM product, *Flow Content Factory*, sits at the heart of the *Retail Promotion* and *Catalog Management* suites. The product is 100% customer facing and is delivered both as a licensed behind-the-firewall product and a hosted application. *Flow Content Factory* enables the creation, aggregation, and syndication of product data and comes prepackaged with integration points to Adobe *InDesign* and *QuarkXpress*.

## FullTilt Solutions

FullTilt Solutions is a private company and does not disclose revenue, but it closed its last round of financing in 2000 for \$22M. The company targets enterprises with large product databases and high transaction volumes. FullTilt has about a dozen customers in production in industries including Food and Beverage, Consumer Goods, High-Tech, Machinery, Medical Technology, and Distribution. The majority of customers are large enterprises, but FullTilt also sells about 35% in the Small and Midsize Business (SMB) segment. FullTilt sells exclusively in North America.

FullTilt's PIM product, *Perfect Product Suite*, supports product information authoring and syndication, but is specifically built for automating high volumes of data aggregation, cleansing, and categorization. The company also offers its *Business Process Management System* as a separate add-on workflow tool. The product supports integration to IDEA, GHX, Transora, UCCnet, and WWRE.

## GXS

GXS or Global eXchange Services was acquired from General Electric where it was known as **GE Information Systems**, and taken private by Francisco Partners in 2004. Francisco Partners has also agreed to acquire **G International**, a business established to own and operate IBM's Electronic Data Interchange (EDI) and Business Exchange Services (BES) businesses. With the closure of the IBM acquisition, combined revenue will be approximately \$450M for calendar 2004, with both companies enjoying positive operating income. In addition to PIM, GXS sells B2B integration, data pool management, order management and logistics visibility, and order management software. The company sells PIM predominantly into the CP, Retail, Food and Beverage, and Chemical industries in addition to High-Tech and Automotive from a company-wide perspective. It targets both midsize and large enterprises primarily in North America, Europe, and Asia-Pacific.

GXS offers three products relating to PIM: *Product Information Manager Supplier Edition*, *Product Information Manager Retailer Edition*, and *Product Information Manager Express Supplier Edition*. The company's PIM functionality is derived from tools acquired from **HAHT Commerce** in 2004, and serves both buy-side and sell-side PIM. GXS provides all three phases of product information: creation, aggregation, and syndication. Item and trading partner analytics are provided, and may be augmented with an additional Business Intelligence (BI) software package. GXS supports integration to its own GXS Data Pool, Transora, WWRE, and UCCnet. GXS sells PIM as a licensed behind-the-firewall product, as well as in a hosted application service model.

## i2 Technologies

i2 Technologies, a public company, reported \$389M in total revenue and \$58.6M in license revenue for 2004, although a net loss of \$3M. While the company's legacy lies in supply chain management, i2 acquired **Aspect Development** in 2000 to enhance its content management platform and later released *i2 Master Data Management* in 2003. The company yields the bulk of its business from the Retail, CP, High-Tech, and Automotive industries, and primarily sells to large enterprises in North America, Europe, and Asia-Pacific.

i2 Technologies' *i2 Master Data Management* is a Web-based software tool designed to aid data authoring, synchronization, monitoring, and maintenance processes. The tool is available both as a standalone application and as part of the company's *Supply Chain Operating Services (SCOS)* infrastructure platform. The product addresses all three phases of PIM: creation, aggregation, and syndication. i2 also offers a data auditing and cleansing service, typically three to five weeks in length, to aid customers in identifying any existing data structure problems prior to product implementation. The product comes with prepackaged integration to UCCnet, Transora, and WWRE.

## IBM

IBM is a public company and generated \$14.3B in software revenue from 2003, but does not disclose revenue for individual software categories. IBM is also already working PIM into a broader MDM strategy, with product information as just one data element of many. The company also is working on tighter integration between *IBM WebSphere Commerce Center* and on tying in its RFID strategy. The acquisition of Trigo was the first major one in the PIM space and established IBM as the first of the heavyweights to make a substantial financial investment in this market. PIM is really part infrastructure and part application, so with the *WebSphere* group's infrastructure orientation, a bit of an identity adjustment is required. IBM's software group sells to large and midsize businesses across virtually all industries with a large, global presence.

IBM's PIM strategy includes two products: *WebSphere Product Center* and *Global Data Synchronization*. *WebSphere Product Center*, which is the product acquired from the company's April 2004 acquisition of Trigo, handles the bulk of PIM functionality, including product information authoring, management, and syndication. *Global Data Synchronization* syndicates to CP and Retail data pools including Transora, UCCnet, SINFOS, WWRE, and EANnet.fr. IBM predominantly sells its PIM products as licensed software that resides behind the firewall, but also offers outsourcing and hosted services. At the time of the acquisition, Trigo oriented its product mostly toward large companies in CP, Electronics, Industrial Manufacturing, Distribution and Retail, but IBM will likely broaden to include other product-data intensive industries such as Life Sciences, Automotive, and Financial Services.

## Liaison Technologies

Liaison Technologies is a private company and does not disclose revenue. The company is not yet profitable, but is targeting the fourth quarter of 2005 for breakeven operation. Liaison was originally founded as Forrest Express by equity partners in the Paper and Pulp industries including International Paper, Weyerhaeuser, MeadWestvaco, Georgia-Pacific, and Boise Cascade. The company acquired Liaison Technologies in April 2002 for its PIM products, and rebranded the entire company under that moniker in 2004. Based on its strong heritage in the Wood and Paper industry, Liaison still generates nearly 80% of its revenue from that segment, but plans to broaden its industry expertise starting with Pharmaceuticals. The company targets primarily large enterprises and sells only in North America.

Liaison sells *Enterprise Content Director Suite*, *Content Director*, and *UCCnet Services Edition* to address PIM. Liaison's PIM functionality is derived from tools originally built for Web product content management, but handles product information creation, aggregation, and syndication. The company supports integration to UCCnet, Ariba, ChemConnect, IntelliTrans, Nextier, and Nistevo. The products provide HTML reporting natively, and support data export to third-party analytic tools including *Crystal Reports*, SAP, *Microsoft Excel*, and *Panscopie*. Liaison is the only company in this Report that sells its PIM product exclusively via a hosted model.

## Riversand

Riversand is a private company and does not disclose revenue, but does report profitable operations. The company has exclusively sold PIM software since its inception in 2001. Riversand has enjoyed most of its success selling to industries that manufacture complex electronics and machinery, as well as the Healthcare industry, and targets only large enterprises in North America.

Riversand sells the *Riversand ContentCenter* platform in two versions: *PIM for Buyers* and *PIM for Suppliers*. The company's PIM functionality was organically developed originally under the product content management moniker and then evolved into the current *ContentCenter* to handle product information authoring, management, and syndication. A number of standard reports are available within the product as well as a business process management and workflow module. Riversand takes an industry-oriented approach to PIM by addressing the specialized needs of complex manufacturing such as Industrial Machinery, High-Tech, Oil and Gas, and Pharmaceuticals, rather than the more traditional CP industry fueled by retailer mandates. The company sells a licensed behind-the-firewall product, but plans to offer a hosted version targeted at the SMB segment.

## SAP

SAP's 2004 revenue is estimated to be approximately \$10B. It sells primarily through direct channels, with some business through distributors, value-added resellers, application service providers, and service providers. The company is headquartered in Walldorf, Germany, and boasts 88,000 installations worldwide. SAP sells across a broad range of industries in Discrete and Process Manufacturing and Services.

SAP plans to address PIM via the broader *SAP MDM* product family. In July 2004, SAP acquired A2i, a 10-year veteran of product content management, to enhance its original *SAP MDM* PIM product. The company is integrating A2i's *xCat* suite as *SAP Master Data Management Extension (SAP MDME)*, which will also be offered as a component of the *SAP NetWeaver MDM* platform. Although the final integrated product is not released, *xCat* supports enterprise-level product content management, data harmonization, and Web-based e-catalogs for both sell-side and buy-side deployments. *SAP MDME* is planned to also include more complex data normalization, high performance search, and print publishing. SAP is scheduled to have significant integration completed this year, with complete integration finalized later in 2006. *SAP MDM* is offered as a licensed behind-the-firewall application and supports integration to UCCnet and Transora.



## Stibo Catalog

Stibo Catalog is a profitable, privately held company. The company doesn't share revenue numbers, but 80% of its revenue comes from *STEP*, predominantly in North America and Europe, the Middle East, and Africa (EMEA). Stibo Catalog sells predominantly to large enterprises and SMBs, but has some distribution even within small companies. Stibo Catalog's strongest industry is Wholesale and Distribution, but has a significant customer base in Process Manufacturing, Discrete Manufacturing, Automotive, and Pharmaceutical/Biotech as well.

Stibo Catalog, part of the Stibo A/S Group, has a 29-year history in catalog management. Today, the company offers *STEP* as its PIM product. *STEP* brings aggregation, management, and publication capabilities to its existing catalog expertise. *STEP* is available in both a hosted and licensed behind-the-firewall product, and supports both single- and double-byte languages. Workflow capabilities are also offered via an Original Equipment Manufacturer (OEM) relationship with **TIBCO**. Customers seeking to syndicate with data pools or exchanges can do so through the *STEPTrade* module, or third-party products from vendors such as IBM.

## Velosel

One of the last independent pure-play PIM vendors, Velosel is a privately held corporation and does not disclose financial information. The company specifically targets five verticals: Food and Beverage, CPG, Hardlines, Consumer HealthCare, and Retail. Velosel secures the majority of its business from companies with over \$1B in revenue. The bulk of its business is in North America, with a small percentage in EMEA and Asia-Pacific.

Velosel was one of the early vendors in the data syndication market, formed in 2001 when **HubStorm** and **Martquest** merged and combined their *eSupplier* and *eChannel-Manager* applications, respectively. *Velosel5* is the latest product release, which includes PIM functions such as repository management, workflow, and syndication. The product, which is available through both a licensed and hosted model, comes with standard integration to UCCnet, Transora, and WWRE, and supports unlimited taxonomies.

## Appendix B: Vendor landscape methodology

This Report surveyed vendors that sell generally available software products specifically for sell-side PIM. For the purposes of this Report, a PIM product was defined as those that help enterprises create, aggregate, and publish or syndicate detailed product information. To be included in this Report, each vendor had to demonstrate product that directly addresses these capabilities, and is in production with at least one customer that is using the product to expose product information to its customers. This Report targeted software vendors that serve large enterprises, rather than companies that exclusively serve the midmarket. AMR Research defines large enterprises as companies with \$1B or more in annual revenue. We also surveyed approximately 20 users of PIM software across industries including Consumer Goods, High-Tech, Oil and Gas, Wood and Paper, and Industrial Manufacturing.

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## Company List

Cardonet	<a href="http://www.cardonet.com">www.cardonet.com</a>
Comergent	<a href="http://www.comergent.com">www.comergent.com</a>
Flow Systems	<a href="http://www.flowsystems.com">www.flowsystems.com</a>
FullTilt Solutions	<a href="http://www.fulltilt.com">www.fulltilt.com</a>
GXS	<a href="http://www.gxs.com">www.gxs.com</a>
i2 Technologies	<a href="http://www.i2.com">www.i2.com</a>
IBM	<a href="http://www.ibm.com">www.ibm.com</a>
Liaison Technologies	<a href="http://www.liaison.com">www.liaison.com</a>
Oracle	<a href="http://www.oracle.com">www.oracle.com</a>
Riversand	<a href="http://www.riversand.com">www.riversand.com</a>
SAP	<a href="http://www.sap.com">www.sap.com</a>
Silver Creek Systems	<a href="http://www.silvercreeksystems.com">www.silvercreeksystems.com</a>
Stibo Catalog	<a href="http://www.stibocatalog.com">www.stibocatalog.com</a>
TIBCO	<a href="http://www.tibco.com">www.tibco.com</a>
UDEX	<a href="http://www.udex.com">www.udex.com</a>
Velosel	<a href="http://www.velosel.com">www.velosel.com</a>

# Acronyms and Abbreviations

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BI	Business Intelligence
CEM	Consumer Electronics Manufacturing
CP	Consumer Products
EMEA	Europe, the Middle East, and Africa
ERP	Enterprise Resource Planning
GDSN	Global Data Synchronization Network
MDM	Master Data Management
OEM	Original Equipment Manufacturer
PDM	Product Document Management
PIM	Product Information Management
PLM	Product Lifecycle Management
RFID	Radio Frequency Identification
SMB	Small and Midsize Business
XML	Extensible Markup Language