

MARKET ANALYSIS

Asia/Pacific (Excluding Japan) Content Management Software Market, 2008–2012 Forecast and 2007 Market Sizing

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IDC OPINION

The content management (CM) market remains a fast growing but comparatively small market in Asia/Pacific (excluding Japan) or APEJ, with more organizations starting to evaluate CM as a solution rather than a point product. The CM market slightly outperformed IDC's estimates and grew by 22.29% to reach US\$181.82 million in 2007. The key highlights emerging from this study include:

- ☒ Despite a more uncertain global economic outlook and record high oil prices, the APEJ CM market is anticipated to continue growing steadily to reach US\$362.03 million by 2012 with a compound annual growth rate (CAGR) of 14.77%.
- ☒ Australia and Korea continued to be the main contributors to the CM software market, and are expected to maintain their positions throughout the forecast period. Meanwhile, India and the People's Republic of China (PRC) are expected to continue showing strong growth with CAGRs of 22.93% and 17.99%, respectively.
- ☒ The different economic, regulatory, and IT-maturity levels in each country contribute to varying levels of adoption and knowledge surrounding CM software in the APEJ region. Compliance mandates, such as the Sarbanes-Oxley Act (SOX) and Basel II, remain and will continue to be one of the primary factors driving growth in the APEJ CM software market throughout the forecast period.
- ☒ Many APEJ countries have prioritized e-government and have either set, or are in the process of setting, higher-standards level requirements for record keeping. Requirements include aspects like maintenance of full and accurate records, accessibility and non-disposability of records without authority are expected to continue driving CM adoption. At the same time, IDC research indicates that workflow-enabled CM and the automation of paper-based and document-based business processes are gaining interest from organizations that are focusing on improving operational efficiencies.

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IN THIS STUDY

This IDC study provides a sizing of the APEJ CM software market in 2007 as well as a forecast for 2008–2012. Historical and forecast revenue data is shown for the total APEJ market and by country. Also included are the market shares of the top 10 vendors for the region and the top 5 vendors for the 10 largest country markets for CM software in APEJ. This study also provides the profiles of leading vendors, and gives guidance for vendors that are seeking to successfully expand their footprint in the region.

Methodology

The data presented in this study represent IDC's best estimates and projections based on the following:

- ☒ Reported and observed trends and financial activities as of the end of December 2007, including reported revenue data of public companies trading on various stock exchanges where available
- ☒ Interviews with key vendors in the market, where available
- ☒ Ground-level feedback on the market sizing, forecasts, and vendor performances by IDC analysts in every APEJ country, where available
- ☒ Modeling to fill in any information gap using a top-down/market-level approach to estimate the overall 2007 market sizing
- ☒ Product briefings, press releases, and other publicly available information (IDC software analysts meet regularly with hundreds of software vendors, and these briefings provide an opportunity to review current and future product strategies, revenue, shipments, customer bases, target markets, and other key product information)

Notes:

- ☒ *All numbers in this document may not be exact due to rounding.*
- ☒ *For more information on IDC's software definitions and methodology, see IDC's Software Taxonomy, 2008 (IDC #210828, February 2008).*

Content Management Software Market Definition

CM software builds, organizes, manages, and stores collections of digital works in any medium or format. The software in this market includes document management, Web CM, capture and image management, digital asset management, and electronic records management. CM forms the foundation or the infrastructure for knowledge management.

- Applications in this market include one or more of the following functions:
- Gathering and feeding documents and other media into collections via crawlers or other automated and/or manual means and performing metadata capture/enrichment, formatting, transformations, and/or conversion operations
- Organizing and maintaining information, including some or all of the following:
 - Indexing, cataloging, and/or categorizing information in the CM system
 - Building directories
 - Defining workflows for tracking documents and changes and sending alerts when action is required
 - Record keeping, auditing, and logging
 - Updating and purging content
 - Searching for information in the CM system (embedded tools may be provided)
- Ensuring document security by managing rights and permissions to create, edit, post, or delete materials; managing user access; and protecting intellectual property (IP)

SITUATION OVERVIEW

The CM software market in the APEJ region grew by 22.29% to reach US\$181.82 million, with almost every country in the region registering double-digit growth rates in 2007. The CM market is expected to reach US\$362.03 million by 2012 with a CAGR of 14.77%. The mature markets of Australia and Korea continued to be the main contributors to the CM software market; followed by the PRC and India, which are looking promising for the coming years as well.

There are many factors that collectively contributed to the growth in 2007. Strategic relationships built with partners and channels helped vendors to increase their presence across the region. Also, the mandates from government for tracking and storing electronic documents and images fueled the demand for CM. While the largest industry adopters remained the financial service industries and the government sectors, verticals like oil and gas, manufacturing and construction and infrastructure services have begun to explore and adopt CM solutions. Overall, there is more awareness in the market through the conduct of road shows and partner and customer summits, which is a positive sign for the expansion of the CM market.

The different economic, regulatory, and IT-maturity levels in each country contribute to varying levels of adoption and knowledge surrounding CM software in the APEJ region. Compliance mandates such as the SOX and Basel II remain, and will continue to be, the primary factors driving growth in the APEJ CM software market throughout the forecast period.

Along with that, e-governance initiatives are also taking speed. Many APEJ countries have already made e-government their priority project, with Australia, Hong Kong, and Singapore emerging as global leaders in e-government initiatives. Governments across the rest of Asia/Pacific have also been actively adopting Internet-based technologies as part of their ongoing efforts to develop their own e-governments. These include reaching out to the public with up-to-date information on government portals and deploying records management, Web CM software solutions, as well as e-forms to increase efficiency. The Australasian Digital Recordkeeping Initiative (ADRI), an undertaking of the Council of Australasian Archives and Records Authorities, is the peak body of government archives and records institutions in Australia and New Zealand (ANZ), whose primary objective is to pool resources and expertise to find better ways to ensure that digital records are preserved and made accessible for the future. This is expected to contribute to the growth of CM in ANZ as it allows management of unstructured information by capturing, storing, and preserving electronic documents.

Governments are focusing on setting out high-level requirements for all public offices for record keeping that is increasingly being applied to Web sites and thus must be incorporated in the Web strategy. These requirements include creation and maintenance of full and accurate records, maintaining records in an accessible form and non-deletion, or otherwise disposal of any record without written authority.

CM solutions that define workflows for tracking documents and changes and send alerts when action is required are also gaining traction in the region. As organizations mature and expand, there tends to be more need for a solution to manage and track increasingly complex processes and procedures. Workflow-enabled CM is gaining interest from organizations that need to adhere to compliance and stringent government audits and to improve operational efficiencies.

The overall CM market in APEJ is evolving to a more complete end-to-end integrated market through vendors' acquisitions and internal product developments and enhancements. CM initiatives within banks are getting more prevalent through its increasing utilization and expansion into numerous lines of businesses (LOBs). In some cases, CM implementation has grown beyond department and business unit levels to enterprisewide utilization. Demand in APEJ is generally fueled by both the financial and government sectors; the former seeks to comply with Basel II, reduce costs, and to improve customer service levels, while the primary objective of the latter is to reduce costs as well as increase efficiency in order to provide better services to citizens. The legal industry in APEJ also contributed to the CM market growth as progressive law firms are turning to the best-of-breed solutions to support their growth, enhance efficiency, improve global competitiveness, and address regulatory compliance.

The consolidation trend continues in the CM software market as vendors seek to provide more complete and complementary CM solutions. For instance, Intervoven acquired Optimost in October 2007 while closer to home; HP acquired Australia-based Tower Software in March 2008 to expand its offerings in the fast-growing electronic discovery and compliance software market.

Given the amount of localization and often-unique workflows involved in some CM implementations, it is not surprising that the region's CM market is one with a number of homegrown vendors. Vendors that rank among the top 5 in their countries include: Tower Software in Australia, I-ON Communication and Cyberdime in Korea, and Newgen Software Technologies Ltd. in India. These vendors may face more challenges to continue growing in the face of an uncertain economic climate, since many lack the deeper resources of their global counterparts.

Table 1 provides the 2007 top 10 vendors in APEJ's CM market while Table 2 provides the CM market sizing and forecast for 2006–2012 by country.

TABLE 1

Asia/Pacific (Excluding Japan) Content Management Software Market
Top 10 Vendors, 2007 (US\$M)

	2007	Market Share (%)
IBM	33.48	18.42
EMC	28.70	15.79
Tower Software	14.75	8.11
Interwoven	9.69	5.33
Kofax	9.41	5.17
OpenText Corp	8.76	4.82
Microsoft Inc.	8.21	4.52
I-ON Communications	5.89	3.24
Vignette	5.84	3.21
Objective Corp. Ltd.	5.46	3.00
Others	51.63	28.40
Total	181.82	100.00

Notes:

- The data refers to software license, maintenance, and subscription/other software revenue only.
- See Table 3 for key forecast assumptions.

Source: IDC, 3Q08.1

FUTURE OUTLOOK

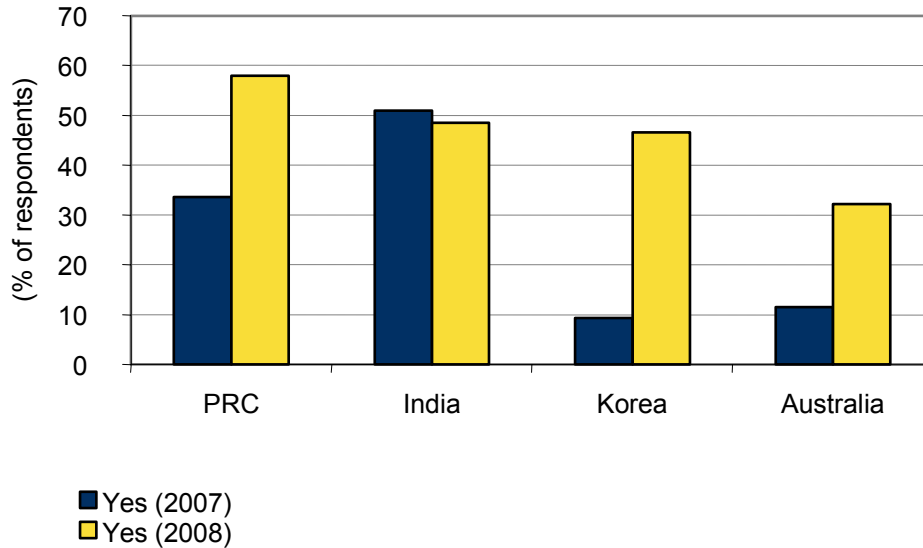
Forecast and Assumptions

Despite the uncertain global economic outlook and higher inflation expectations in many APEJ countries, the CM software market in this region is expected to enjoy a healthy CAGR of 14.77% to reach US\$362.03 million by 2012. Australia and Korea, being the most developed in their IT maturity, is expected to remain the largest CM markets in the APEJ region throughout the forecast period. India's CM market is expected to remain the fastest growing with a CAGR of 22.93%, driven by its strong economic environment and availability of SI capability.

An IDC end-user survey conducted in 1H08 (see Figure 1) indicates that more companies in the PRC and India intend to invest in CM software in 2008, compared with the more matured countries of Australia and Korea. This likely indicates that there are more organizations in Australia and Korea that have already adopted CM solutions in 2007 compared with those in India and PRC. This is in line with IDC's country market estimates. Respondents in India and the PRC may be keen to invest in CM solutions in 2008 due to increasing compliance requirements and to better optimize and automate paper-based business processes through CM capabilities, such as capture and image management solutions to better cater to the growing operations. It is also worthwhile to note that the general intention to invest in CM in the current year has increased in PRC, Korea, and Australia, with a higher "yes" response in these countries compared with those in last year's survey. This may indicate that CM has risen in priority among organizations in those countries, which bodes well for vendors in this market. Readers should note that the usual caveats of a survey applies and that intention to spend may not necessarily translate to actual adoption in the near future.

FIGURE 1

Comparison of the Intention to Invest in Content Management Software in 2007 and in 2008: Does your Organization Plan to Invest in Content Management Software?



Notes:

- Weighted N differs by country.
- IDC Software Exclusive Survey, 2008: India N = 436; PRC N = 434; Australia N = 109; Korea N = 108
- IDC Software Survey, 2007: India N = 401; PRC N = 403; Australia N = 100; Korea N = 100

Sources: IDC Software Exclusive Survey, 2008; IDC Software Survey, 2007

The market sizing and forecast for individual countries in the APEJ CM market are presented in Table 2. The 2006 market size has been revised slightly upward by US\$3.68 million (i.e., by 2.5%) when compared with the 2006 market sizing published in *Asia/Pacific (Excluding Japan) Content Management Software 2007–2011 Forecast: Market Sizing — Steady Growth, Rapid Consolidation* (IDC #AP322108P, July 2007). More details on this are provided in the market context section. The data presented in Table 2 is the result of observations and insights from IDC's country-based analysts, where available. The key forecast assumptions for the APEJ CM software market forecast is shown in Table 3; while Figure 2 is a graphical presentation of the country markets for 2007 and 2012.

TABLE 2

Asia/Pacific (Excluding Japan) Content Management Software Market Sizing and Forecast by Country, 2006–2012 (US\$M)

Country	2006	2007	2008	2009	2010	2011	2012	2007–2012 CAGR (%)
Australia	45.69	58.49	66.90	76.77	87.69	101.21	116.34	14.74
Hong Kong	4.39	4.93	5.50	6.16	6.92	7.81	8.85	12.41
India	14.03	17.65	21.36	25.75	32.00	39.82	49.55	22.93
Indonesia	0.65	0.72	0.82	0.93	1.07	1.23	1.43	14.79
Korea	36.40	41.96	47.36	52.90	58.58	63.40	68.57	10.32
Malaysia	4.24	5.14	6.07	7.22	8.66	10.48	12.68	19.79
New Zealand	5.24	6.76	7.60	8.58	9.69	10.97	12.33	12.78
Philippines	0.56	0.63	0.75	0.88	1.05	1.24	1.49	18.67
PRC	16.80	20.29	23.34	27.54	32.49	38.67	46.40	17.99
Singapore	11.72	14.23	16.15	18.39	20.81	23.45	26.69	13.40
Taiwan	6.39	8.06	8.74	9.51	10.32	11.21	12.19	8.62
Thailand	2.15	2.43	2.72	3.08	3.48	3.93	4.48	13.00
Vietnam	0.07	0.08	0.10	0.12	0.13	0.14	0.17	14.89
ROAPEJ	0.36	0.43	0.49	0.55	0.64	0.74	0.86	14.93
Grand total	148.68	181.82	207.90	238.36	273.53	314.31	362.03	14.77

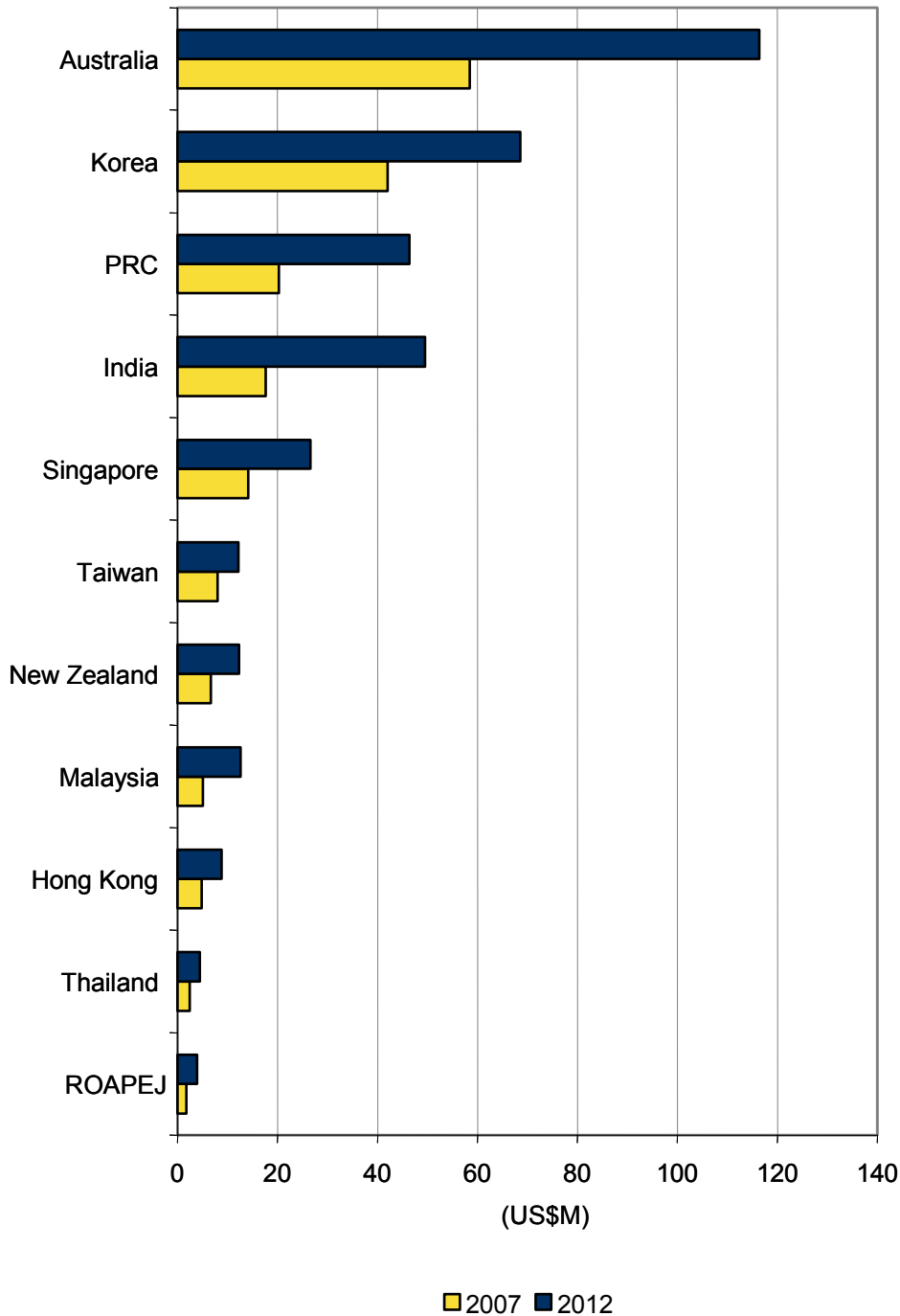
Notes:

- The data refers to software license, maintenance, and subscription/other software revenue only.
- See Table 3 for the key forecast assumptions.

Source: IDC, 3Q08.1

FIGURE 2

Content Management Market Revenue by Country,
2007 and 2012



Note: The data refers to software license, maintenance, and subscription/other software revenue only. ROAPEJ includes ROAPEJ, Indonesia, Vietnam, and the Philippines.

Source: IDC, 3Q08.1

TABLE 3

Key Forecast Assumptions for Asia/Pacific (Excluding Japan) Content Management Software Market 2008–2012

Market Force	IDC Assumption	Impact	Accelerator/ Inhibitor/ Neutral	Certainty of Assumption
Macroeconomics				
Australia: gross domestic product (GDP) growth	GDP growth continues to show resilience albeit slowing down from 3.9% in 2007 to 2.9% in 2008; as a result of a slowdown in domestic demand as well as high interest rates that appear to be hurting consumer and business confidences as well. Private investment growth, in contrast, will remain upbeat as PRC and India demand for raw materials drives interest in Australia's mining sector. Nonetheless, there will be a slight slowdown in investment growth as tighter credit conditions dampen appetite in other sectors.	Low. Although the economy might experience a slowdown in 2008, the IT market as a whole should maintain momentum. While consumer demand may be affected slightly due to inflation, the IT market generally should still remain robust.	↑	★★★★☆☆
India: GDP growth	India's economic boom is forecast to moderate over the next two years with GDP growth slowing from 8.7% in 2007 to 7.6% 2008. Although business confidence is high, financing costs and inflation rates are soaring. Nonetheless, the government has indicated its commitment to help ease inflationary pressures and lower import duties on non-food commodities.	High. Inflationary pressures have shaken up the forecast GDP. The government has initiated a range of fiscal measures, but an all-time high inflation is expected to be under control only by September, which hurts buying sentiment.	↑	★★★★☆☆
Korea: GDP growth	South Korea's GDP forecast will decline to 4.5% in 2008 from 4.9% in 2007. Despite healthy export growth, the strength of the Won and the increase in material costs will dampen the overall export performance. Meanwhile, the jump in the consumer price index tightens consumption power.	Moderate. Weak domestic consumption will be hard on the economy in 2008. However, since GDP growth is still under 5%, the impact on IT spending will be minimal.	↓	★★★★☆☆

TABLE 3

Key Forecast Assumptions for Asia/Pacific (Excluding Japan) Content Management Software Market 2008–2012

Market Force	IDC Assumption	Impact	Accelerator/ Inhibitor/ Neutral	Certainty of Assumption
PRC: GDP growth	Owing to the deteriorating outlook for the global economy, the forecast for real GDP growth this year is expected to stand at 9.8%, compared with 11.9% in 2007. Domestic consumption will remain firm, with accelerating government spending and demand in rural areas playing significant roles.	Moderate. IDC assumes that more effective measures taken by the government will help reduce the risk of economic overheating and thus have no major impact on most IT markets. The PRC government will continue to manage inflation in fields like raw materials. Recent efforts to smooth out public holiday periods could also help keep the economy stable.	↔	★★★★☆
Hong Kong: GDP growth	Despite the U.S. slowdown and concerns over the global outlook, the economic boom in Hong Kong is still going strong. A recession in the United States could have a deeper impact on Hong Kong but, at the moment, the U.S. slowdown is feeding through into lower interest rates. Hong Kong is expected to see real growth of 4.9% in 2008, led by surging private consumption.	High. With the economic situation stabilizing, corporations will be less conservative with IT expenditures. PC procurement for replacement projects should be found in both large business and small and medium-sized enterprise (SME) segments. Stable salaries help simulate consumer buying.	↑	★★★★☆
Indonesia: GDP growth	Despite strong domestic demand, Indonesia is expected to experience a dip in GDP growth in the next two years. This economic shortfall is the result of the overall slowdown in the global economy, as well as the political uncertainty of the 2009 parliamentary and presidential elections that will inevitably lead to weaker investments and consumer spending.	High. Indonesia will still experience positive growth, despite being not as strong as before. This is to likely continue until 3Q08. The commercial sector may increase IT budgets in big-scale projects, especially in the telecommunications and banking sectors. While high oil prices and inflation could affect the country's businesses, IDC expects that IT investments will continue given the need for IT.	↑	★★★★☆

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Key Forecast Assumptions for Asia/Pacific (Excluding Japan) Content Management Software Market 2008–2012

Market Force	IDC Assumption	Impact	Accelerator/ Inhibitor/ Neutral	Certainty of Assumption
Thailand: GDP growth	Despite ongoing concerns over political stability, the formation of a democratically elected government in early 2008 has provided some grounds for an increase in confidence. This has helped to stimulate private consumption and investment, pushing growth up. The next government is likely to run a stimulatory fiscal policy that will ensure continued strong public consumption growth. Public investment growth will also be buoyant, boosted by spending on infrastructure development projects.	High. With the increased confidence in the political system within the country, businesses will be more forthcoming in moving ahead infrastructure developments, thus increasing spending on technology deployments.	↑	★★★★☆
New Zealand: GDP growth	New Zealand's strong economic expansion is expected to slow, reflecting weaker growth in domestic demand and low investment levels. Household consumption especially is losing momentum as a result of repeated interest rate hikes, higher oil and food prices, and weaker housing market sentiment. Export volume has also fallen, putting net exports contribution to quarterly GDP growth in the negative territory.	Low. While New Zealand is a mature market with high IT penetration, the impact of the overall macro-economic climate has become less pronounced as certain IT products become more affordable and commercial buyers move more and more to a continuous refresh model as opposed to the large deals that have been seen in the past.	↓	★★★★☆
Vietnam: GDP growth	Real GDP growth will decelerate slightly as the global economy slows down. Nonetheless, in the next few years, growth will be driven by strong industrial expansion, consumer spending, and fixed investments.	High. The economy might be overheating, yet likely still continuing to improve over the past decade. This helps to maintain and further expand Vietnam's telecommunications infrastructure.	↑	★★★★☆

TABLE 3

Key Forecast Assumptions for Asia/Pacific (Excluding Japan) Content Management Software Market 2008–2012

Market Force	IDC Assumption	Impact	Accelerator/ Inhibitor/ Neutral	Certainty of Assumption
Oil prices	Oil prices are sky high and are likely to remain so for a while due to long-term capacity issue. Rising oil prices often translate into a reduction in GDP growth. Some AP governments are removing fuel subsidies though, which could put pressure on consumers.	Low. High oil prices may have some effect on the region's overall economy, but should have no direct impact on IT budgets. Average sales values (ASVs) may be impacted slightly due to higher costs of importing, but will also likely be relatively insignificant.	↓	★★★★☆
Compliance	Compliance is still driving some IT spending, including Sarbanes-Oxley, Basel II, and HIPAA.	Moderate. Compliance and governance will have a positive impact on spending on infrastructure software that aids in the archiving, protection, and recovery of data. Compliance spending seems to be funding itself through better-run business operations. CM will continue to benefit from this trend.	↑	★★★★★
Exchange rates	High inflationary rates experienced by a number of countries will be somewhat cooled by the strengthening of exchange rates (particularly so for Japan, Philippines, Malaysia, and the PRC) as imported commodities become cheaper in local-currency terms. However, countries whose currencies are depreciating against the U.S. dollar (such as Korea and Pakistan) will have to cope with imported inflation.	Low. Some countries will be affected either positively or negatively by this, but the region as a whole should continue its normal buying patterns.	↔	★★★★☆

TABLE 3

Key Forecast Assumptions for Asia/Pacific (Excluding Japan) Content Management Software Market 2008–2012

Market Force	IDC Assumption	Impact	Accelerator/ Inhibitor/ Neutral	Certainty of Assumption
Technology/ Service developments				
Security	Software is becoming more rather than less vulnerable. Hackers and others continue to find ways to misuse other people's software. Initially, this was done by exploiting vulnerability, but they are now finding ways to just misappropriate software without a vulnerability. Security software is more likely to be delivered as a service and/or a security appliance than it will be bought as shrink-wrapped products.	High. The ability to bury malware within other software will become a dangerous trend that will lead to improved spyware software and increase the need for software and application security tools at software development and deployment. It will also increase the need for intrusion prevention software that enforces application execution. Safeguarding IP and maintaining the privacy of sensitive information continue to be important drivers for CM software.	↑	★★★★☆☆
Software complexity	Advances in standards and application infrastructure (such as software-oriented architecture or SOA), while making it easier to build high-quality software, will add considerably to the complexity of resultant applications.	High. Complexity can work to the advantage of a vendor that provides an application or tool that promises to reduce complexity. However, indiscriminant and uncoordinated development of standards can have the opposite effect. Complexity also works to the advantage of large vendors that provide a single "integrated" software stack and is one of the key forces driving industry consolidation.	↓	★★★★☆☆

TABLE 3

Key Forecast Assumptions for Asia/Pacific (Excluding Japan) Content Management Software Market 2008–2012

Market Force	IDC Assumption	Impact	Accelerator/ Inhibitor/ Neutral	Certainty of Assumption
Software industry transformation	The software industry is going through a major transformation, including basic architecture (SOA), the way software is written (composite applications), and the way software is delivered (software as a service or SaaS) and even funded (advertising based). IDC assumes that this transformation will take a decade but that it will, when done, allow for much faster and more dynamic delivery of software functionality.	High. The new software creation and delivery models should allow for a quantum increase in the ability to deliver and integrate new software functionality to ICT systems. This should increase overall spending, even as it lowers costs.	↑	★★★★☆☆
Open source software (OSS)	OSS is a software that is provided with its source code. Although terms of use vary depending upon the type of license in effect, OSS is now beginning to impact many software markets.	Moderate. OSS today is having its biggest impact on mature markets where there is little product differentiation and product innovation has slowed significantly or ceased. OSS is an accelerator of technology use but inhibitor to price. OSS creates a downward pressure on prices where competing products are not well differentiated. OSS today provides an important glimpse into how software vendors will build value more around relationship and less around product.	↑	★★★★☆☆

TABLE 3

Key Forecast Assumptions for Asia/Pacific (Excluding Japan) Content Management Software Market 2008–2012

Market Force	IDC Assumption	Impact	Accelerator/ Inhibitor/ Neutral	Certainty of Assumption
Convergence	Convergence is a complex phenomenon working at many levels, convergence of the telephone network and the Internet; communications and IT technologies; consumer and enterprise technologies; and even storage, routing, and processing in the datacenter. Of these, perhaps the most overarching is the convergence of voice, video, and data communications. IDC assumes that this convergence is a permanent phenomenon and that it will pick up pace as the decade wears on.	High. Convergence will drive new competitive dynamics, offer new applications and functions to customers, and strain the legal and regulatory systems. It will also drive increased ICT spending. The imperative to deliver new content-rich services to consumers and organizations is an accelerator for CM.	↑	★★★★☆
Service industry transformation	The rise of offshore IT services, the increased integration of IT services inside business services, and the advent of new service delivery models have created a new dynamic for IT services firms. Most firms have developed a multishoring capability and blended pricing model and are now working on ways to standardize on technologies and methodologies, deliver services online or in new form factors, invest in datacenters, and expand into business services.	Moderate. These trends portend new competitive dynamics in the industry — software and online services competing with traditional IT services — as well as new thresholds for delivery. Online delivery models and operational standardization, from new technologies to remote infrastructure services, will allow faster and more efficient translation of service labor to client deliverable. As an important component in the information management infrastructure, CM will benefit.	↑	★★★★☆

TABLE 3

Key Forecast Assumptions for Asia/Pacific (Excluding Japan) Content Management Software Market 2008–2012

Market Force	IDC Assumption	Impact	Accelerator/ Inhibitor/ Neutral	Certainty of Assumption
Market ecosystem				
	There will be no major changes affecting IT spending; however, we expect to see the importance of the ecosystem increasing. This is the result of the increasing need of customers for solutions that integrate point products and services across vendors, as well as the need for more vertical-specific solutions. Additional impetus will come from customer peer relationships in growing communities and micro vertical channels (e.g., salesforce.com's AppExchange).	Moderate. Vendors will need to examine traditional supplier channel relationships and become more scientific about ecosystem decisions. IDC assumes many will delay action until more drastic rethinking is called for. The result in the near term could be to slow market spending for some customer segments (e.g., enterprise) while boosting spending in others (e.g., SME).	↔	★★★★☆☆
Market characteristics				
Commodity, volume-based solutions	Users will obtain, through volume channels, tools that offer commodity, platform-specific system management functionality at no or very low cost.	Moderate. Pricing pressure and margin opportunity will increase; the required functionality for system management products will rise and potentially demand more research and development (R&D) budget from system management-centric vendors.	↑	★★★★☆☆

TABLE 3

Key Forecast Assumptions for Asia/Pacific (Excluding Japan) Content Management Software Market 2008–2012

Market Force	IDC Assumption	Impact	Accelerator/ Inhibitor/ Neutral	Certainty of Assumption
Consolidation	Consolidation will focus power in the hands of a small number of very large vendors.	Moderate. Consolidation is inevitable, but it is unclear if consolidation is good or bad. Consolidation is good because it encourages broad-based vertical or horizontal integration, which tends to reduce perceived developer or end-user complexity. However, consolidation also can serve to reduce competition and therefore slow the pace of evolutionary market change. Consolidation is a relatively new phenomenon in the software industry, so while its effects are not yet well understood, industry change appears to be accelerating and innovation continues. Although the CM market has experienced considerable consolidation, there remains ample opportunity for innovators.	↔	★★★★☆
eGovernance initiatives	Governments in advanced APEJ countries are looking to provide enhanced services to their citizens, such as eforms. In addition, governments are looking to replace their paper-based information through digitization.	Moderate. While the governments in tech-savvy economies embrace the virtues of eGovernance, the demand for CM and records management solutions will increase. However, this trend is not true for all countries in the APEJ region; many governments in the developing or emerging countries have yet to embark on government initiatives	↑	★★★★☆

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Key Forecast Assumptions for Asia/Pacific (Excluding Japan) Content Management Software Market 2008–2012

Market Force	IDC Assumption	Impact	Accelerator/ Inhibitor/ Neutral	Certainty of Assumption
Product bundling	As consolidation in the CM market continues, vendors will exploit opportunities to bundle their CM solutions with other product lines to cross-sell and upsell to new customer bases.	High. The marketplace is moving toward a unified platform that does not recognize separate systems/silos, as this is a business problem. Hence end users will look to implement a platform across which content can flow seamlessly to support any business process from end to end.	↑	★★★★☆☆
On-demand applications	The software industry is going through a major transformation, from basic architecture (SOA), the way software is written (composite applications), and the way software is delivered (SaaS) and even funded (advertising based). Vendors offering infrastructureless applications (on demand), will continue to garner share from license-only oriented vendors.	Moderate. We expect the CM market to experience growth in on-demand revenue from other application markets; large vendors are beginning to provide on-demand solutions for content collaboration. The demand for license flexibility is not expected to impact IT expenditure; however, businesses in the APEJ region that have small IT budgets will favor licensing flexibility.	↔	★★★★☆☆
Consumption				
SME market	SME's in the APEJ region have yet to embrace CM solutions; whether this is due to the lack of content in their organizations or that CM is not high on their priority list is unclear. Hence, vendors in the market continue to target large enterprises with a high volume of unstructured content and that operate in heavily regulated markets.	Low. SMEs in the APEJ region are not expected to implement CM solutions in the near future. Nevertheless, this market segment does present untapped potential that vendors will be able to realize with an SME-focused CM solution at a feasible price point. Some medium-sized enterprises, in the advanced APEJ economies, may prove to be early adopters of CM solutions.	↔	★★★★☆☆

Legend: ★☆☆☆☆ very low, ★★☆☆☆☆ low, ★★★☆☆ moderate, ★★★★☆☆ high, ★★★★★ very high

Source: IDC, 3Q08.1

Major Vendors Analysis

IBM

In the region's CM market, IBM leads with a revenue of US\$33.48 million, which is 18.42% of the market share in 2007. With the acquisition of FileNet, the IBM Content Management portfolio of products include FileNet Content Manager, Content Manager, Content Manager OnDemand, FileNet Image Manager Active Edition, FileNet Content Services, and FileNet Connectors for Share Point.

IBM unveiled enhancements to the IBM Content Management 8.4 family of software products, which now includes IBM WebSphere Information Integrator Content Edition (IICE) V 8.4 and IBM WEBi V1.02 as well. IBM Web Interface for Content Management (WEBi) V1.02 provides an interactive client that allows users to access documents from an IBM Content Manager repository via a Web browser. Also, IBM FileNet Records Crawler and IBM FileNet business process management (BPM) capabilities are available for integration with IBM Content Manager 8.4. FileNet P8 4.0 as the first major product release since IBM acquired FileNet in October 2006. FileNet P8 4.0 complements the company's strategy through its broad support for leading OSs, databases, desktop, and portal environments.

IBM has a significant presence in government, retail, healthcare, financial and manufacturing sectors. The company's main focus is to establish its solution as the platform standard in regional leadership accounts.

IBM continues to strategically engage its partners by developing Global System Integrator relationships, leveraging ValueNet and Partner World, and extending partner education and certification. All the ValueNet Partners were retained post FileNet acquisition. Also, IBM CM8 partners as well join ValueNet. IBM is expanding its consulting services as part of its global CM services practice that includes consulting and integration (C&I) capabilities. With the expanded FileNet consulting practice, there will be a dedicated team to provide a range of CM consulting services to FileNet and IBM Enterprise Content Management clients.

The combined FileNet and IBM Content Management software portfolio and services is positioned to provide clients with choices to best meet their needs, whether for business process integration, compliance and risk management, or point solutions for specific business requirements, all of which may require content integration in a multi-vendor environment. The company is committed to support both the FileNet and IBM Enterprise Content Management platform and are focused on helping clients preserve their investments in existing content repositories, data, and applications. The challenge for IBM will be to increase its presence in countries that are business process-centric markets and have a long learning curve.

EMC

EMC Corp. is an enterprise information infrastructure provider, with a product portfolio that spans from hardware systems to software, services, and solutions. EMC's estimated revenue in the APEJ CM market was US\$28.7 million, a 15.79% market share.

EMC has its best of resources dedicated to ANZ in terms of sales and support team and considers it as the strongest region. South Asia, which includes countries like Singapore, India, Malaysia, Thailand, and Vietnam seems very promising in the coming years, with India emerging strong. 2007 turned out to be the transition year for EMC, with the backup and archiving solutions being bifurcated from CM.

EMC targets all the industry verticals but had significant wins from the financial and government sectors. EMC's Transactional Content Management has helped a lot of customers to define their business processes and deal with compliance issues. The document capture product, Captive, has also contributed to the success of CM product by facilitating as a foot in the door strategy.

EMC has a small set of value-add partners and have their resources enabled into them. Their primary focus is to maintain relationships with regional partners, as they have the regional expertise for executing product integration and implementation. Local partners are seen to be better acquainted with the customer's economic and business environment and are well positioned to work as integrators of EMC's CM solution. They also have global partners like Accenture, Capgemini, and regional partners like HCL, Unisys, and Wipro.

EMC unveiled Documentum6 enterprise content management (ECM) platform, which is a key piece of EMC's Documentum suite — enabling rapid and flexible development, configuration, and deployment of enterprise content applications. EMC is focused on defining the four key pillars for the next phase of ECM that includes a Web 2.0 user experience, a focus on intelligence and analytics across all types of content and business processes, an extremely scalable standards-based SOA infrastructure, and the broadest content life-cycle support.

Alignment with the customers in different regions with different business environment and economics is still a challenge for EMC, as for other vendors. However, with regional partners ecosystem and upcoming enhancements to its CM suite of products, EMC is expected to maintain and grow its share in the market. Restructuring of its product suite and alignment with the local partners is expected to further accelerate EMC's growth in this region.

Tower Software

Tower Software was the third-largest vendor in the APEJ CM market with estimated software revenue of US\$14.75 million with 8.11% market share in 2007. Most of Tower's client base in the region is in Australia., although the vendor has seen some success in expanding its footprint in North America and Europe. TRIM Context 6 is the CM solution from Tower software. Tower's software products include electronic document and records management, business process automation, Web CM, document capture and assembly, collaboration and information management solutions.

Tower software has a large footprint in the public sector such as with Central government, Defense and intelligence organizations, State and Local government and private industries with accountability to regulatory authorities. TOWER Software maintained strategic partnerships with the technology and information management leaders, including: Microsoft, HP, Adobe Systems, and Kofax.

In March 2008, Tower software signed a pre-bid agreement to be acquired by HP. The acquisition of Tower is intended to add electronic records management to HP Software's existing ediscovery and compliance capabilities in information collection and retention. This includes both records management and identification, which is important for organization due to rules and regulations such as the Federal Rules of Civil Procedure, the SOX and the Data Protection and Freedom of Information Acts. The focus is to provide an integrated records management and compliance archiving solution by combining Tower TRIM Context and HP Integrated Archive Platform.

The blend of HP and Tower is expected to provide a comprehensive portfolio of enterprise information and IT management software solutions and emerge sturdily as a CM provider in APEJ.

Interwoven

Interwoven bagged the fourth spot in the region's 2007 CM market with estimated US\$9.69 million revenue and 5.33% market share. Interwoven positions itself as an online conversion vendor with Web Content Optimization rather than the traditional Web Content Management. Interwoven also offers an array of other CM solutions such as, Interwoven Records Management; Interwoven Email Management; and Interwoven Collaboration and Document Management, among others.

Interwoven has a strong presence in the government sector along with financial, retail, IT, and airlines industry. Interwoven has offices across the region with customer support centers. The company is also coming up with the development centers in the APEJ region.

In recent years, Interwoven has added a stack of products and solutions through acquisition of digital asset management, collaborative document management, records management, content publishing, Web site optimization, and capital markets vertical market capabilities. In November 2007, Interwoven acquired Optimost, a provider of software and services for Web site optimization and are as well positioning it as a SaaS offering. The company is working with a lot of interactive and advertising agencies throughout the APEJ region and organizing trainings. More than 50% of the new license revenue from customers was influenced by or co-sold with their strategic partners and resellers such as Microsoft and CrimsonLogic Pte Ltd.

With Web appearing on the radar of many APEJ organizations, Interwoven is prepared to meet the requirements of these potential customers. To compete in the market and sustain its growth, Interwoven will have to depend on its recent acquisition and the relationship with its partners and resellers.

Kofax

Kofax was the fifth-largest vendor in the APEJ CM market with estimated software revenue of US\$9.41 million (5.17% market share) in 2007. Kofax Intelligent Capture & Exchange is the centerpiece of its strategy and is positioned to help organizations streamline business processes.

Kofax has customers in financial services, manufacturing, retail, government, healthcare, business process outsourcing (BPO), and other markets. Kofax successfully increased its overall market share on the strength of its VAR channel and vertical solutions. It has partnerships with Canon, HP, and Fujitsu. Kofax organizes road shows across the region as its go-to-market strategy.

Kofax's primary focus is solution-based selling rather than product selling. The Kofax product branding initiative reflects the market trend toward consolidation of information capture enabling technologies along the capture, transformation, and communication value chain. The combination of strategic product investments and a simplified product brand should further strengthen the company's position in the information capture market segment. Kofax Intelligent Capture & Exchange serves as the foundation for the branding initiative.

Kofax Intelligent Capture & Exchange will be resold and supported by HP. Key elements of Kofax Intelligent Capture & Exchange will be integrated into HP's imaging and printing solutions. Also, Open Text's line of ECM software solutions are combined with key elements of Kofax Intelligent Capture & Exchange to provide an integrated, enterprise-scale information capture solution for streamlining business processes throughout an organization.

Kofax is coming up with a simplified product branding that consolidates the company's diverse product portfolio into a consistent and unified architecture. This strategy is expected to help Kofax address the needs of market channels, including the certified reseller, solution providers, ISVs, and OEMs. Customization and local language adoption are some of the challenges that Kofax needs to overcome to compete and increase its market share.

Microsoft

Microsoft is estimated to account for 4.52% share of the overall CM market. Microsoft's ECM solution includes document management, records management, Web CM, and forms solutions.

Microsoft has a strong presence in government, financial, and manufacturing sectors. The focus is to support the existing customers by building capacity with the partners and also through their consulting arm.

Microsoft supplement and compliment many training, seminar, and workshop for its partners. The partners also gain access to Microsoft's facilities including performance lab, training, and executive briefing center. Microsoft also works with other vendors in the CM market to provide integrated solutions. For instance, Microsoft is working with Open Text to come up with an integrated solution and practice support targeted to law firms. This solution is expected to combine Open Text's specialized legal industry expertise in matter life-cycle management and proactive compliance, with the collaboration and document management capabilities of Microsoft Office SharePoint Server 2007.

Microsoft Office SharePoint Server 2007, with its new CM capabilities, has begun to have an impact on the overall CM market as a significant percentage of SharePoint users are expected to evaluate Microsoft Office SharePoint Server 2007 for content

management. Smaller .NET-centric CM vendors that provide basic content services may find it difficult to compete with Microsoft unless they offer a unique value proposition. Microsoft needs to emphasize its positioning as an end-to-end solution for the whole organization and work closely with partners to gain momentum and continue expanding its footprint in the region.

Market Context

IDC published *Asia/Pacific (Excluding Japan) Content Management Software 2007-2011 Forecast: Market Sizing — Steady Growth, Rapid Consolidation* (IDC #AP322108P, July 2007). In this year's report, the CM market in 2006 has been revised slightly upward by US\$3.68 million (i.e., by 2.5%). Changes made to the CM market 2006 were primarily due to better feedback from vendors and the inclusion of Tower Software and Kofax in this year's report.

Table 4 compares the previous APEJ revenue forecast with the current forecast, as well as the previously published annual growth rates to the current growth rates. A graphical comparison of the previously published annual growth rate with the current growth rate is presented in Figure 3.

The overall forecast has been revised upward slightly due to better CM expectations from some of the countries, which is consistent with IDC's findings in Figure 1. Most of the increase in forecast derives from Australia and New Zealand. Australia's IT market in general is still expected to do well and is expected to continue focusing on large IT transformation projects among businesses. New Zealand introduced Public Records Act, leading to audits of all government agencies over a five-year cycle, with the first audit expected to take place in 2010. IDC expects CM adoption from these government agencies to increase prior to the audits. Most of the expected growth rates for the rest of the APEJ countries have either been decreased slightly or have not been changed for now.

TABLE 4

Asia/Pacific (Excluding Japan) Content Management Software Market Revenue, 2005–2012: Comparison of June 2007 and July 2008 Forecasts

	2005	2006	2007	2008	2009	2010	2011	2012
July 2008 forecast (US\$M)	127.62	148.68	181.82	207.90	238.36	273.53	314.31	362.03
Growth (%)	N/A	16.51	22.29	14.35	14.65	14.75	14.91	15.18
June 2007 forecast (US\$M)	127.62	145.00	166.24	190.41	217.05	246.80	281.04	N/A
Growth (%)	N/A	13.62%	14.65%	14.54%	13.99%	13.71%	13.87%	N/A

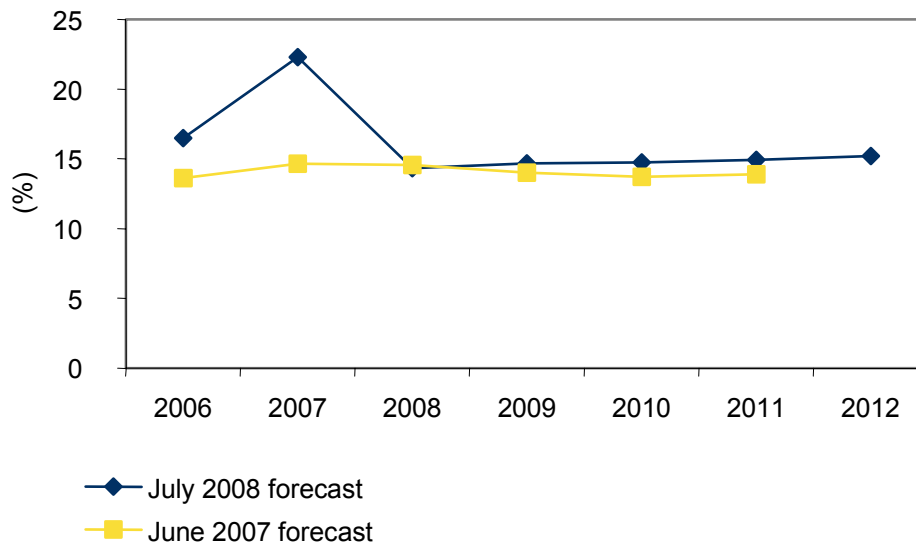
Notes:

- See Asia/Pacific (Excluding Japan) Content Management Software Forecast 2006–2010: Market Sizing — Steady Growth, Rapid Consolidation (IDC #AP322106N, May 2006) for the entire prior forecast document.
- See Table 3 for key forecast assumptions.

Source: IDC, 3Q08.1

FIGURE 3

Asia/Pacific (Excluding Japan) Content Management Software Revenue Growth, 2007–2012: Comparison of June 2007 and July 2008 Forecasts



Source: IDC, 3Q08.1

ESSENTIAL GUIDANCE

The mergers and acquisitions (M&A) trend that has characterized the CM market over the past several years continued at a more modest pace in 2007, as midsize and smaller vendors were snapped up. We can expect to see a few more acquisitions of pure-play CM vendors in 2008. Overall, we expect the share of the leading players to continue to rise slowly as they embed CM services into their middleware, storage and archival solutions, and enterprise applications.

Another emerging trend among organizations in the APEJ region is the focus on selling and marketing through online channels. This trend has allowed the concept of Web CM to gain traction in the APEJ region, as organizations are seeking to leverage online channels to reach a broad audience through multiple devices. This trend is expected to grow in the region as financial services, telecommunications, and media and entertainment companies want to present their brand, products, and services to the global market through multiple channels.

IDC offers the following guidance for vendors that are looking to enlarge their footprint in the APEJ region's CM software market:

- ☒ **Building the partner network.** Partners continue to play an important role in the region due to the vast geographical spread and huge economic and cultural diversity of the countries in APEJ. Building a viable partnership ecosystem that includes local/regional and hardware vendor alliances will be important to succeed in the region. As industry-specific business processes and regulations can be unique in different countries, local partners can prove a rich source of local knowledge that can provide vendors with a key differentiator in the market.
- ☒ **Exploring new markets with end-to-end integrated solutions.** While compliance and strict record keeping in particular industries (banking, healthcare, legal, financial services sectors) continue to drive adoption of CM solutions, there are other sectors that present opportunities for CM vendors. Professional services firm like law firms, media and entertainment, and ecommerce verticals can be explored extensively. Independent or niche vendors could take advantage of the growing need in these segments by developing vertical-specific CM applications.
- ☒ **Focusing on emerging countries like India and PRC.** Benefits can be reaped from these countries by implementing appropriate market strategy and building relationship with the customers. SI capability in India and the increasing online trends in the PRC can be taken advantage of and will help vendors in increasing their market share. Alliancing with the local vendors as customization and localization are important for success.
- ☒ **Local vendors.** Local vendors are also expected to face challenging times ahead; especially since consolidation in the CM market may bring in large global vendors into their specialized CM niche. As the local vendors are well versed with the local market environment and economy, they can grow by making the challenges faced by the global companies as their key strengths. Local vendors can benefit through providing in-depth expertise on language and from lower-cost operating environments.

LEARN MORE

Related Research

- ☒ *HP Looks to TOWER Software to Strengthen Its Information Management Portfolio* (IDC # NZ327102Q, April 2008)
- ☒ *Asia/Pacific (Excluding Japan) Application Development and Deployment Software Market Highlights, July–December 2007* (IDC #AP322103Q, March 2008)
- ☒ *Asia/Pacific (Excluding Japan) Application Development and Deployment Software Market Highlights, January–June 2007* (IDC #AP3221S1P, January 2008)
- ☒ *IBM Serving up Information on Demand* (IDC #AP322117P, October 2007)

Appendix: Asia/Pacific (Excluding Japan) Content Management Software Market by Country, 2007

TABLE 5

Australia Content Management Software Market Top 5 Vendors, 2007 (US\$M)

Vendor	Revenue	Market Share (%)
Tower Software	13.13	22.44
IBM	12.17	20.80
EMC	8.75	14.96
Kofax	5.03	8.60
Open Text Corp	4.67	7.99
Others	14.75	25.21
Total	58.50	100.00

Note: The data refers to software license, maintenance, and subscription/other software revenue only.

Source: IDC, 3Q08.1

TABLE 6

Korea Content Management Software Market Top 5 Vendors, 2007 (US\$M)

Vendor	Revenue	Market Share (%)
IBM	5.94	14.15
I-ON Communications	5.89	14.04
EMC	4.61	10.97
Cyberdime	4.35	10.37
HandySoft Global Corp.	3.84	9.15
Others	17.34	41.32
Total	41.96	100.00

Note: The data refers to software license, maintenance, and subscription/other software revenue only.

Source: IDC, 3Q08.1

TABLE 7

People's Republic of China Content Management Software Market Top 5 Vendors, 2007 (US\$M)

Vendor	Revenue	Market Share (%)
EMC	3.00	14.78
IBM	2.02	9.95
Microsoft Inc.	1.13	5.58
Vignette	1.00	4.95
Open Text Corp	0.77	3.78
Others	12.37	60.95
Total	20.29	100.00

Note: The data refers to software license, maintenance, and subscription/other software revenue only.

Source: IDC, 3Q08.1

TABLE 8

India Content Management Software Market Top 5 Vendors, 2007 (US\$M)

Vendor	Revenue	Market Share (%)
Newgen Software	4.50	25.50
EMC	3.50	19.83
IBM	2.30	13.03
Microsoft Inc.	1.90	10.76
Interwoven	1.40	7.93
Others	4.05	22.95
Total	17.65	100.00

Note: The data refers to software license, maintenance, and subscription/other software revenue only.

Source: IDC, 3Q08.1

TABLE 9

Singapore Content Management Software Market Top 5 Vendors, 2007 (US\$M)

Vendor	Revenue	Market Share (%)
EMC	3.54	24.88
IBM	3.08	21.63
Interwoven	1.98	13.94
Open Text Corp	1.48	10.38
Kofax	1.40	9.84
Others	2.75	19.32
Total	14.23	100.00

Note: The data refers to software license, maintenance, and subscription/other software revenue only.

Source: IDC, 3Q08.1

TABLE 10

Taiwan Content Management Software Market Top 5 Vendors, 2007 (US\$M)

Vendor	Revenue	Market Share (%)
IBM	1.67	20.72
Interwoven	0.98	12.16
Microsoft Inc.	0.31	3.85
EMC	0.30	3.75
Open Text Corp	0.22	2.71
Others	4.58	56.82
Total	8.06	100.00

Note: The data refers to software license, maintenance, and subscription/other software revenue only.

Source: IDC, 3Q08.1

TABLE 11

New Zealand Content Management Software Market Top 5 Vendors, 2007 (US\$M)

Vendor	Revenue	Market Share (%)
Tower Software	1.62	23.99
EMC	1.40	20.70
IBM	1.28	18.93
Vignette	0.54	7.98
Interwoven	0.51	7.54
Others	1.41	20.85
Total	6.76	100.00

Note: The data refers to software license, maintenance, and subscription/other software revenue only.

Source: IDC, 3Q08.1

TABLE 12

Malaysia Content Management Software Market Top 5 Vendors, 2007 (US\$M)

Vendor	Revenue	Market Share (%)
EMC	1.60	31.12
IBM	1.59	30.88
Kofax	0.52	10.10
Interwoven	0.33	6.34
Open Text Corp	0.22	4.24
Others	0.89	17.31
Total	5.14	100.00

Note: The data refers to software license, maintenance, and subscription/other software revenue only.

Source: IDC, 3Q08.1

TABLE 13

Hong Kong Content Management Software Market Top 5 Vendors, 2007 (US\$M)

Vendor	Revenue	Market Share (%)
IBM	2.51	50.94
EMC	0.60	12.15
Vignette	0.49	9.95
Interwoven	0.34	6.86
Kofax	0.31	6.30
Others	0.68	13.80
Total	4.93	100.00

Note: The data refers to software license, maintenance, and subscription/other software revenue only.

Source: IDC, 3Q08.1

TABLE 14

Thailand Content Management Software Market Top 5 Vendors, 2007 (US\$M)

Vendor	Revenue	Market Share (%)
EMC	0.90	37.27
IBM	0.44	18.31
Interwoven	0.15	6.35
Kofax	0.13	5.15
Microsoft Inc.	0.10	4.10
Others	0.70	28.83
Total	2.43	100.00

Note: The data refers to software license, maintenance, and subscription/other software revenue only.

Source: IDC, 3Q08.1

TABLE 15

Rest of Asia/Pacific (Excluding Japan) Content Management Software Market Top 5 Vendors, 2007 (US\$M)

Vendor	Revenue	Market Share (%)
EMC	0.50	26.72
IBM	0.49	26.28
Microsoft Inc.	0.16	8.50
Kofax	0.15	8.18
Interwoven	0.13	6.95
Others	0.44	23.37
Total	1.86	100.00

Note: The data refers to software license, maintenance, and subscription/other software revenue only. ROAPEJ includes Philippines, Vietnam, Indonesia, and ROAPEJ.

Source: IDC, 3Q08.1

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