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The Future of Enterprise Content Management: Hybrid ECM

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The rise of mobile, social, and cloud computing — and the shift to what IDC calls the "3rd Platform" — is dramatically changing the way people work, and this has major implications for the management of enterprise content. Users need to be able to share information easily with collaborators, and they need to be able to access their content anytime, anywhere, and using any device — whether a laptop computer, a smartphone, or a tablet. At the same time, organizations must ensure that enterprise content is secure and managed in accordance with governance and compliance policies. Hybrid enterprise content management (ECM) offers a solution. It addresses the often conflicting requirements of both users and IT and gives enterprises the strategic platform they need to manage enterprise content in the hybrid cloud/on-premise environments that will characterize enterprise IT for years to come.

The following questions were posed by Alfresco to Melissa Webster, vice president of IDC's Content and Digital Media Technologies research, on behalf of Alfresco's enterprise customers.

Q. In a changing IT landscape, where the use of cloud apps is growing in the enterprise and users are increasingly managing their work lives via mobile devices, what are the key challenges affecting the way organizations need to manage their enterprise content?

A. Users want to be more productive and are clamoring to use mobile devices to get their work done. As IDC research shows, two-thirds of information workers expect to use their smartphones and tablets for work purposes. They want to access enterprise content and do everything with their documents that they do with their laptop computers — including viewing and editing, creating new editions, reviewing changes and approving, sending documents to others, and so forth. They also want to be able to work offline, while disconnected from the network.

Users also need an easy way to share information with others, including external collaborators. IDC research shows that information workers spend about half their time collaborating with others, and two-thirds of these workers collaborate with people from other organizations on a weekly basis.

Enterprise IT departments have struggled to enable these use cases. Most are unwilling to create accounts on the corporate network for external users due to information security concerns. Extranet projects, which typically entail considerable time and effort to develop, often fail to see good user adoption. Building custom mobile apps from scratch for all of these use cases is expensive and time consuming.

As a result, users have turned to consumer-style cloud file sync and share services. These services are very easy to use, and we've see viral adoption. But this is creating a new flavor of shadow IT and a whole slew of challenges when it comes to managing enterprise content.

Enterprise content is being scattered across any number of cloud services — creating lots of new content silos — and the organization has no idea where the content is. There is no concept of federated search, so the content isn't discoverable. There's little or no metadata associated with the content, so there's no way to classify it. There is no governance — no visibility or control. This creates all kinds of risk, including business risk, compliance risk, and information security risk, and important content is easily lost. In an era where enterprise content management is increasingly converging with enterprise social computing to make content more relevant and discoverable, the consumer file sync and share apps invite anarchy.

Q. What is hybrid ECM, and what benefits do hybrid architectures potentially offer enterprises?

- A. Hybrid ECM is a deployment architecture that combines on-premise and cloud computing in a seamless and flexible way. It marries enterprise-class cloud file sync and share with enterprise content management. It provides an end-to-end, managed environment that lets organizations empower users while retaining full control over their enterprise content. It's the best of both worlds, and it lends itself to numerous scenarios.

For example, organizations can choose to manage their sensitive content in a repository behind the firewall and then externalize that content via the cloud to users on mobile devices and to external stakeholders. In this scenario, the cloud essentially becomes a caching mechanism. It's the sync and share interface for team collaboration. It gives organizations a way to push approved content — such as the latest price list or updated sales collateral — from the enterprise repository to relevant users who need access from outside the firewall. It's also a mobile interface for content-centric business processes: Mobile field workers such as onsite personnel and claims adjusters can submit documents via the cloud to initiate workflows in on-premise applications. Or, organizations can leverage hybrid ECM solutions for both cloud content management and on-premise content management. They might use the cloud as their primary content management solution for collaboration, and then once content is in its "final form," sync it with the on-premise repository for safekeeping.

Similarly, they might use cloud content management to support their SaaS enterprise applications and use on-premise content management to support their on-premise enterprise applications. Organizations whose IT strategies are "cloud first" or "SaaS first" are good candidates for this approach. A hybrid ECM solution lets these organizations migrate gracefully, over time, to cloud content management.

In all of these scenarios, the organization's enterprise content is managed in accordance with governance and compliance policies. It's searchable and discoverable. Records are managed in a uniform way. There are no more silos or unmanaged content. Most organizations will have a variety of use cases, and hybrid ECM can accommodate all of them via configuration and appropriate policies.

Q. Why is hybrid a particularly good fit for ECM?

- A. Hybrid is a good fit for ECM because ECM plays such a big role in diverse use cases and applications. ECM is a foundation for collaboration, and it's also the document system of record for enterprise applications such as ERP, CRM, HCM, SCM, and other systems. A whole host of content-enabled applications — including many that are industry specific —

rely on ECM for content and document management services. Over the past few years, we've seen a proliferation of case management applications that address exception management in core business processes, and these applications fill gaps in the mission-critical systems that run the business.

Some of these use cases need to run in the cloud, while others run on-premise. Certainly, for collaboration, the cloud is very compelling. Users want the flexibility to share with external collaborators, and they want to sync relevant content to their mobile devices so that they have what they need if their Internet connection is lost. But the content needs to be managed. So they need cloud content management.

Conversely, it's not practical — or even desirable — to move ECM to the cloud while the applications that consume enterprise content continue to run behind the firewall. And that's where most enterprise applications still run today.

Hybrid ECM gives organizations an elegant way to address these diverse use cases and resolve the inherent tension between use cases that are more cloud focused and use cases that need on-premise services. As SaaS adoption continues to grow, hybrid ECM gives organizations the flexibility to move applications — together with related enterprise content — to the cloud. Organizations are still evolving their cloud strategies, so that flexibility is a big advantage.

Q. What should organizations look for if they are evaluating a cloud provider for content management?

A. We think it's important to choose a solution that's easy to use. As history has shown, users will seek alternatives on their own if the solution that IT provides isn't intuitive. In this age of "consumerized IT," look for solutions that require little or no user training. After all, you can't train the external collaborators. Related to this, look for solutions with browser-based viewers that let users on mobile devices preview and potentially edit documents without requiring them to install an app (often, no app is available for the user's particular device).

Select a solution that provides granular controls over content sharing to safeguard enterprise information. This includes the ability to restrict access not just to folders but also to individual files — along with permissions that govern what users can and cannot do with those files.

Strong administrative capabilities are very important. IT needs the tools to manage the cloud environment. Look for solutions that offer distributed, delegated user provisioning and integration with enterprise directory systems to minimize the time and effort required for user administration. You'll also want good reporting capabilities: It's critical to select a solution that provides an audit trail showing what content was accessed when and by whom — and what was done with the content.

Choose a vendor that offers a proven, robust, and scalable solution. Some vendors host their own solutions, while others utilize a public cloud infrastructure. Either strategy can work well as long as strong SLAs are in place for uptime and security. Guarantees provided by public cloud infrastructure providers are a good yardstick.

Finally, a large partner ecosystem is very valuable. Cloud solutions are evolving at a very rapid pace, and we're seeing tremendous innovation. Choose a vendor that is fostering a strong partner ecosystem so you can benefit from all of this innovation. There's a wide variety of complementary solutions to take advantage of — including collaborative authoring and annotation, esignatures and rights management, mobile device management and security, and case management apps. Choose a vendor that is building a strong ecosystem around its platform.

Q. Will hybrid be the right model for ECM for the foreseeable future? Or is this a point-in-time solution as all content moves to the cloud?

A. IDC's view is we're in the midst of a very long-term shift to cloud computing that will unfold over the next couple of decades. We're still in the early stages of this shift — in fact, much of the focus so far has been on private cloud and virtualization (of servers, storage, clients, and networks). It will take a long time for organizations that run their own datacenters to move *all* of their mission-critical applications to the cloud. We believe that even then, they will use a mix of public and private clouds. Most organizations will continue to run hybrid IT environments indefinitely — on a mix of application deployment architectures.

Hybrid ECM responds well to this. It supports both current and future content management needs in those mixed application environments. We view hybrid ECM as a long-term strategy.

ECM is intricately tied to the applications that consume enterprise content. It's difficult to move ECM to the cloud when those applications continue to run behind the firewall. A hybrid ECM solution lets customers move the content that can be moved to the cloud, leaving what shouldn't (yet) be moved on-premise. Because the location of the content is transparent to the application and to the users who access the content, companies have the flexibility to leverage cloud ECM as part of their strategy. They can use cloud ECM for new cloud-based applications or to serve mobile users and enhance collaboration without disrupting existing production applications.

Hybrid ECM isn't just a means to an end. It's the solution for the mixed deployment environments that will characterize IT for years to come.

ABOUT THIS ANALYST

Melissa Webster leads IDC's Content and Digital Media Technologies research program. This program tracks, analyzes, and forecasts markets and trends in enterprise document and content management, records management, Web content and digital asset management, and authoring and publishing software.

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