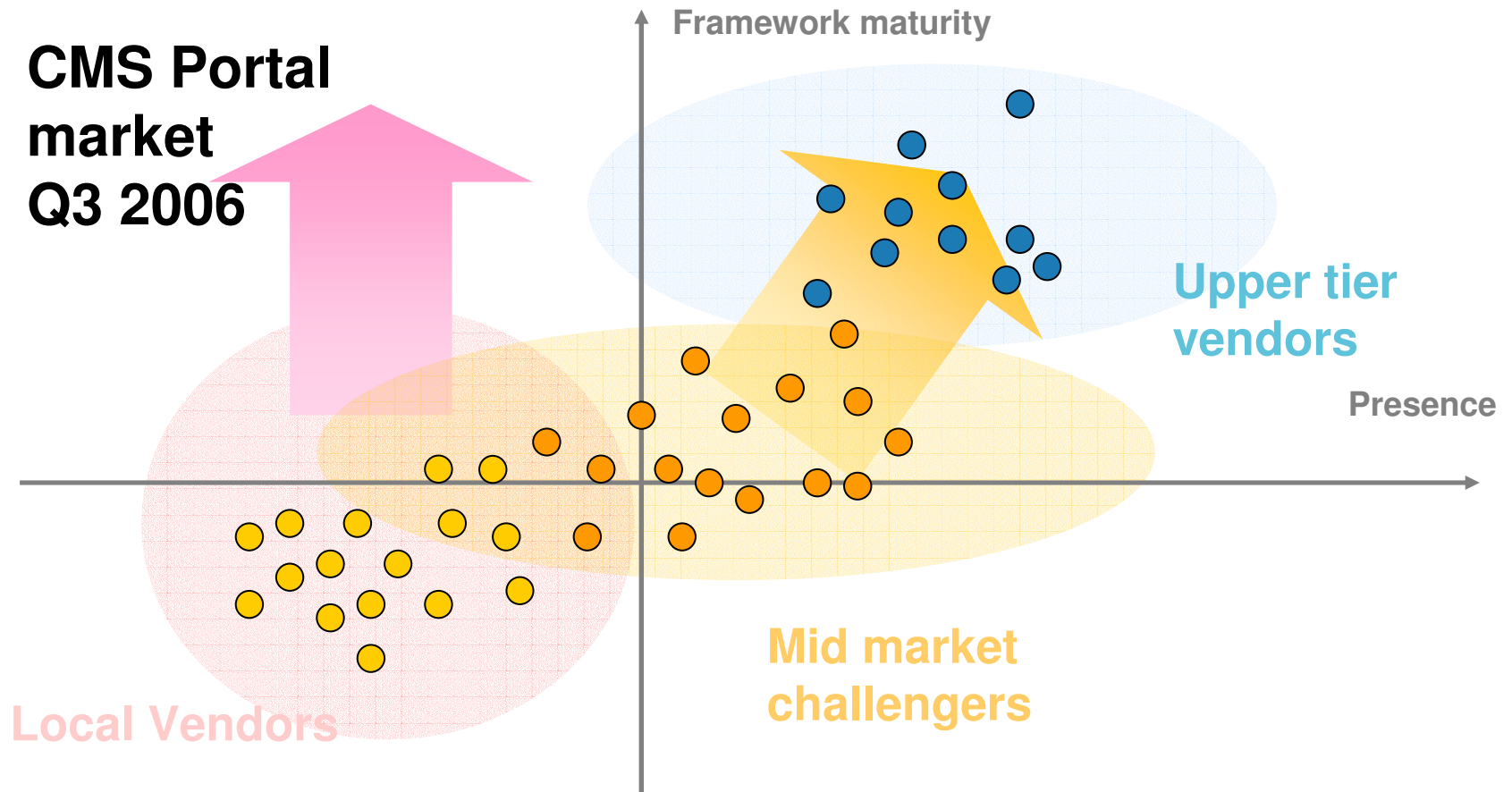


Observations



Observations – Product market

**CMS Portal
market
Q3 2006**



Observations – Product market

USA vs. Europe:

USA - Big is beautiful

**Different Companies
and Cultures?**



Observations – Product market

**What the #°\$α#°α#
is going on in Asia?**



Observations – Product vendors

Web 2.0

Europe vendors rules

.... today



Observations – Product vendors

Big is beautiful, but ...

**... smart mice survives on speed
and third party integration on
standard platforms**



Observations – Product vendors

**The best are
moving
in the market**



Observations – Product vendors

J2EE versus .NET

Europe and USA

Divided



Observations – Product vendors

**Big spenders
acquire
big vendors**

Stellent -> Oracle Reddot

Hummingbird - > Open text

Filenet -> IBM



Observations - Service vendors

The big stay "Big"

**The midsize are
maturing**

**The small are getting
stronger**



Observations – Customers

If you invite elephants to the party:

Rocking, if you have the right music to get them on the dancefloor

... and the muscles to get them out when the party ends



Observations – Customers

**It's alright to have
mice and elephants at the
same party**

... If they dance to your music



Observations – Product vendors

Some elephants are getting agile

**Other elephants
... are just elephants by nature**



Observations – Business models

**Open source and
commercial business
models and mechanics
are converging**



Observations – Business models

Free CM Infrastrucure

Death of the partner strategy?



Observations - Customers

Customers on their third CMS project:

Have already taken their pills and are getting analytic!



Observations - Terminology

”Enterprise Content Management Systems (ECMS)”

Why make a short story long?



Observations - Terminology

”Smart Enterprise Suites”

NEVER WALKED

THE TALK

Mergers and acquisitions

haven't changed that



Observations - Terminology

The Global Enterprise Content Management System Provider



Observations - Terminology

**... is a global provider of
content management
software solutions**



Observations - Terminology

**.... built upon a unified
architecture ...**



Observations - Terminology

....that drive rapid success for customers by enabling fast implementations and generating quick, broad user adoption ...



Observations - Terminology

Show us what you've got!



See you next year!

Thanks for your time!

