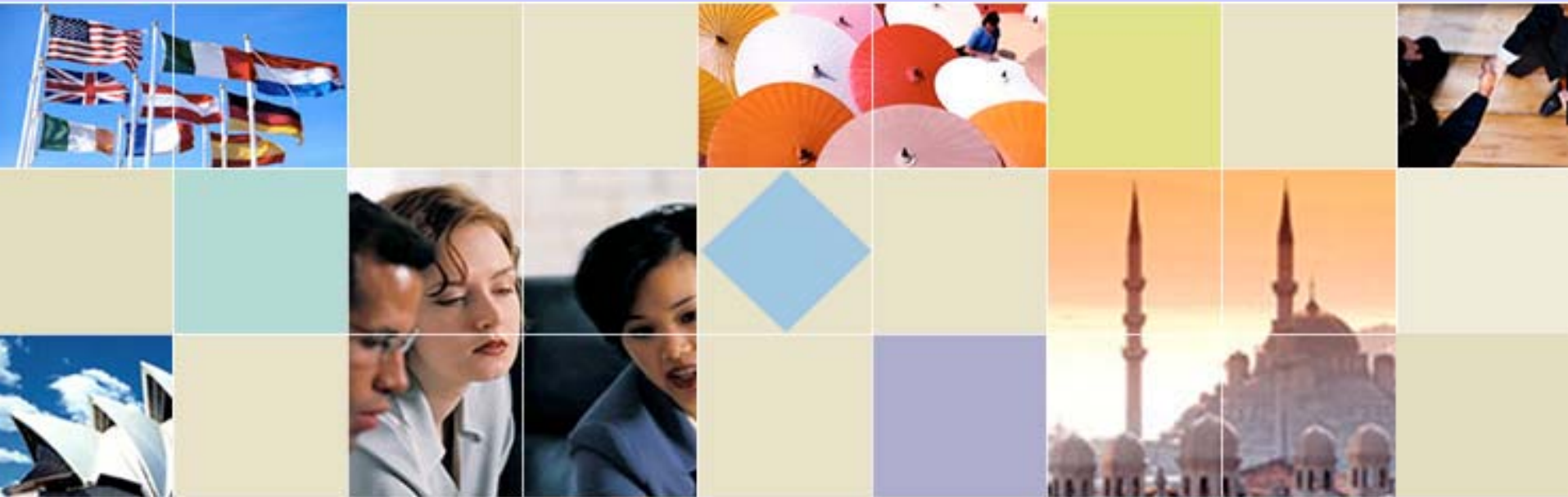


Market opportunities for LangTech: unscrambling KM



LangTech 2003

Paris, 25 November 2003

Rose Lockwood, Bowne Global Solutions



The questions...

- What is knowledge management?
- What is the market for knowledge management?
- Where does LangTech fit in?



A motley collection of technologies & apps identified as KM, by CIOs, CTOs, & IT Managers

CIO Insight & survey.com - 2001

Group productivity

- Project management 61%
- Collaboration/groupware 54%
- Instant messaging 52%
- Web conferencing 36%

Personal productivity

- Brainstorm/creativity tools 49%
- Data visualization 42%

Search 57%

Infrastructure

- Intranet infrastructure 64%
- Internet infrastructure 62%
- Portal technology 50%

Information management

- Data mining and reports 49%
- Concept mapping 43%
- Metadata cataloguing 36%
- Decision modeling and predictive modeling 32%

Content/document

- Web publishing 52%
- Document management 52%
- Workflow systems 48%
- Document imaging 47%



Commitment of budget to software for KM applications - 2001

(IDC survey)

Types of Software Purchased for Knowledge Management Initiatives, 2001



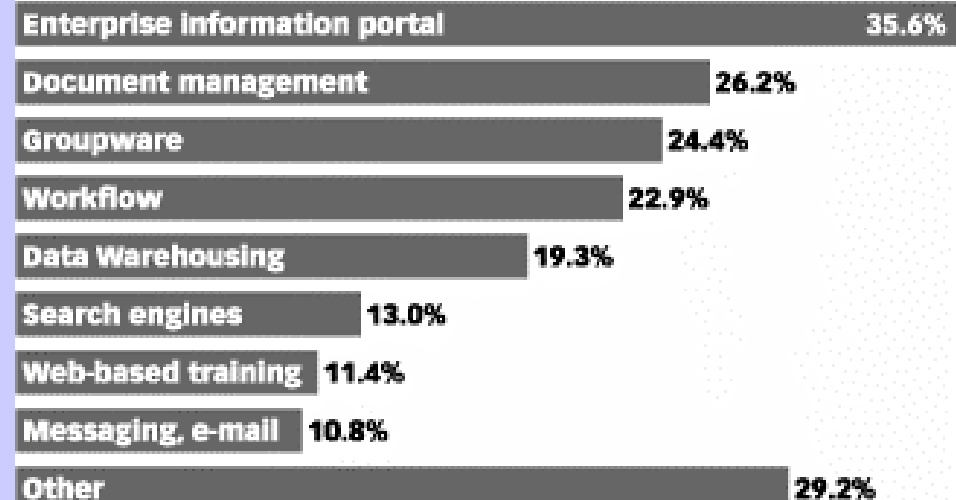
Note: Based on IDC and Knowledge Management Magazine survey of 566 individuals

Source: International Data Corp.; Knowledge Management Magazine, 2001

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Software Budget Allotments for Knowledge Management, 2001



Note: Based on IDC and Knowledge Management Magazine survey of 566 individuals

Source: International Data Corp.; Knowledge Management Magazine, 2001

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Spending on services related to KM

IDC forecast

Worldwide Knowledge Management Services Spending, 2000 & 2005 (In billions)

2000

\$2.3

2005

\$12.7

Note: *CAGR 41%

Source: International Data Corporation (IDC), June 2001

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Oh where, oh where has the
knowledge gone?

An ENTERPRISE perspective



ENTERPRISE PORTAL

Integrated [*Content or Document*] Management

Document
Management

Repository

Digital Asset
Management

Personal Productivity

Content/Catalogue
Management

**Workflow/
BPM**

Records/Image
Management

Enterprise Collaboration

Data Warehousing

Enterprise Application Integration

ERP, CRM, Training, Production/Ops, etc.

Supply-Chain Integration/Collaboration

Infrastructure/security services



ENTERPRISE PORTAL

Integrated [*Content or Document*] Management

Integration

Enterprise

Using

Data

SEARCH?

Supply-Chain Integration/Collaboration

Infrastructure/security services



ENTERPRISE PORTAL

How Global IT Executives Describe Their Company's Enterprise Portal, 2003 (as a % of respondents)

Online access to information and functionality of each enterprise application provided through a unique interface

15.8%

Online access to information and functionality of each enterprise application provided through a consolidated interface

84.2%

Note: n= 397 IT executives

Source: Line56 Research, March 2003

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Toward the integration of DM/CMS: who uses what?

20% of >\$500M
companies WW
have 10+ CMS
systems installed

81%

83%

70%

66%

Content Management Solutions Used by Companies Worldwide, 2003 (as a % of respondents)

Document Management (DM)



Web Content Management (WCM)



Records Management (RM)



Digital Asset Management (DAM)



■ Currently use

■ Will use

Source: Yankee Group, August 2003

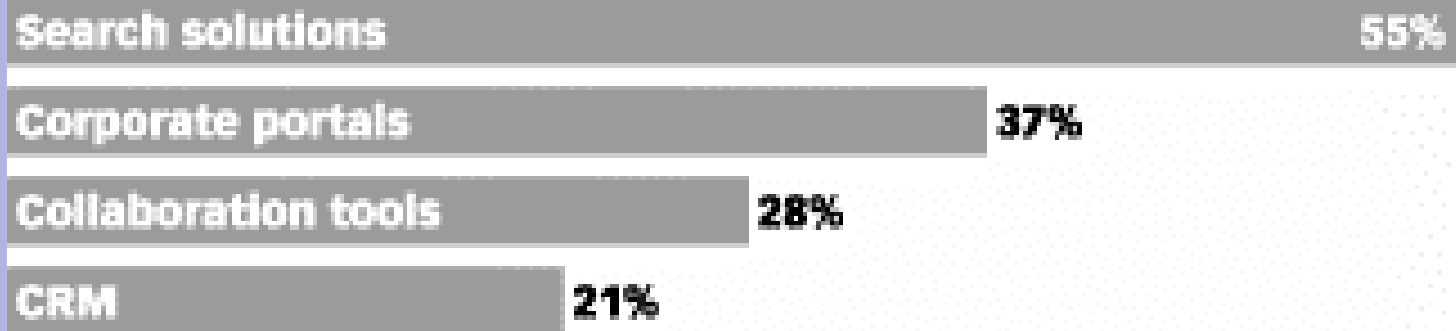
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CM integration with other apps

Businesses Worldwide that Integrate Web Content Management with Other Enterprise Information Management Applications, 2002 (as a % of respondents)



Source: Yankee Group, October 2002

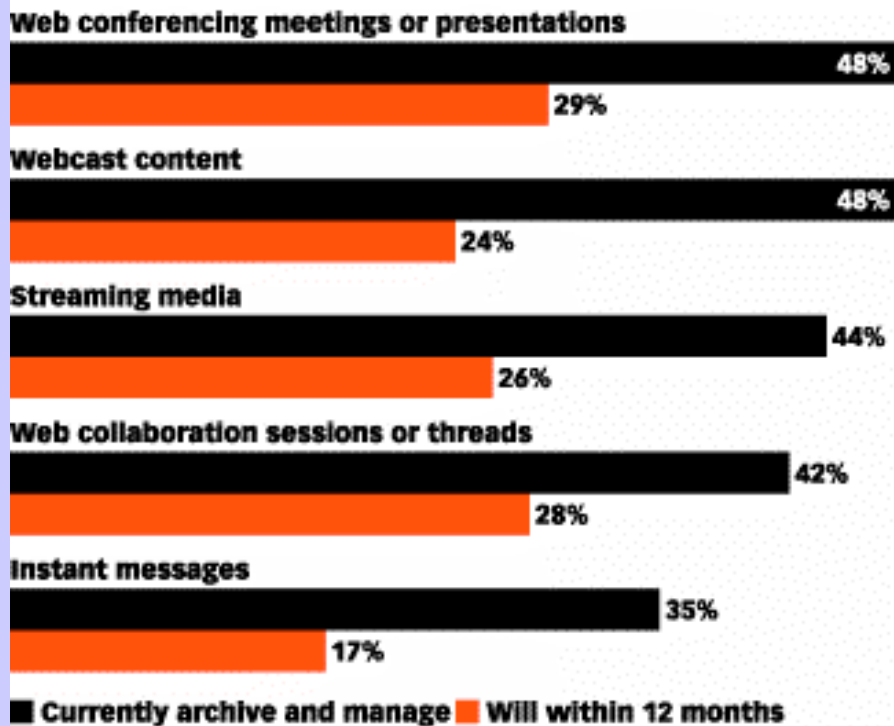
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Content managed in collaborative apps...and collaboration in CM

US Businesses that Manage Content Using Collaborative Applications, 2003 (as a % of respondents)

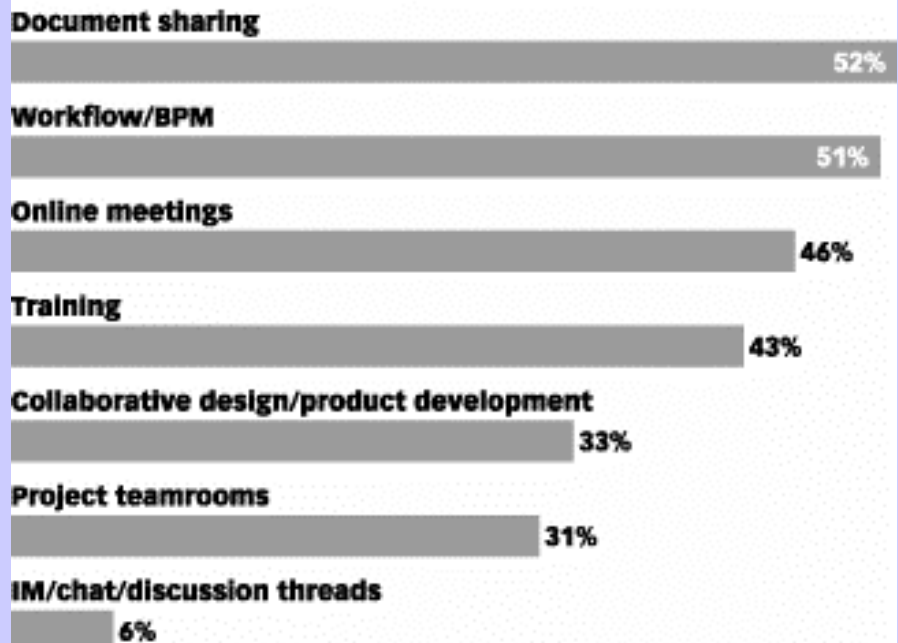


Source: Yankee Group, October 2003

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Role that Collaboration Plays in Enterprise Content Management According to Companies in North America, 2003 (as a % of respondents)



Note: n=81

Source: Forrester Research, September 2003

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Lots of double counting...no wonder we are confused about the “market”

- **ECM** (GIGA – 2001)
 - DocMan - \$780M
 - WCM - \$710M
- **CM** by segment (META - 2004)
 - B2E - \$1B
 - B2C - \$4B
 - B2B - \$5B
- **“Secure CM”** apps (IDC – 2005)
 - Web filtering - \$600M
 - Email scanning - \$505M
- **Enterprise Portals**
 - \$1.13B (Delphi - 2004)
 - \$3.1B (IDC - 2006)
- **Enterprise Search** (Ovum – 2006)
 - Software - \$1B
- **CMRA** (CM, Retrieval & Access) (IDC – 2006)
 - Software - \$2M



ENTERPRISE PORTAL

Integrated [*Content or Document*] Management

Integration

Enterprise

Using

Data

...still we
SEARCH
for knowledge

Supply-Chain Integration/Collaboration

Infrastructure/security services



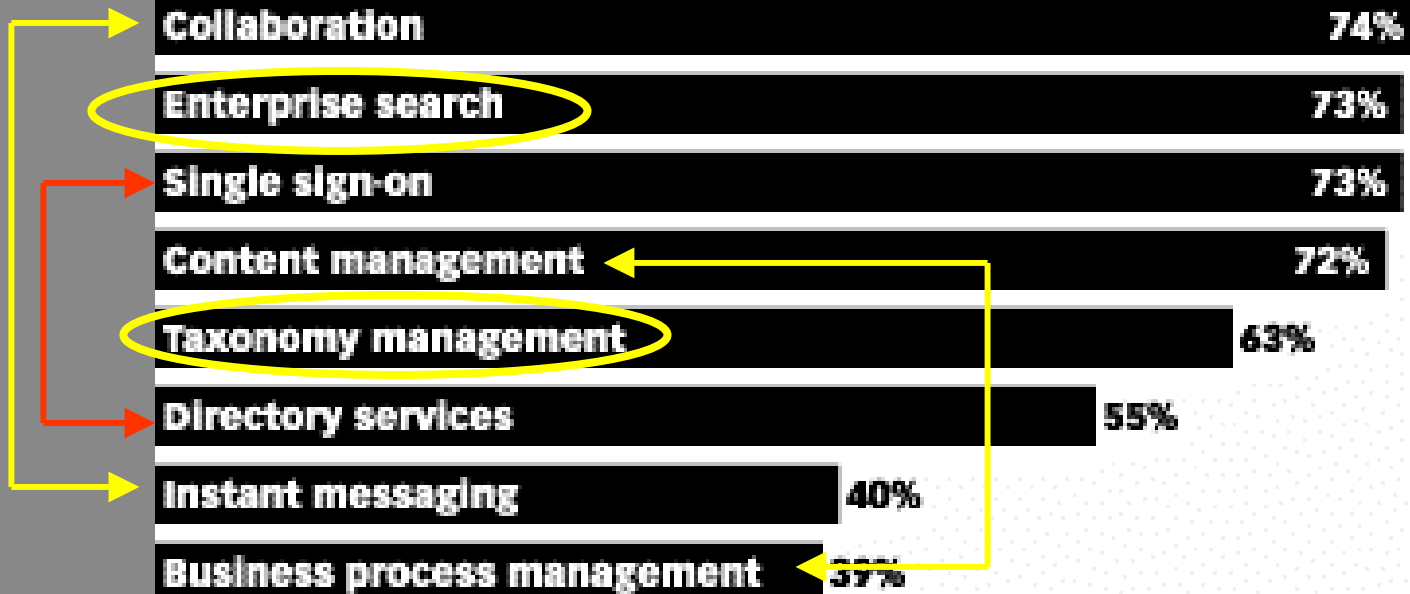
ENTERPRISE PORTAL

Apps

Infr. Services

something new

Leading Functions that Enterprises Want to Be Included in Portal Software, 2002 (as a % of respondents)



Note: n=500 enterprise software buyers
Source: Delphi Group, December 2002

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“Meaning” based services for next-generation information systems

[Viewpoint – IDC]

- Direct answers to direct questions (not a list of documents)
- Broad topic-coverage
- Trends and patterns across multiple information sources
- Discreet, personalised alerts & summaries
- New foundation for information gathering and decision-making



Proposition: there's no such thing as KM – only Knowledge Services?

- Taxonomy/ontology development and management
- Categorisation, clustering, indexing
- Search
- Text mining, extraction, summarisation
- Knowledge discovery
- Visualisation



The opportunity for LangTech developers

- Not infrastructure, not applications
- Embedded Knowledge Services
- In hybrid apps,
- In unified DB/DM/CM/AM/RM environments,
- In Web Services
- In multiple languages AND cross-lingually!



Thanks!

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