

Enterprise Content Management Market with COVID-19 Impact by Business Function, Component (Solutions (Document Management, Record Management, eDiscovery), Services) Deployment Type, Organization Size, Vertical and Region - Global Forecast to 2026

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Abstracts

MarketsandMarkets estimates the global enterprise content management market size is expected to grow at a Compound Annual Growth Rate (CAGR) of 9.8% during the forecast period, to reach USD 37.7 billion by 2026 from USD 23.6 billion in 2021. Key factors that are expected to drive the growth of the market are the rising demand to meet regulatory compliance standards and audit management with improved visibility and control to strengthen corporate information governance, enhance security and optimize business processes with automated workflows and streamline business processes by eliminating repetitive manual tasks. These factors are driving the demand for enterprise content management.

The COVID-19 Impact on the global enterprise content management tools market

The pandemic has had a positive impact on the enterprise content management market. The COVID-19 pandemic and the proliferation of remote work environments have created new complex barriers for businesses to overcome. The unprecedented outbreak of the novel virus sent many businesses scrambling to quickly find a document management solution that simplifies and streamlines their business operations. ECM solutions provide access to business-critical information regardless of location - whether that be in the office or working remotely. Organizations across different verticals are leveraging ECM solutions to increase workflow efficiency, storage, security, compliance,

and simplify the flow of business information in areas such as accounts payable, accounts receivable, human resources, and contract collaboration.

The services segment is expected to grow at a higher CAGR during the forecast period

Based on services, the ECM market is segmented into two categories: professional and managed services. These services assist in building, assessing, and leveraging ECM environments to avoid time wastage and effort on a failed implementation. Enterprises need active support from skilled professionals to minimize their downtime during the pre- and post-installation of ECM solutions. These services provide the necessary support to uphold the efficiency of business processes, increase enterprise growth, and reduce unwanted operational expenses.

IT and ITeS industry vertical to hold the highest market share in 2021

IT and ITeS is one of the fastest-growing verticals with respect to the adoption of advanced technologies and services due to the enormous volume of content and documents. IT service providers handle the critical data from various industries, such as BFSI, healthcare, education, and government & defense. The companies have to follow security standards and regulations such as HIPPA standards in healthcare, PCI DSS standards for credit card-related information, GLBA, SOX/J-SOX, NCUA, data privacy, and data residency laws. Companies require high-security infrastructure to manage these standards. Hence, they are adopting enterprise content management for managing IT service delivery to enhance the customer experience.

APAC to grow at the highest CAGR during the forecast period

Asia Pacific has witnessed the advanced and dynamic adoption of new technologies and is projected to record the highest CAGR during the forecast period. In addition, the IT spending across organizations in the region is gradually increasing, which is projected to lead to a surge in the adoption of ECM software solutions. China, Japan, and Australia and New Zealand (ANZ) are the leading countries in terms of the adoption of enterprise content management software solutions and services in the region. While the expenditure on technology solutions in APAC has increased, a setback is witnessed due to the recent COVID-19 pandemic. The COVID-19 pandemic makes it more urgent for business leaders across APAC to increase their rate of cloud adoption and digital transformation. Also, the current pandemic has forced the government and public sector across APAC to shift toward digital innovation and meet regulatory compliance standards, which is driving huge market opportunities for ECM vendors.

By Company: Tier 1–34%, Tier 2–43%, and Tier 3–23%

By Designation: C-Level Executives–50%, Director Level–30%, and Others–20%

By Region: North America–30%, Europe–30%, APAC–25%, MEA – 10%, and Latin America – 5%

The ECM market comprises major providers, such as Microsoft (US), OpenText (US), Hyland (US), IBM (US), Laserfiche (US), Box (US), Oracle (US), SAP (Germany), Newgen Software (India), Micro Focus (UK), M-Files (US), iManage (US), Ascend Software (US), DocuWare (US), Xerox (US), Objective Corporation (Australia), KYOCERA Document Solutions (Japan), Fabasoft (Austria), SER Group (Germany), GRM Information Management (US), DOMA Technologies (US), Systemware (US), Adobe (US), Veeva (US), and Atlassian (Australia). The study includes an in-depth competitive analysis of key players in the ECM market with their company profiles, recent developments, COVID-19 developments, and key market strategies.

Research Coverage

The report segments the global enterprise content management market by business functions into four categories: Human Resource, Sales and Marketing, Accounting and Legal, and Procurement and Supply Chain Management. By component, the ECM software is segmented into two categories: solutions and services. By vertical, the ECM market has been classified into banking, financial services and insurance (BFSI); retail and consumer goods; energy and utilities; government and public sector; healthcare and life sciences; IT and ITeS; manufacturing; media and entertainment; telecommunication; and others. By region, the market has been segmented into North America, Europe, APAC, MEA, and Latin America.

Key benefits of the report

The report would help the market leaders/new entrants in this market with the information on the closest approximations of the revenue numbers for the overall enterprise content management market and the subsegments. This report would help stakeholders understand the competitive landscape and gain insights to better position their businesses and plan suitable go-to-market strategies. The report would help stakeholders understand the pulse of the market and provide them with information on the key market drivers, restraints, challenges, opportunities, and COVID-19 impact.

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*Details on Business overview, Products/Services offered, Recent developments, COVID-19 developments, MNM view, Key strengths/Right to win, Strategic choices made, and Weaknesses and competitive threats might not be captured in case of unlisted companies.

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