



The New, Open Face of Content



Matt Asay
Vice President, Business Development
Alfresco



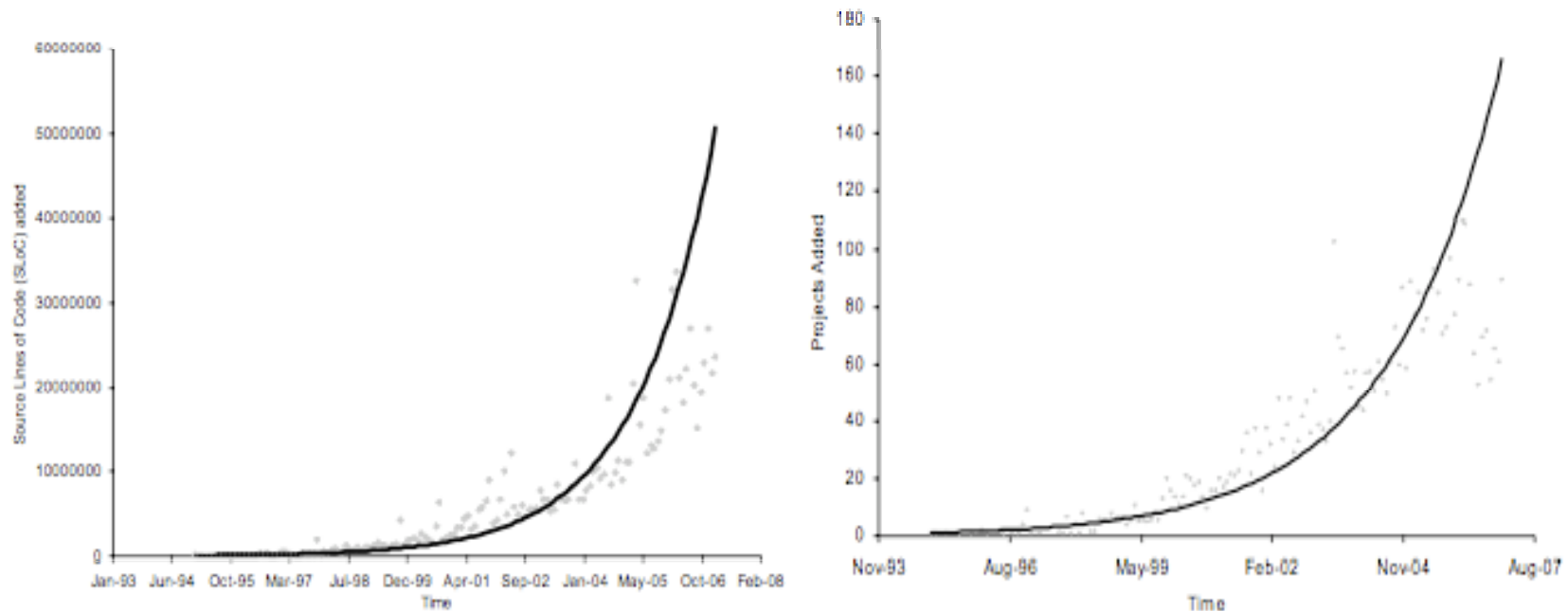
I Bring Good News





Open source is *everywhere*

Whether measured in terms of lines of code added or new projects, open-source growth is phenomenal



Source: Dirk Riehle, SAP Research, 2009

THE WALL STREET JOURNAL.

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WSJ.com

WSJ.com

Jobless Rate Tops 8%, Highest in 26 Years

Some Economists See Index Reaching 10% This Year as Layoffs Sweep Construction, Services; 'Companies Just Didn't Hire'

By **Karen Egan**

The U.S. unemployment rate jumped last month to its highest level since 1982, and the job market remains higher as economists bet on a sustained drop in consumer demand.

The number of jobless Americans rose to 37 million in February, pushing the unemployment rate to 8.1%, up from 7.6% in January, said the Labor Department.

"We're far at 10% unemployment by year end," said Joseph Sabatino, chief U.S. economist at Deutsche Bank. "What's going to stop it?"

The U.S. has lost 4.8 million jobs since the recession began in December 2007, more than half the losses during the last four months of the worst recession in U.S. history, says economist for the economy's chief statistician.

The number of jobless Americans rose to 37 million in February, pushing the unemployment rate to 8.1%, up from 7.6% in January, said the Labor Department.

saying more job cuts to come. A quarter-million construction and manufacturing jobs vanished. The service sector shed 270,000. Only health services and government kept out job growth.

The biggest group of unemployment, which includes part-timers seeking full-time jobs, is 14.8% last month.

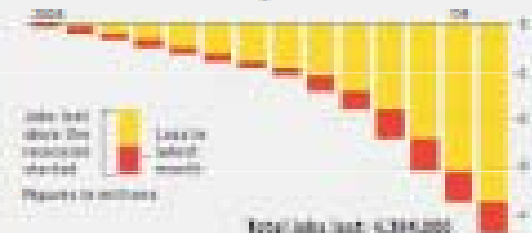
The labor market has slowly been a lagging indicator of activity, which means that even if the economy were to recover soon, the jobless rate is likely to climb for many more months. While an immediate end to the layoffs is unlikely, the current quarter seems on track to fall to 7% or more after a 0.2% decline in the fourth quarter of 2008 — the jobless rate is likely to get closer.

President Barack Obama's \$787-billion stimulus package in October could help to ease the jobless rate.

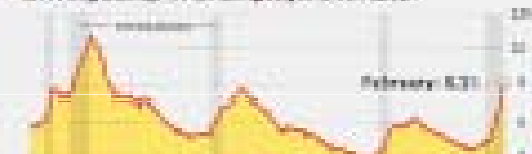


The U.S. has lost 4.8 million jobs since the recession began in December 2007.

Positions Are Vanishing Fast ...



Driving Jump in Unemployment Rate

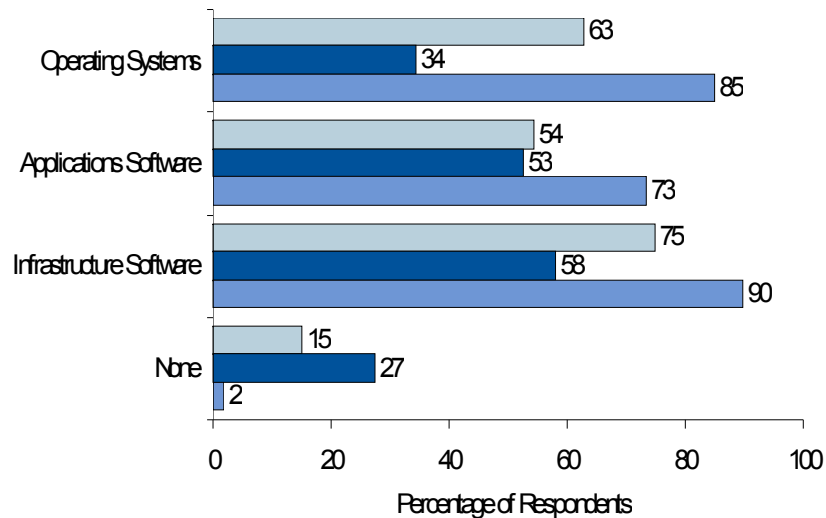


IDC: Open source revenue to grow by 22.4% CAGR to reach \$8.1B by 2013...
 ...which means more € earned by Alfresco partners and more € saved by Alfresco customers



Open source: Adoption is accelerating

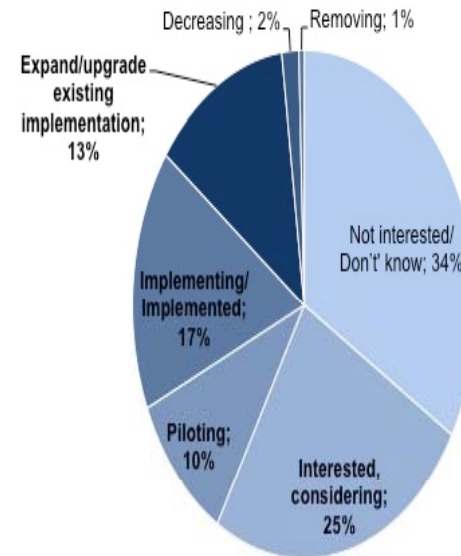
Survey Question: Do you use, or plan to use in the next budget year, an open-source project or product as an alternative to commercial software?



Legend:
 □ Currently Using in This Budget Year
 ■ Plan to Use in Next Budget Year
 ■ Currently Using and Plan to Use in Next Budget Year

Source: Gartner 2008
 Number of respondents = 274; Multiple responses allowed.

“What are you firm’s plans to implement or expand its use of open source software in the next 12 months”



Base: 2,227 software decision makers at North American and European enterprises.

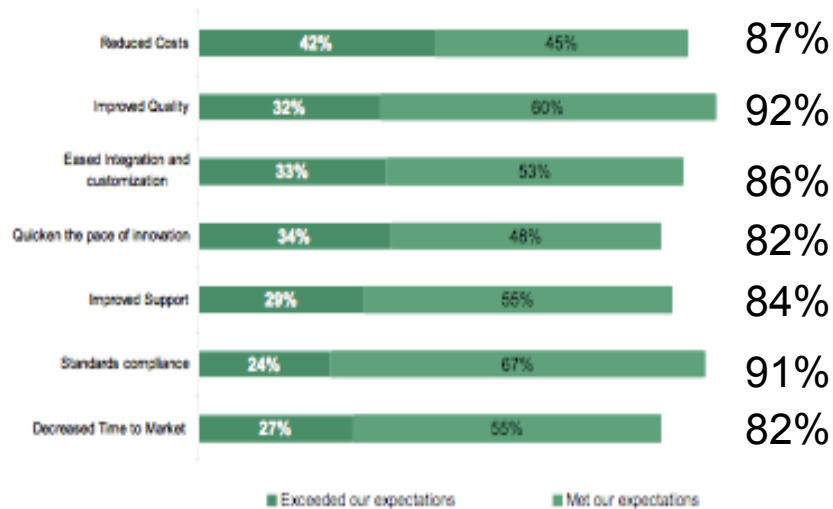
Source: Enterprise And SMB Software Survey, North America And Europe, Q4 2008

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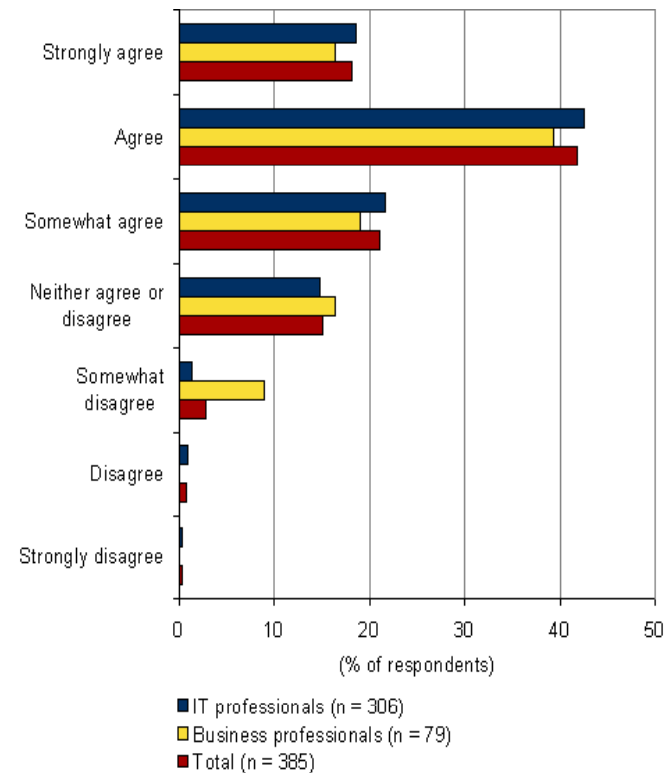
~100% to adopt open-source by 2010

"How has open source software met your organization's expectations in the following areas?"



Base: 102 Senior Business & IT Executives involved in the decision making for open source software technology and related services in large enterprises. Western European OSS Online Survey conducted by Forrester Consulting and commissioned by BULL, September 2008

"Open source produces better software"

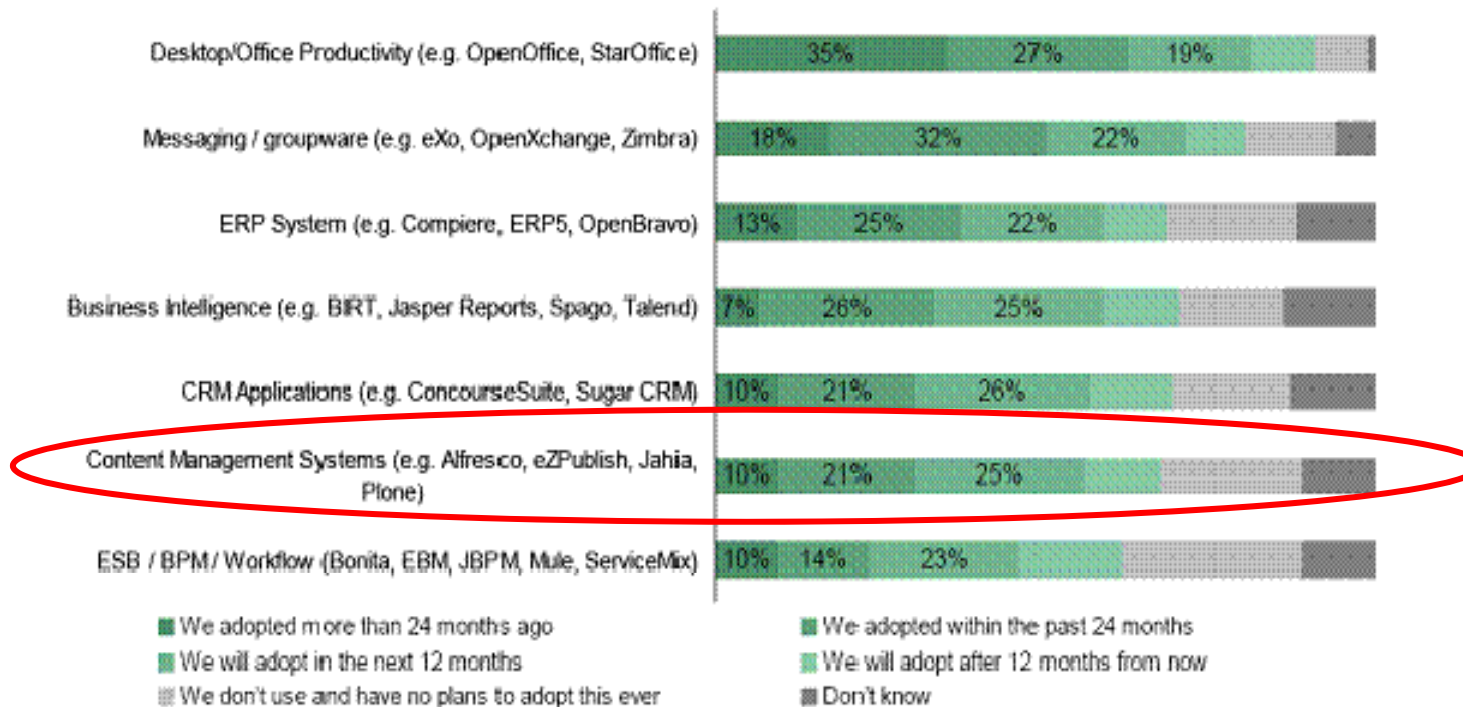


65% say "open source has sparked innovation" within their companies...at lower cost



What about open-source CMS adoption?

"Has your organization adopted or does your organization plan to adopt open source software within each of the following BUSINESS APPLICATION CATEGORIES?"

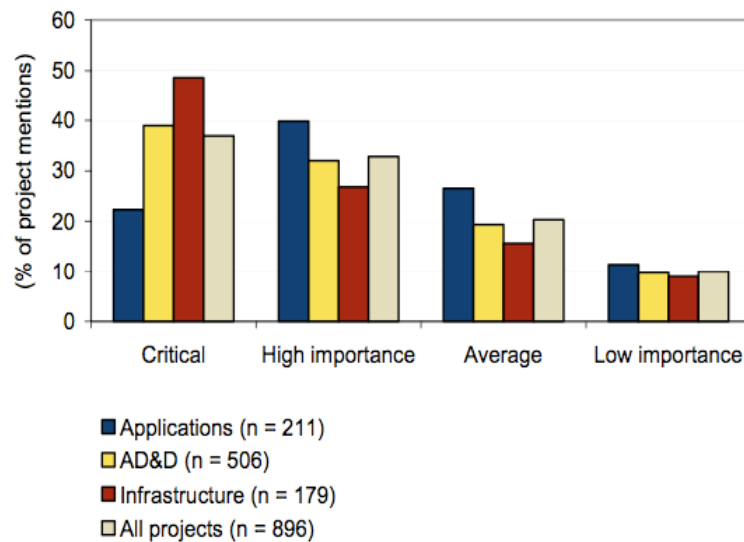


Base: 102 Senior Business & IT Executives involved in the decision making for open source software technology and related services in large enterprises. Western European OSS Online Survey conducted by Forrester Consulting and commissioned by BULL, September 2008

56% to adopt an open-source CMS by 2010

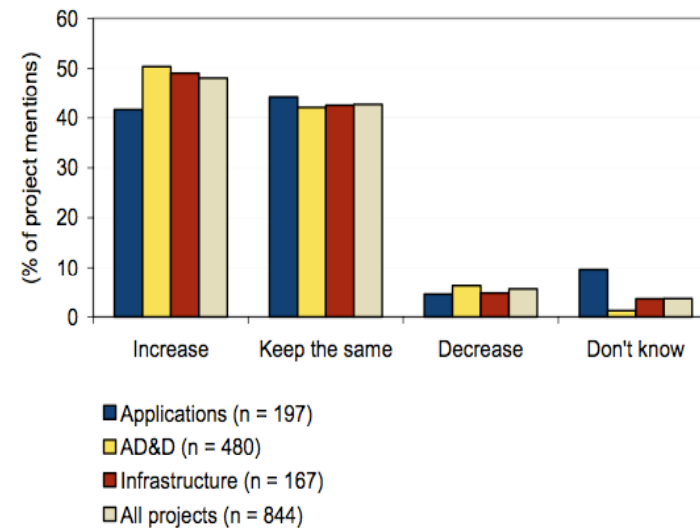
Source: Forrester, 2009

Projects' Importance by Primary Software Market



Source: IDC's 2007 Industry Adoption of Open Source Software Survey

Planned Project Activity Level by Primary Software Market



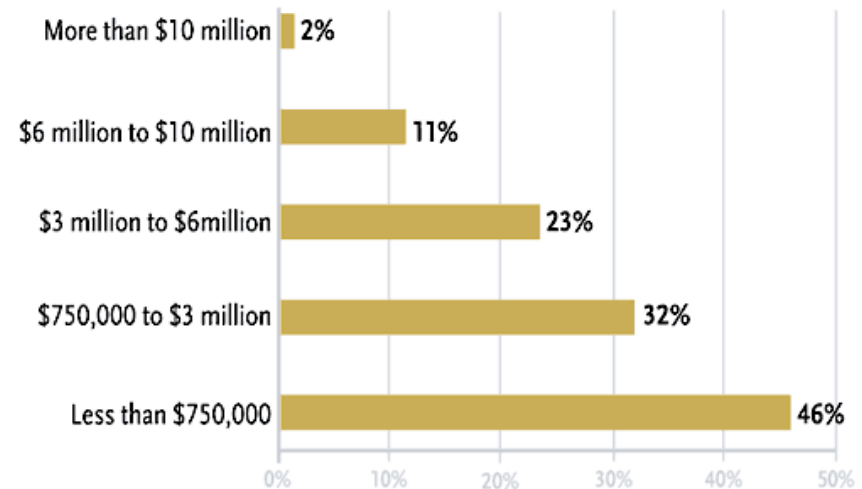
Source: IDC's 2007 Industry Adoption of Open Source Software Survey

Open source is used for the most demanding applications. Proprietary = commodity

- Most IT projects fail
- Open source de-risks software acquisition:
 - Try before you buy
 - Stop your subscription if the vendor stops providing value
 - Dramatically lower cost
- Worst case:
 - Project dies and you're out \$xx,xxx or \$xxx,xxx, not \$x,xxx,xxx
- IT project failure becomes less probabilistic and less painful

Project Success

Smaller initiatives fare better at reaching goals than larger projects do.



SOURCE: THE STANDISH GROUP



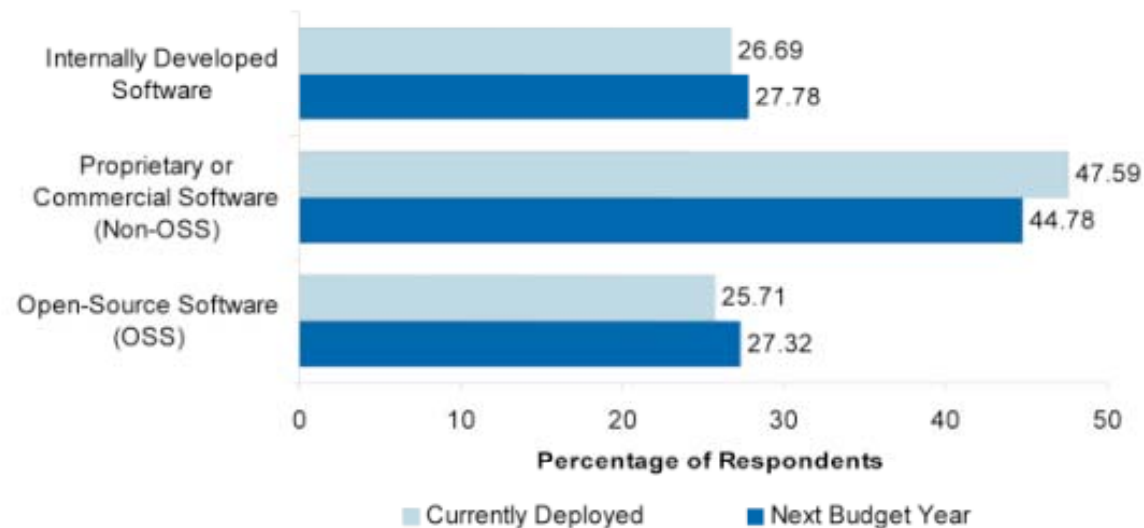
So what will this do to your
proprietary vendors?





OSS Percentage of Deployed Software Grows, While Proprietary Software Declines

Survey Question: What percentage of your organization's currently deployed software (applications and infrastructure) is/will be classified into each of the following categories?



Number of respondents = 262, Mean

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Gartner.





Their response?

More content + fewer vendors = high cost





The Antidote





Alfresco is different

Lower Cost



Simplicity



Choice





Introducing Alfresco

Open

100% Open source; 100% open standards

Source

Superior ease of use, 5-10x performance at 1/10th the cost

Enterprise

Well-funded (Accel, Mayfield, SAP)

Content

Documents, records, XML, web pages, images, rich media, code ...

Management

World's most experienced management and engineering team in content management from Documentum, Interwoven, Vignette



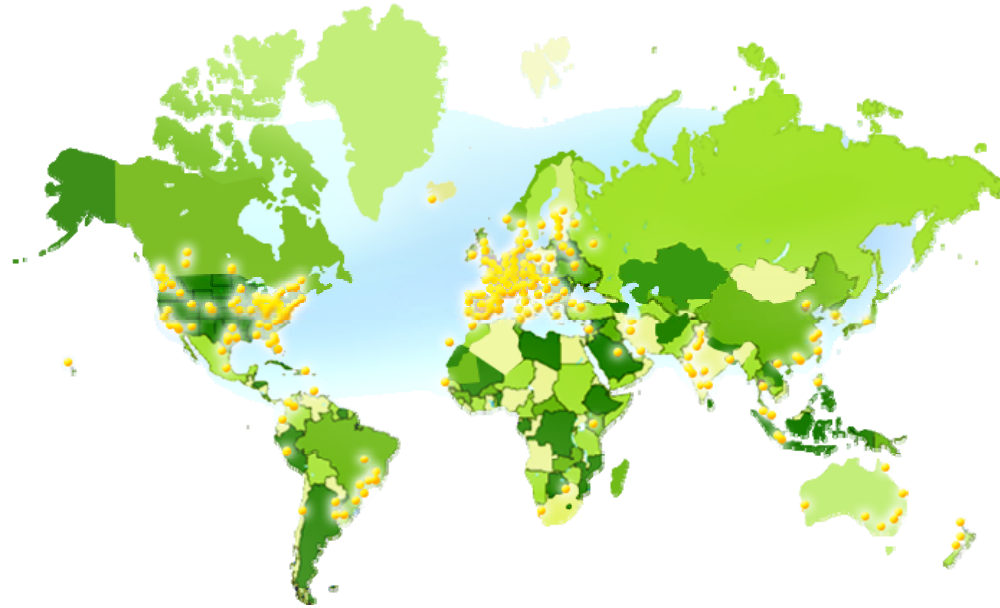
Massive market momentum over 3 years

1.9m Downloads

- 100,000 community members
- 50,000+ live sites
- 150 Forge applications

1,000+ Customers

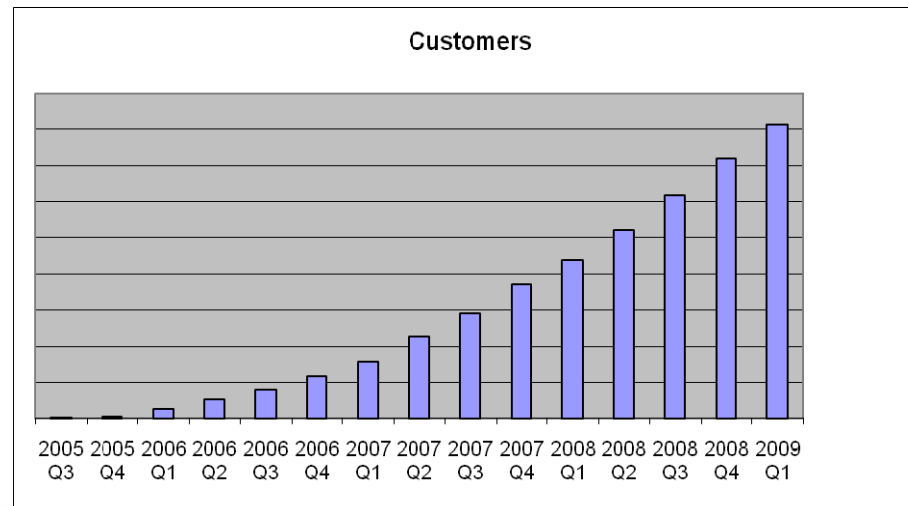
- Major Banks, Governments
- Media, Publishing, Education
- Adding 100+/quarter



300% growth for 2 years

Market Buzz

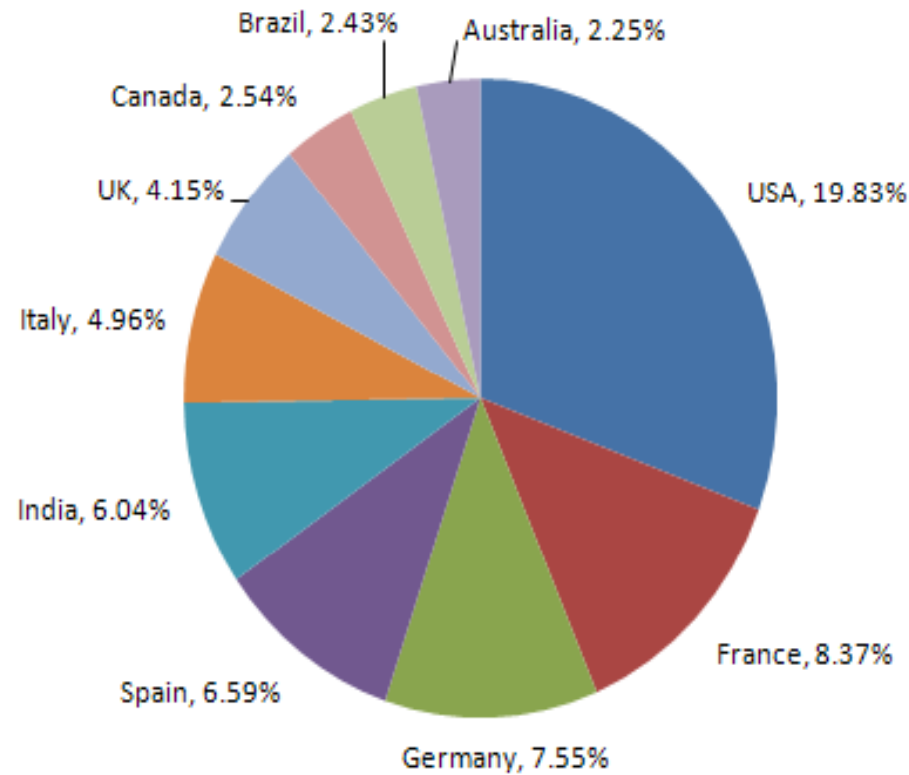
- Greater web activity than EMC Documentum, Interwoven and OpenText





Alfresco is a global community

Alfresco Community Members Top 10 Countries

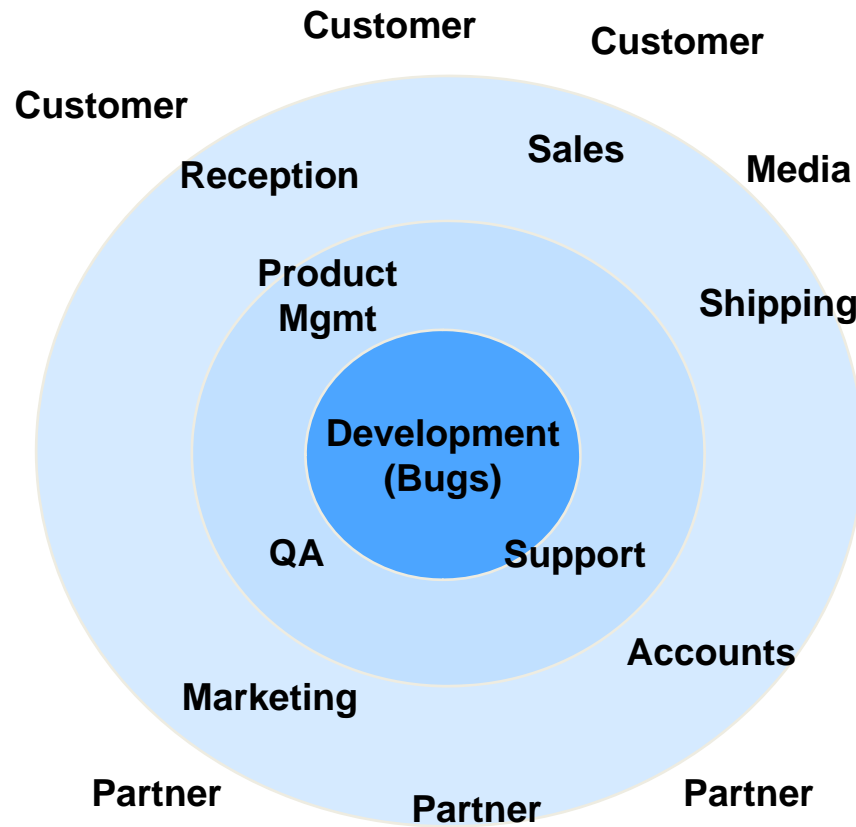


US is Largest Individual Country
But Europe is 2.5x US (Need more Ronaldo!)
211 Countries



Innovation at lower cost: Leveraging the open-source model

Closed



Open





What the analysts say

Peter Morris, Program Manager

“Alfresco offers **similar levels of functionality, security and quality** to all the major ECM vendors, **but at a tenth of the cost** due to their open source pricing model”



Mike Davis, Senior Analyst

“[Alfresco] has the technical capabilities, and along with Microsoft is likely to be the most disruptive player in the ECM market at the enterprise level in the next five years.”

Kyle McNabb, Senior Analyst

“The collaboration piece Alfresco Share is helping to signal **the end of today's definition of ECM.....**”



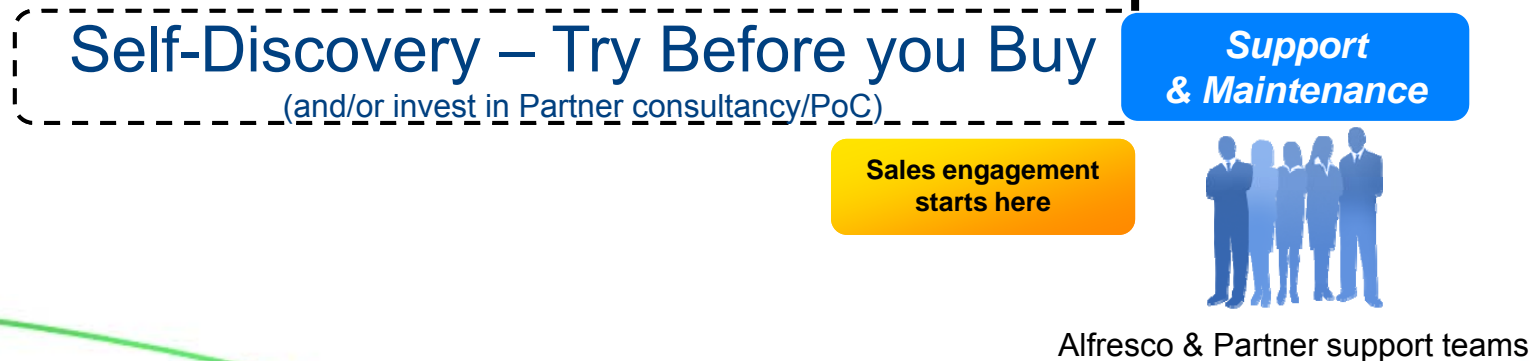


Open source vs proprietary: A different sales approach

- **Traditional** Enterprise Software Vendors

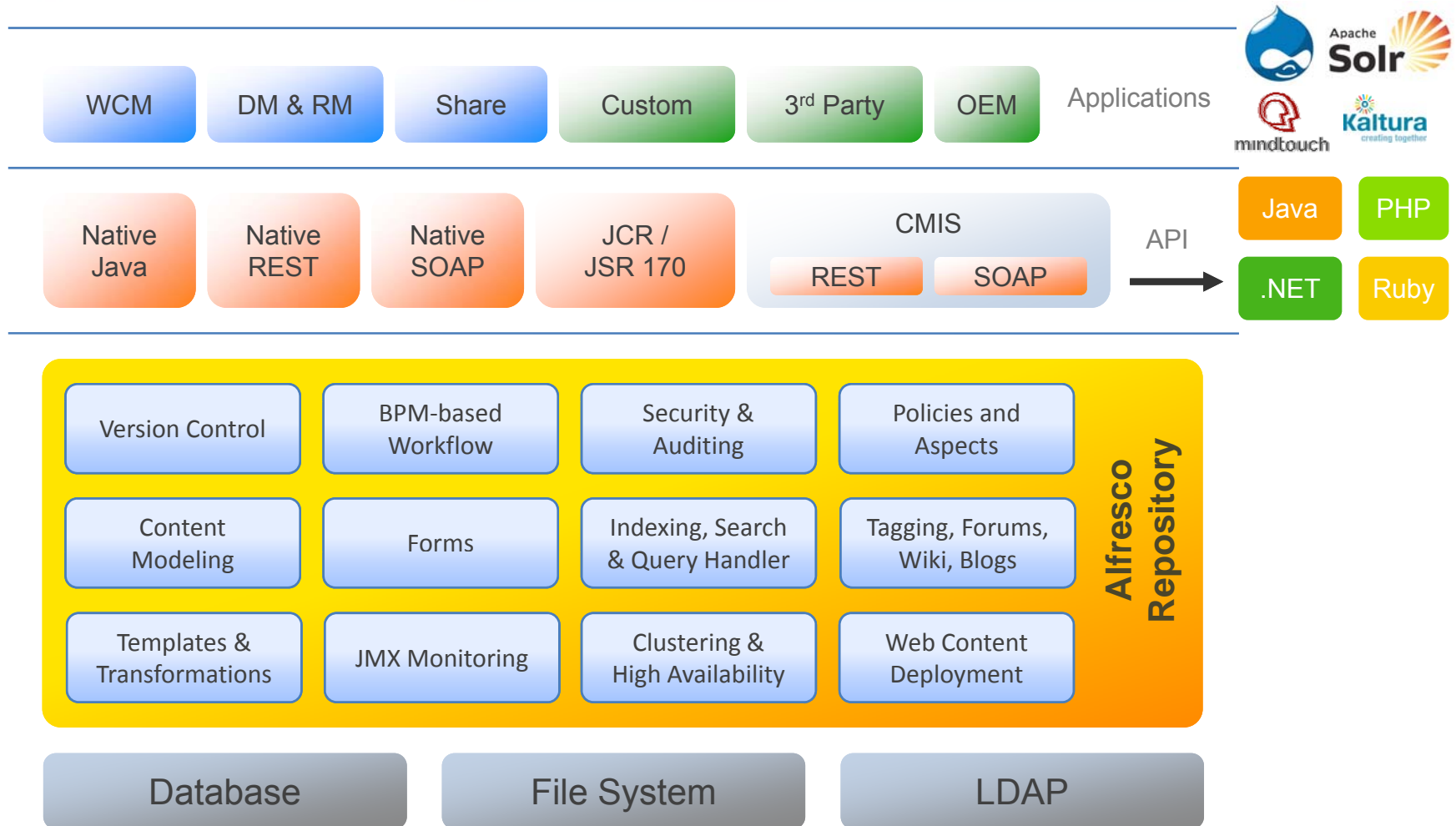


- **Alfresco's** Open Source Approach



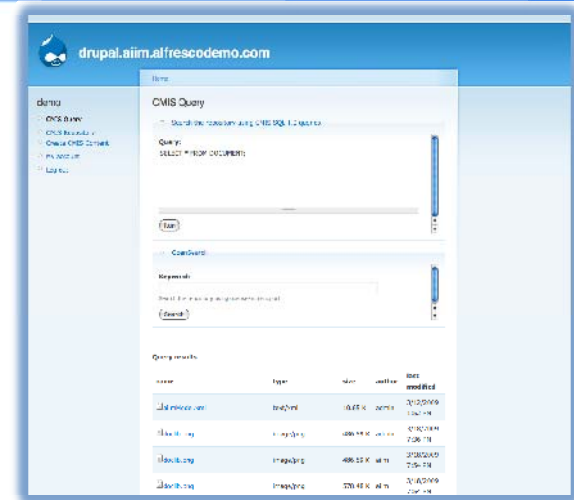
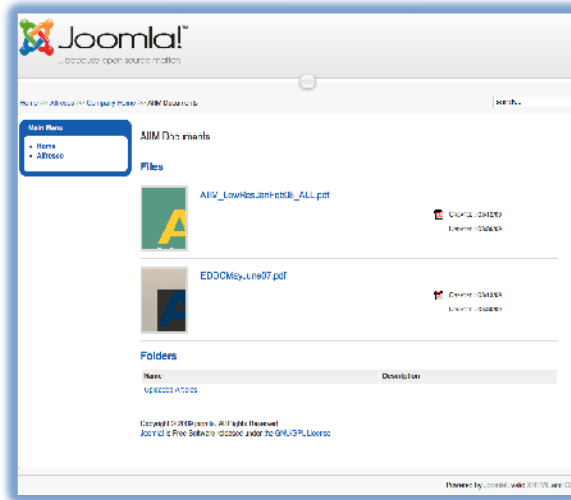
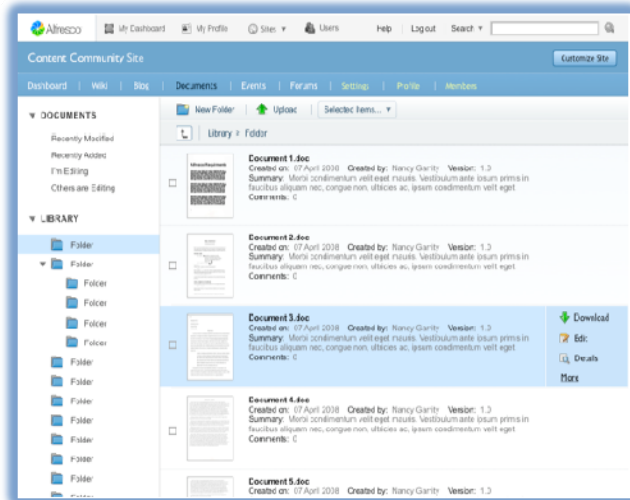


Best of breed technologies and open standards

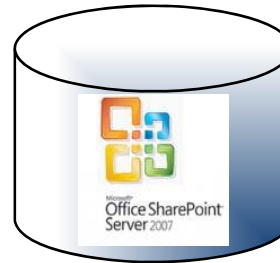
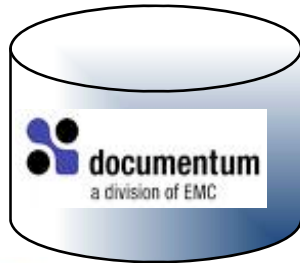




CMIS & vendor interoperability



CMIS Content Application



...



What Does this Mean for You?





It means...

- ...A super-scalable (Adobe), cost-effective (Activision), very flexible (Morgan Stanley) content application server/platform
- ...A chance to buy what you need, when you need it (support, certified software)
- ...A company committed to ensuring the success of your critical projects, 24/7/365





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twitter | twitter.com/mjasay

blog | cnet.com/openroad





Bill Brooks
Sales Manager, Spain and Portugal
Alfresco Software
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Alfresco in 2 mins...

- **Leading Open Source Enterprise Content Management**

- Document Management
- Web Content Management
- Content Collaboration
- Repository Services

- **Competes with:**

- EMC Documentum, IBM FileNet, OpenText in Document Management
- Interwoven, Vignette in Web Content Management
- Microsoft SharePoint, IBM Lotus in Content Collaboration

- **Core Differentiation**

- Fast, responsive platform for content applications
- Open source for community development and no lock-in
- Innovation and first implementation of new CMIS standard
- Most experienced team in ECM
- Enterprise Support and Partner Services





Product Overview





- Easy to Use interfaces
- Simple to Program, Open Standards
- Platform agnostic
- Highly Scalable repository –no artificial bottlenecks
- Flexible Records Management framework
- Mobilize your workforce for greater productivity
- Single logical repository for all content types (documents, images, video, web 2.0 content, records, emails)
- Future proof your content applications with CMIS and the best and open source implementation
- Save lots of money through Open Source
 - See: <http://www.alfresco.com/products/whitepapers/>
 - TCO White Paper demonstrates 96% cost reduction using US Government GSA Schedule 70 dat





Alfresco : What we do Enterprise Content Management

Document Management
Capture, Share and Retain Content



- [Learn More and Test Drive](#)

Web Content Management
Engage Through Content



- [Learn More and Test Drive](#)


Collaboration
SharePoint® Alternative



- [Learn More and Test Drive](#)

[Client Applications](#)
[Alfresco Content Services](#)
[Alfresco Repository](#)

Alfresco Content Platform
Content-as-a-Service from the most scalable Java Content Repository
– Clustered, federated and replicated. [Learn More](#)





Document Management

The screenshot displays the Alfresco Document Management interface. On the left, a Windows Explorer window shows the file system structure. The main interface is a web browser window displaying the Alfresco Share site. A modal dialog titled "Upload File(s)" is open, showing a list of files being uploaded with their progress percentages and "Remove" buttons.

Progress	File Name	Action
100%	SPK core UI detsgn connections view rev8 rolodex view	Remove
100%	SPK core UI detsgn networks view rev8 rolodex view	Remove
100%	SPK core UI detsgn connections view rev8 rolodex view	Remove
61%	SPK core UI detsgn activties view rev8.png (147 KB)	Remove
24%	SPK-visual-scamp-one-steel-high-contrast-black-col	Remove



Collaboration

The image displays three overlapping screenshots of the Alfresco web interface, illustrating collaboration features:

- Top Screenshot (Site View):** Shows the 'Collabor8 Concept Site' with navigation tabs for Site Dashboard, Wiki, Blog, Document Library, Calendar, Discussions, and Members. It includes options to 'Invite' and 'Customize Site'.
- Middle Screenshot (Blog Post View):** Displays a blog post titled 'Proin Metus Pellentesque' published on Wed 15 Oct 2008. The post content includes placeholder text and a 'Vivamus condimentum' section. It features a 'Create Post' button and a 'Configure Blog' link.
- Bottom Screenshot (Dashboard View):** Shows the 'Joe Bloggs Dashboard' with several widgets:
 - My Calendar:** Lists events like 'UI review' (15 Oct 2008), 'Team meeting' (13 Oct 2008), 'Usability Study' (16 Oct 2008), and 'Icon meeting' (17 Oct 2008).
 - My Site Activities:** Shows a timeline of activities for Oct 15, 2008, including document additions and discussions.
 - My Profile:** Displays user information for 'Joe Bloggs', Product Manager, including email, phone, and IM details.
 - My Sites:** Lists sites like 'Collabor8 Concept', 'Engineering', and 'Joe Bloggs'.
 - My Tasks:** Lists tasks such as 'Please give feedback on this scam' and 'Update to reflect discussion today'.



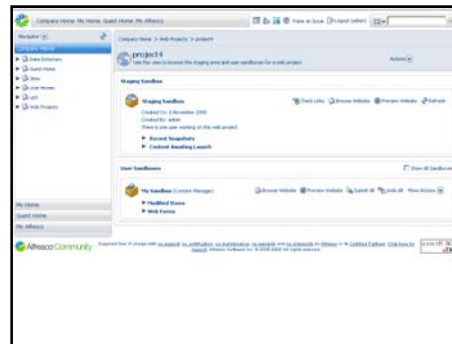
Alfresco WCM

Web Content Management

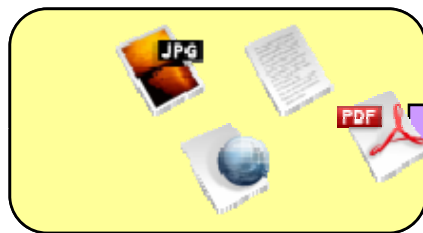
Flexible Content Generation



Alfresco WCM



Live Web Site



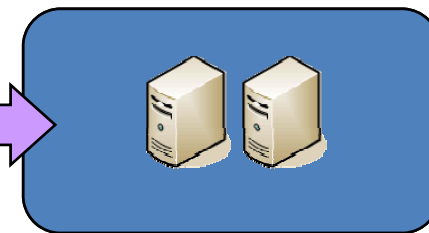
User Sandbox

Staging



Staging Sandbox

Approval & Deployment



Multiple Web Servers





Products and Protocols

Alfresco Share

Sites

People

Collaboration
Components

YUI

Alfresco Surf

Components

Pages

Templates

Alfresco
Document
Management
via
Microsoft Office

Alfresco
Web Content
Management

JavaServer
Faces (JSF)

Alfresco Repository

REST & Web
Services API

CMIS

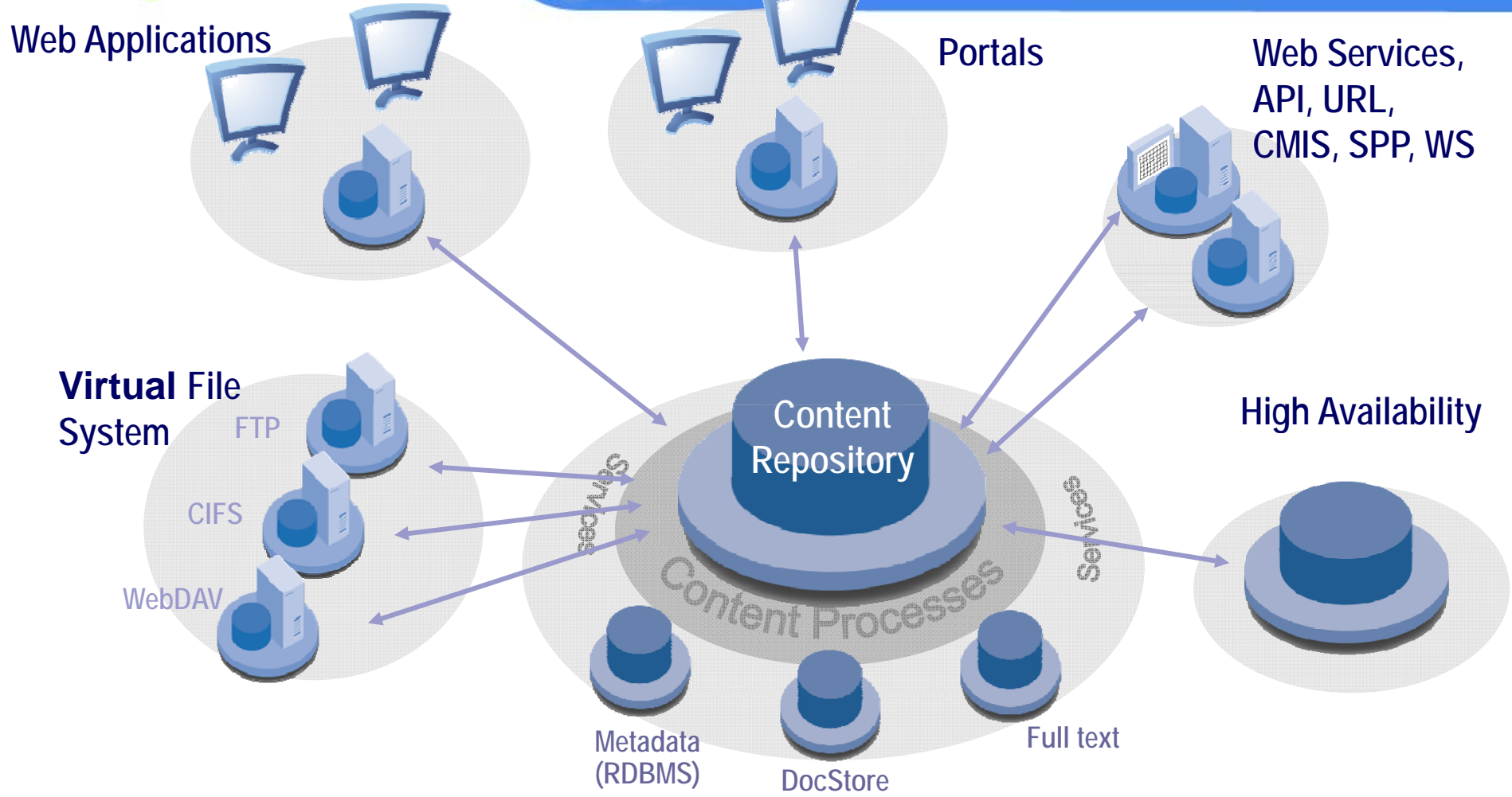
MS Office
SharePoint Protocol

CIFS, WebDAV,
FTP & NFS

Java



User Access / Interfaces





Community or
Enterprise





Compare Versions

-  **Alfresco Community**



- Free download, free usage, GPL
- daily “builds”, no service packs, no dedicated patches
- **NO** support through Alfresco or certified partners
- Only major releases (no maintenance releases)

-  **Alfresco Enterprise Edition**

- Annual subscription
- Product, support, maintenance, SLA
- Commercial license, warranty, certified
- Q&A, testing, benchmarking done by Alfresco
- Alfresco Network, Alfresco Call Tracking (ACT)
- Training & System Integration Services
- Enterprise features like easy clustering, JMX, easy database configuration



Enterprise Features

	 Alfresco [™] Community Edition	 Alfresco [™] Enterprise Edition
Platform Support	Single open source stack	Broad array of open source and proprietary stacks (Oracle, Microsoft, etc.)
Scalability/High Availability	Requires coding/some heavy lifting	Easy clustering and high-availability extensions needed to support large scale multi-server deployments
System Monitoring	N/A	Provided via advanced JMX-based tools allow access to database connection, memory usage information and dynamic server re-configuration
Multi-tenancy	N/A	Cloud-ready multitenancy support
Application Extensions (Certified)	N/A	Available and growing (e.g., Kofax integration)
Support/Maintenance	N/A	24/7/365 by the engineers who write the code. Continuous innovation



Alfresco Enterprise Subscription Why Pay ?

- Certified Alfresco Enterprise Releases
- Service Packs & Upgrade Support
- Technical Assistance
- Customer Portal & Issues Tracking System
- Certified Partner Network
- Enterprise-only deployment

Term	Proprietary Software	Alfresco
License Fees	Large Initial Fee	Included in annual subscription fee
Upgrades	Additional Fee	Included in annual subscription fee
Maintenance	Additional Fee	Included in annual subscription fee
Support	Additional Fee	Included in annual subscription fee
License Term	Perpetual or Time-Based	Perpetual*



- Alfresco Enterprise / Network subscription provides options from departmental / SMB implementations to corporate licensing arrangements
 - Entry Level
 - 1 cpu production (up to 4 cores), 1 cpu test and 1 cpu development from 16.125€ / year
 - Supports 100 concurrent users
 - High Availability
 - Application and Site licensing options





Partner Services



- Implementation Services and 1st line support done by partners
 - Local language
 - Regional offices
 - Domain knowledge
- Partners work with customer implementation team
 - Alfresco specialists
 - Consulting
 - Training





Customer Examples and References





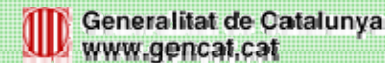
Government



MINISTÈRE DE LA JUSTICE

- French Ministry of Justice
- Alfresco selected as Standard DM platform for ALL Content Management Applications
- DM / Imaging / Workflow of documents in +200 French Courts (de-centralised application, each court runs its own Alfresco server)
- Up to 70 000 users

- Spanish Autonomous Government
- Dept document management, On-line citizen portals, content repositories
- Mixture of centralised / distributed implementation



- Alfresco selected as ECM platform for CIRCA-BC application which allows widespread collaborative groups to share information and resources in private workspaces over the web
- <http://ec.europa.eu/idabc/en/document/7400>
- Target : 70 000 users over 27 member countries (centralised application developed and managed by EU Commission)
- CIRCA-BC also available as an OS application

Private Organisations





Document / Record Management



- Basic Content Services for **+50 000 employees**
- **Deployed centrally in Data Centers**
- Access via Intranet / Portal

- French Air Force – 65,000 personnel, 560 Aircraft
- Renodoc – Stock and distribution technical documentation, procurement catalogs, Coordination of experts and officers, Rolling out to 30,000 users
- Alfresco: Simple to install, Open, Flexibility



- ECM for « trading applications »
- Integration with Mainframed-based business application
- Rolling out to **5 000 users** across Lux, France & Germany
- **Alfresco servers in Data Centers**



Collaborative Content Management



- **Application: DM/Collaboration + WCM**
- 55 000 users
- Why Alfresco? Open Standards, OS model
- Competition : OText & MOSS

- CRIX – Consortium of over 20 leading pharma companies including Merck, Eli Lilly, AstraZeneca, Pfizer and Novartis
- Secure standards-based electronic information exchange for clinical research
- Alfresco – Lower transaction fees, reduce human error, established standard, Lower transaction costs



Deutsche Bank



- **DCTM replacement**
- First project for 200 managers



Content Services / Community



- Adobe - \$3Bn software vendor
- Powering Acrobat.com (Tens of millions of users, terabytes of data)
- Benefits - Standards based, Superior performance, Clustered high availability

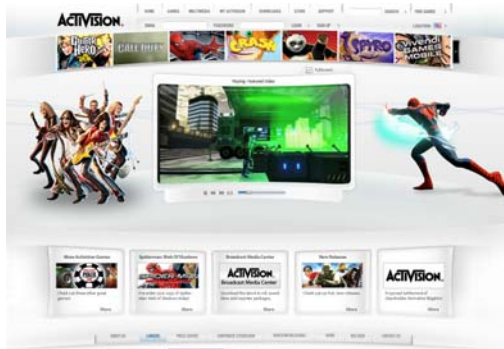
- NXP – Formerly Philips Semiconductors, \$6bn, 25,000 employees
- Lotus Notes migration, Foundation for content and collaboration services, rolling out to 25,000 users
- Alfresco – Future proof, Open architecture



- Swisscom – 11bn CHF, 19,000 employees
- Community based product innovation, User Generated Content (UGC), Community test, Rate and comment on future products, AJAX RIA
- Alfresco- Development flexibility, Open source, Cost

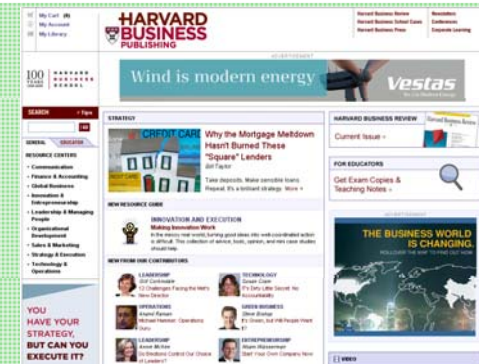


Web Content Management



- Activision – \$2.9bn, #1 U.S. console and handheld game publisher
- 40 different franchise microsites, 5m registered users, 5m guest users, 6 languages, 6 servers, JSP and Flash
- Alfresco - Huge savings in license costs, No tie-In, Dramatic savings in media costs

- Harvard Business School Publishing – Global thought leadership
- www.hbsp.harvard.edu, personalization with ATG, JSP
- Alfresco– Publish Time cut from 6 hours to 15 minutes, Rapid prototype in 2 weeks



- \$1B leading travel site and a division of Sabre.
- Using Alfresco to customize and upon which to build its global template of web properties, e.g., Travelocity.com, LastMinute.com.
- Reasons for choosing Alfresco: Open source, extensibility, cost



Major OEM Relationships



- **Adobe**
- Integrated Alfresco into its LiveCycle product line
- Reasons for choosing Alfresco: Standards based, highly flexible, superior performance

- **Quark**
- Workflow and content lifecycle management for dynamic document assembly and publishing
- Reasons for choosing Alfresco: Standards based, lower cost





Alfresco Product





- **Eng. Gabriele Columbro**
 - Solution Engineer, Professional Services, EMEA
 - Alfresco Contributor
 - Apache Chemistry committer
- **Background**
 - Master in Computer Engineering on Open Source ECM and Business Process Reengineering
 - 3 years as Alfresco partner at EMEA Level
 - Italy, Netherlands, UK
 - Project leading / ECM architectures / Alfresco specialist





Alfresco : What we do Enterprise Content Management

Document Management
Capture, Share and Retain Content



- [Learn More and Test Drive](#)

Web Content Management
Engage Through Content



- [Learn More and Test Drive](#)


Collaboration
SharePoint® Alternative



- [Learn More and Test Drive](#)

[Client Applications](#)
[Alfresco Content Services](#)
[Alfresco Repository](#)

Alfresco Content Platform
Content-as-a-Service from the most scalable Java Content Repository
– Clustered, federated and replicated. [Learn More](#)





History of a success

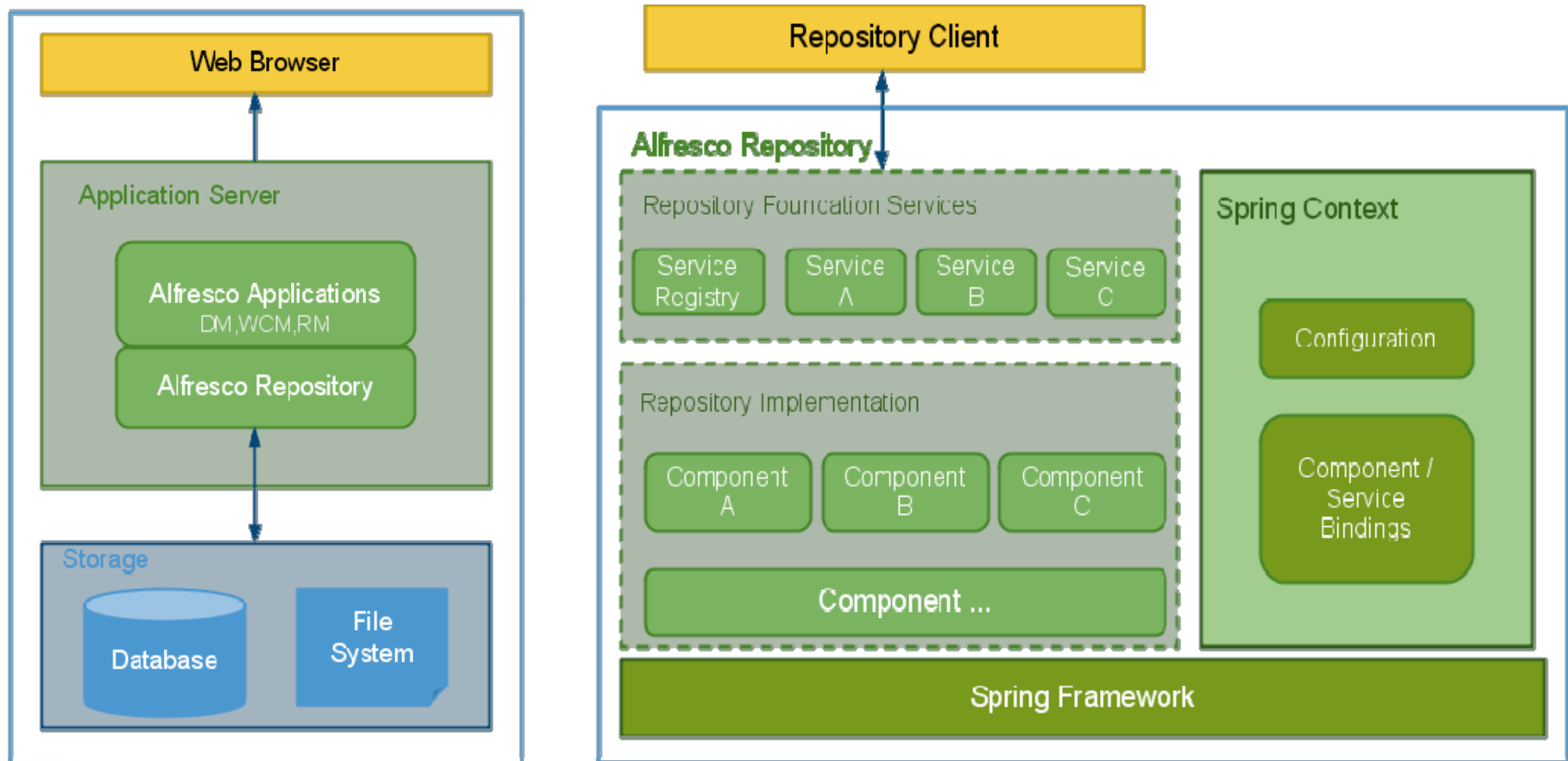
- 04/2006: First fully open source ECM release (1.2)
- 02/2007: ECM + WCM + RM (2.0)
- 12/2007: Office Integration (2.1.1)
- 10/2008: Version 3.0
 - Share/Collaboration
 - Sharepoint Protocol Support
 - SURF Framework
 - CMIS
- Outstanding innovation disruptive boost!





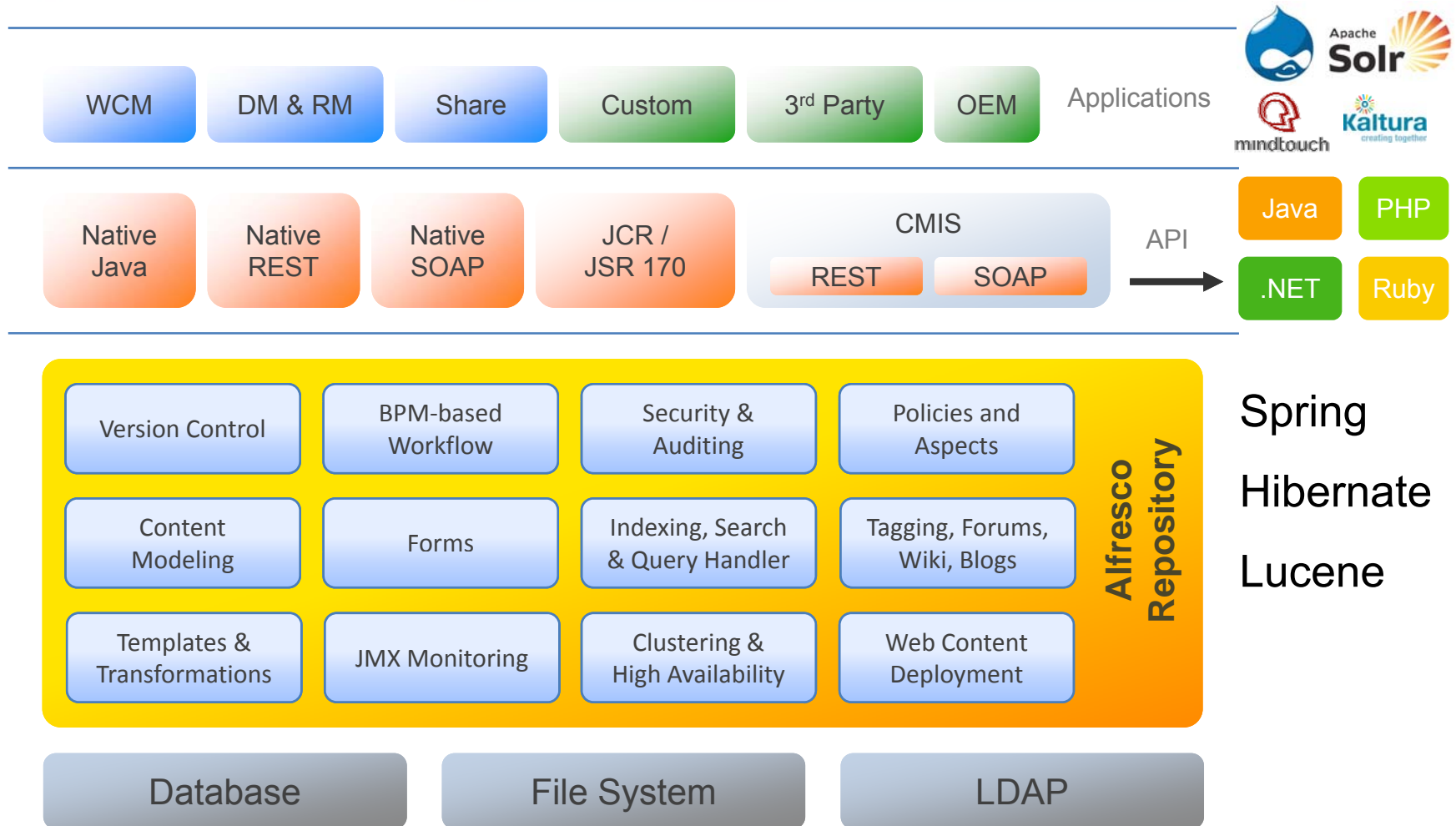
Repository Architecture

- Linear and designed for extension





Best of breed technologies and open standards



Spring
Hibernate
Lucene



Alfresco components

Spring

Web Scripts

SHARE

Web Site

Portal

SURF
Presentation
Services

YUI

Content and
Collaboration
Services

Remote
Protocols

Persistence and
Search
Services

Virtual
File
Services

