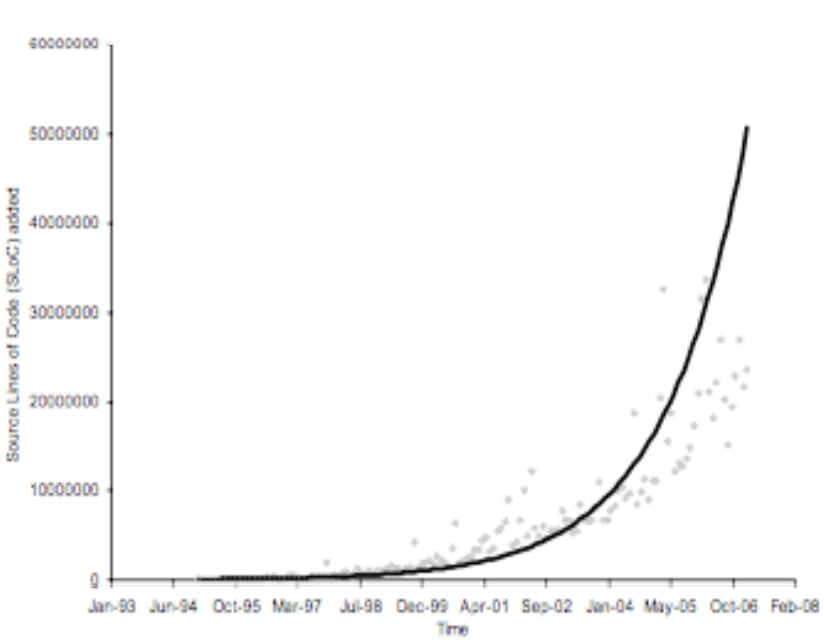
The New, Open Face of Content

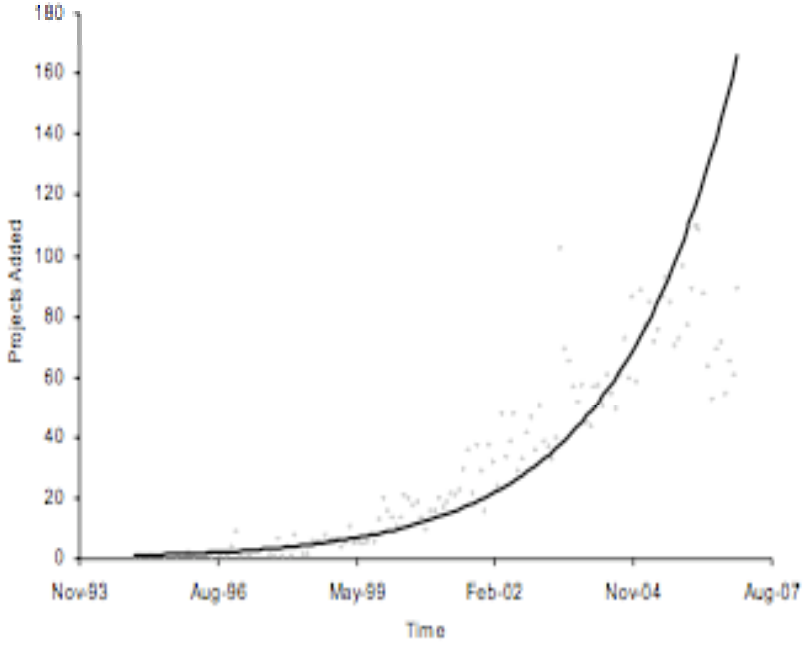
Matt Asay
Vice President, Business Development
Alfresco

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

Open source = Economy's silver lining

THE WALL STREET JOURNAL.

WEEKEND EDITION

WSJ.com

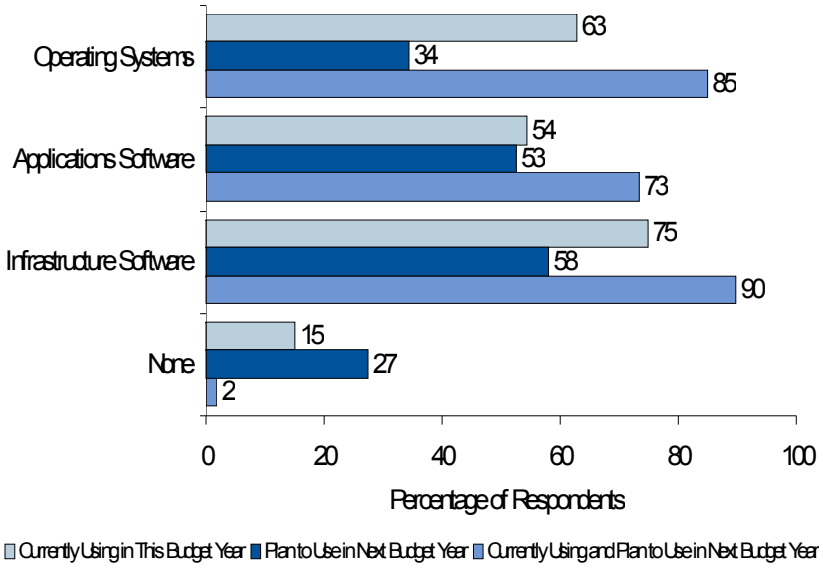
Jobless Rate Tops 8%, Highest in 26 Years

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

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

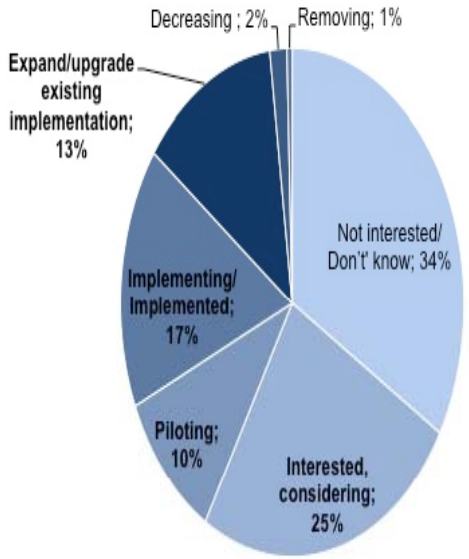
Open source: Adoption is acclerating

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?



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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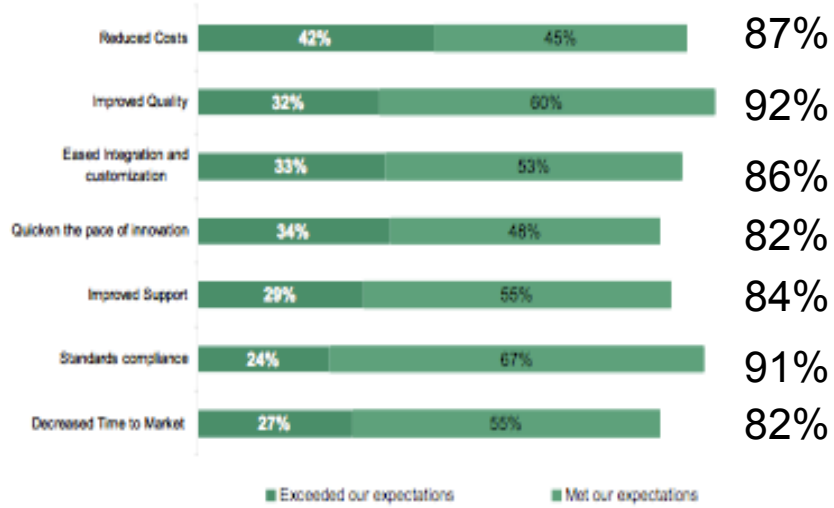
FORRESTER

~100% to adopt open-source by 2010

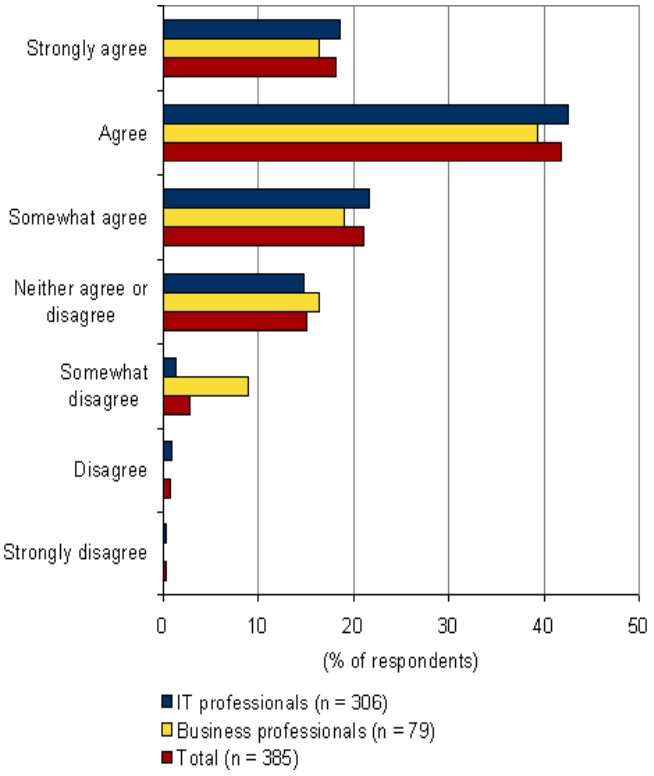
Open source delivers…for less

"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

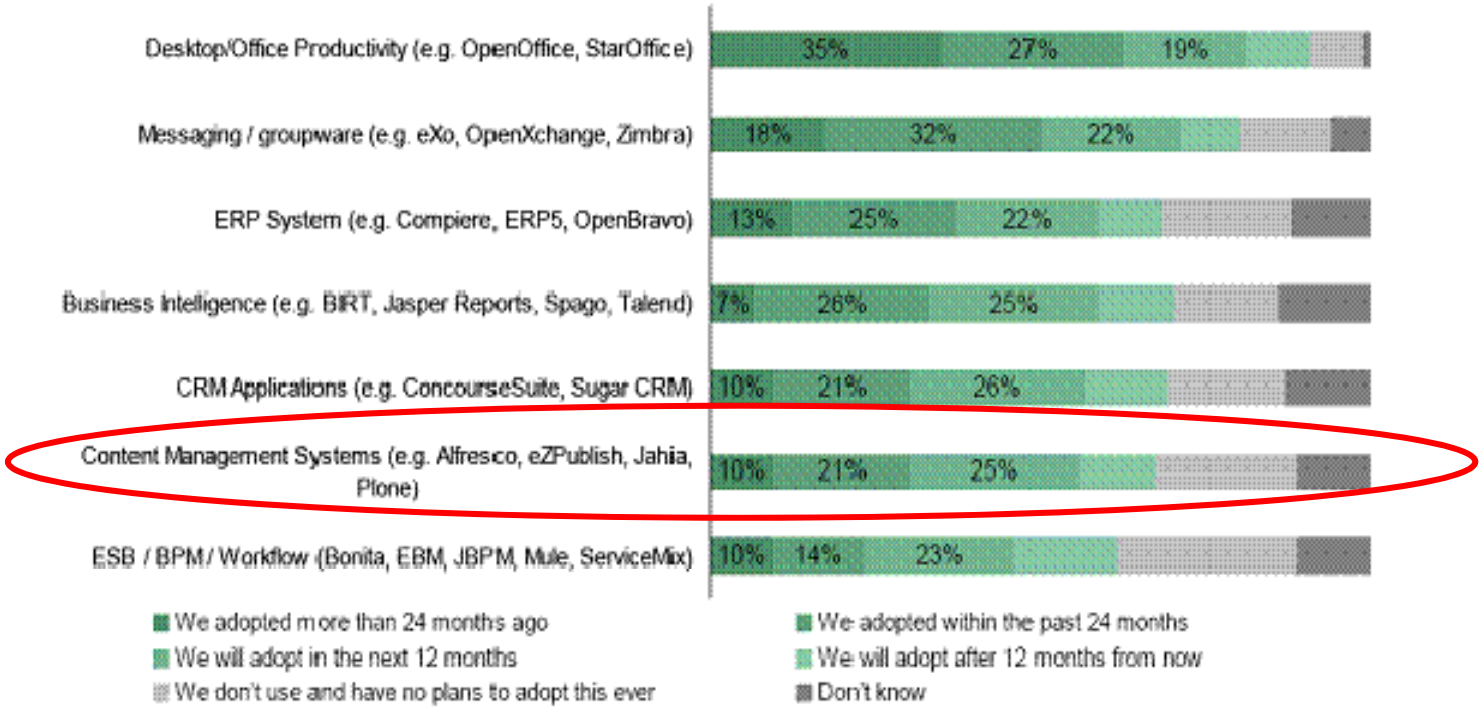
"Open source produces better software"



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?"



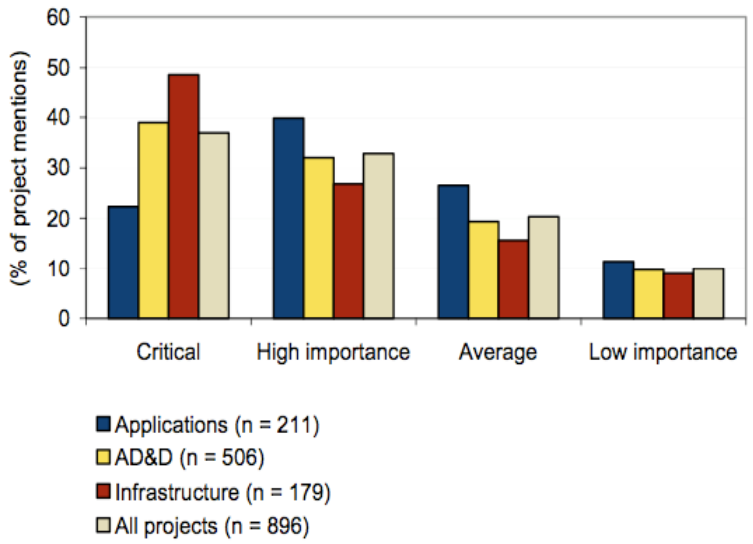
Base: 102 Senior Business & IT Executives involved in the decision making for open source software technology and related services in large enterprises. Western European OSS Online Survey conducted by Forrester Consulting and commissioned by BULL, September 2008

56% to adopt an open-source CMS by 2010

Source: Forrester, 2009

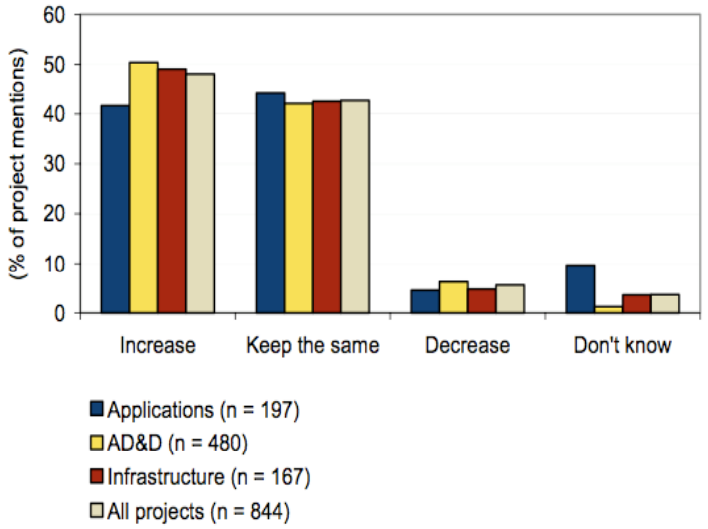
Open source = mission-critical

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

Open source = lower risk

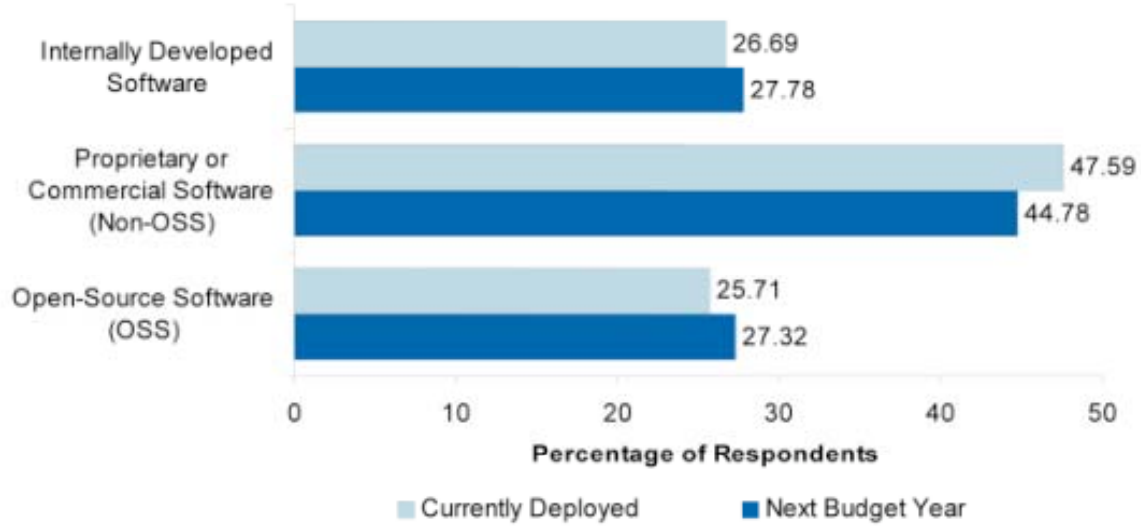
- Most IT projects fail
- Open source de-risks software acquisition:
  - Try before you buy
  - Stop your subscription if the vendor stops providing value
  - Dramatically lower cost
- Worst case:
  - Project dies and you're out $xx,xxx or $xxx,xxx, not $x,xxx,xxx
- IT project failure becomes less probabilistic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

So what will this do to your proprietary vendors?

Alfresco

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

Alfresco

Their response?

More content + fewer vendors = high cost

Office Microsoft®

facebook

YouTube
Broadcast Yourself

flickr BETA

IBM

FileNet

ORACLE | STELLENT

MySQL Sun microsystems

VIGNETTE is now
OPEN TEXT
The Content Experts

Autonomy
INTERWOVEN

INTERWOVEN

The Antidote

Alfresco is different

Lower Cost

Simplicity

Choice

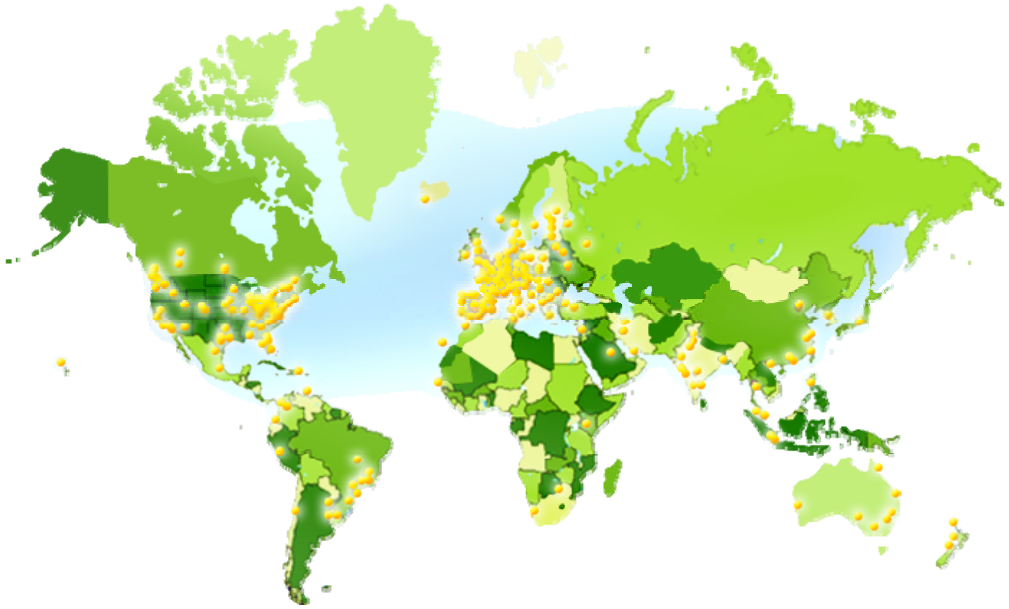
Introducing Alfresco

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

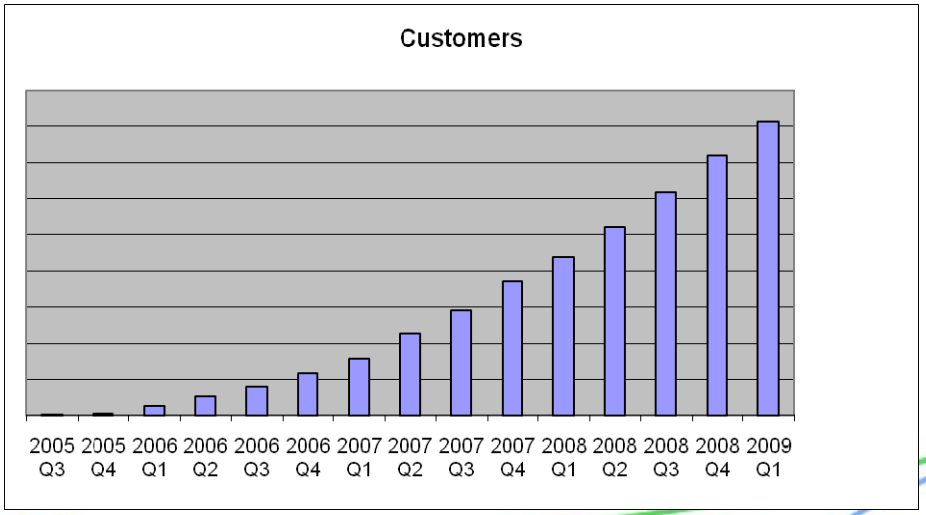
- 100,000 community members
- 50,000+ live sites
- 150 Forge applications



1,000+ Customers

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

300% growth for 2 years

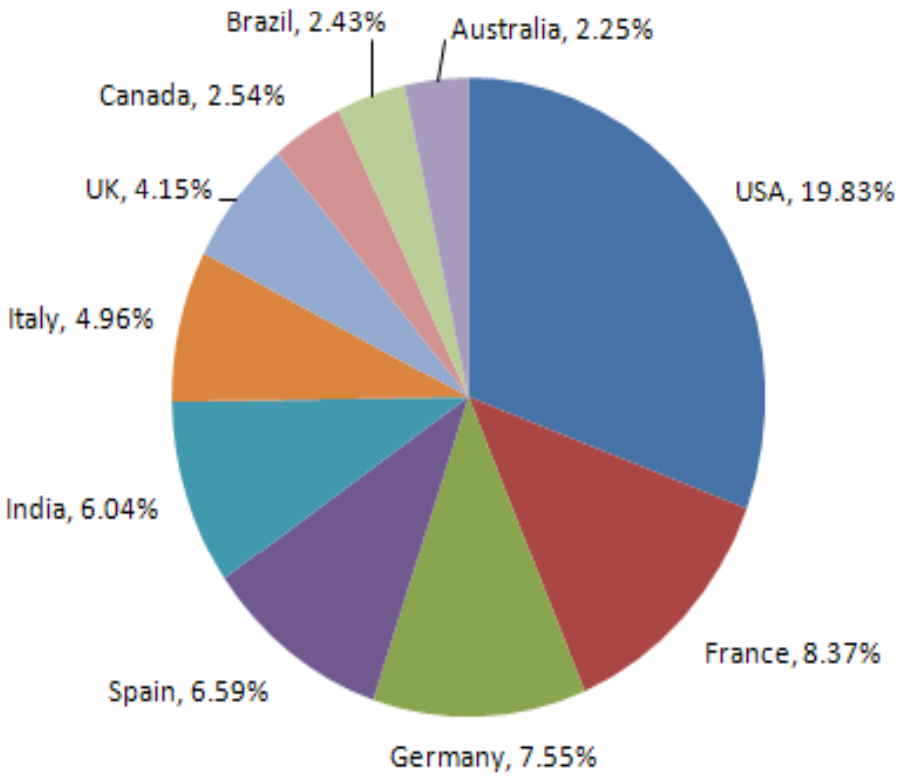


Market Buzz

- Greater web activity than EMC Documentum, Interwoven and OpenText

Alfresco is a global community

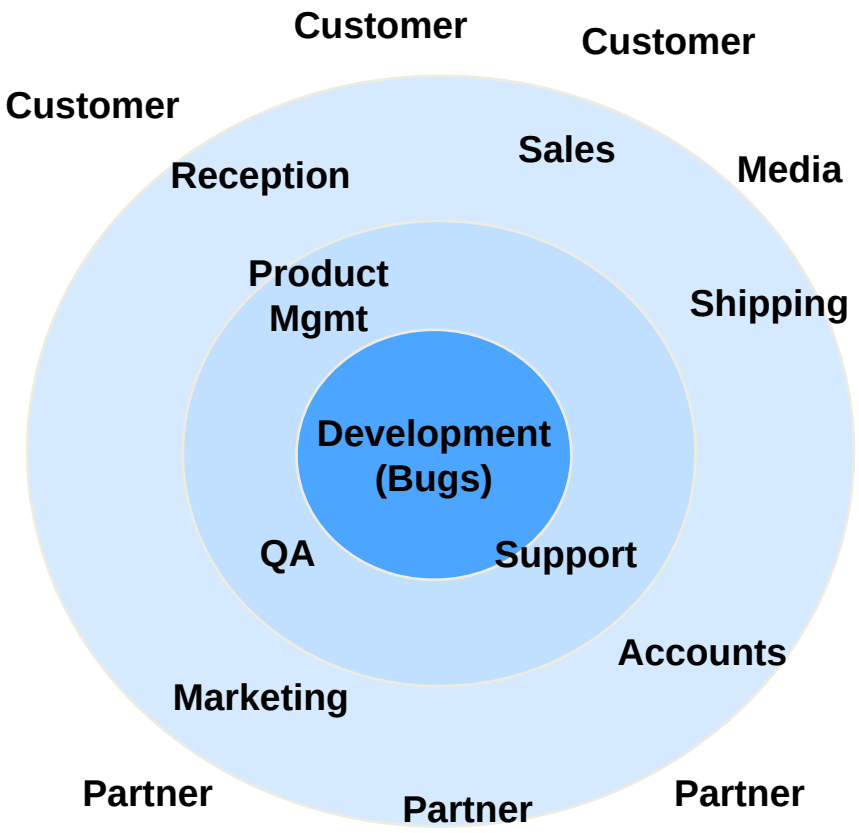
Alfresco Community Members Top 10 Countries



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”

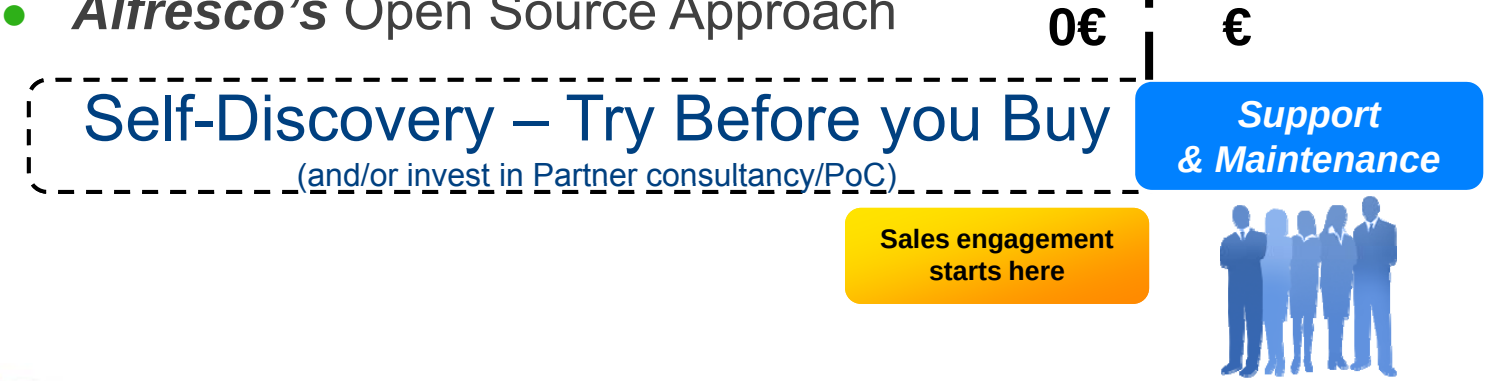
Mike Davis, Senior Analyst
"[Alfresco] has the technical capabilities, and along with Microsoft is likely to be the most disruptive player in the ECM market at the enterprise level in the next five years.“

Kyle McNabb, Senior Analyst
“The collaboration piece Alfresco Share is helping to signal **the end of today's definition of ECM**…..”

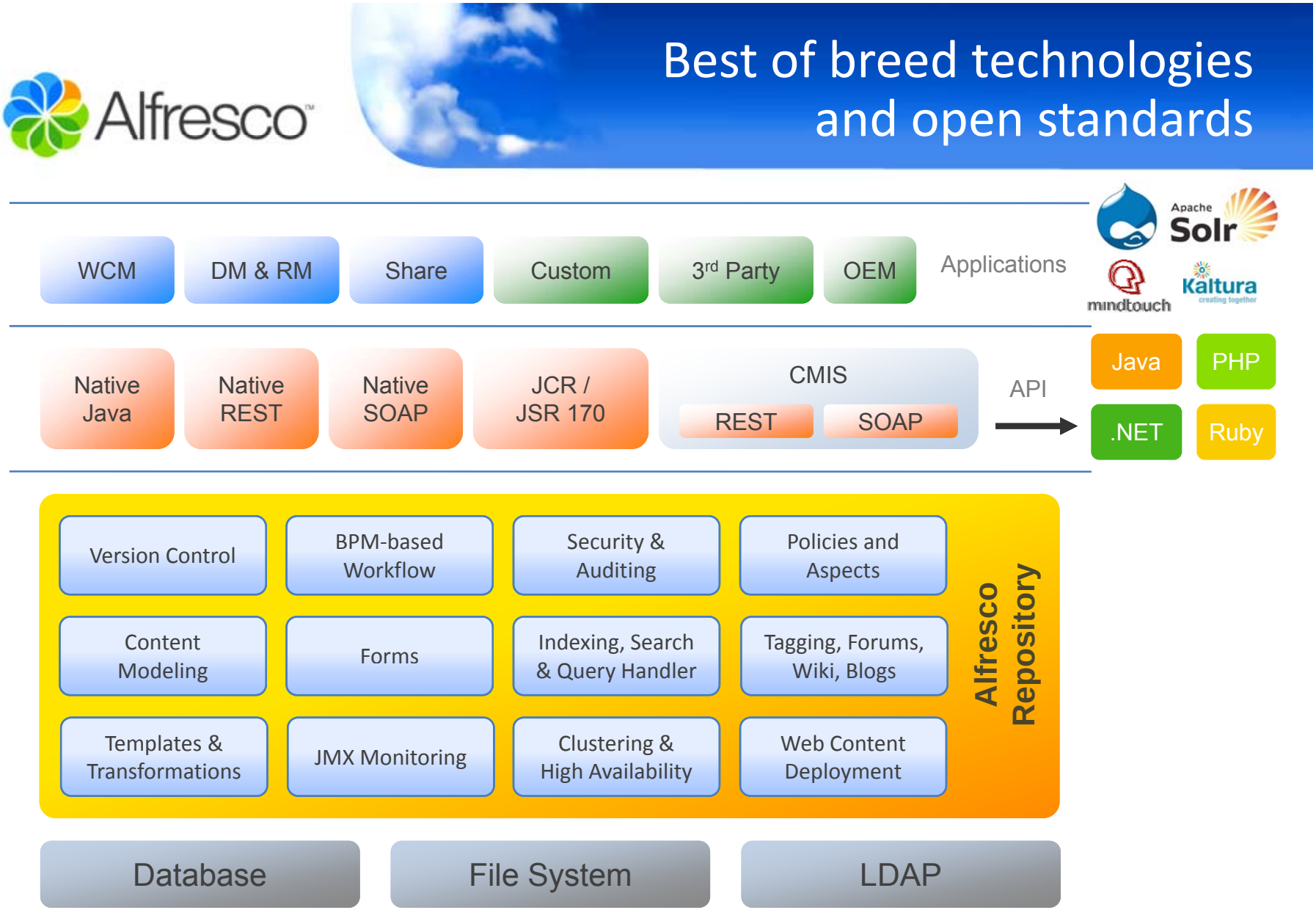
Open source vs proprietary:
A different sales approach

- ***Traditional*** Enterprise Software Vendors

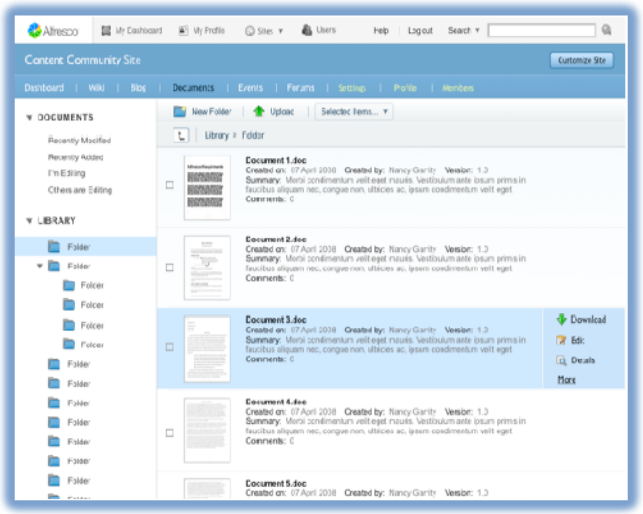
- ***Alfresco's*** Open Source Approach

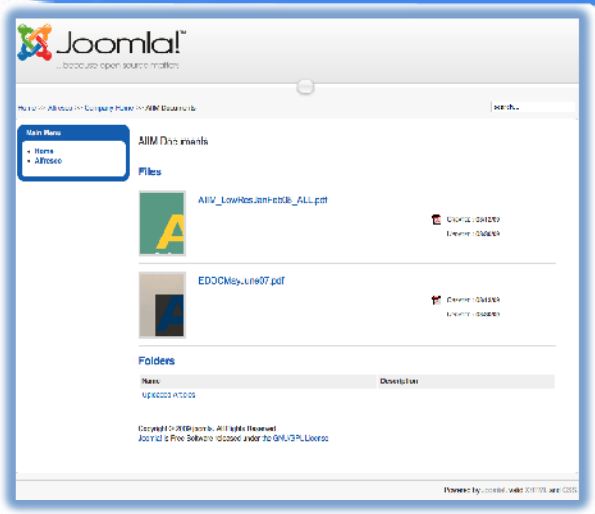


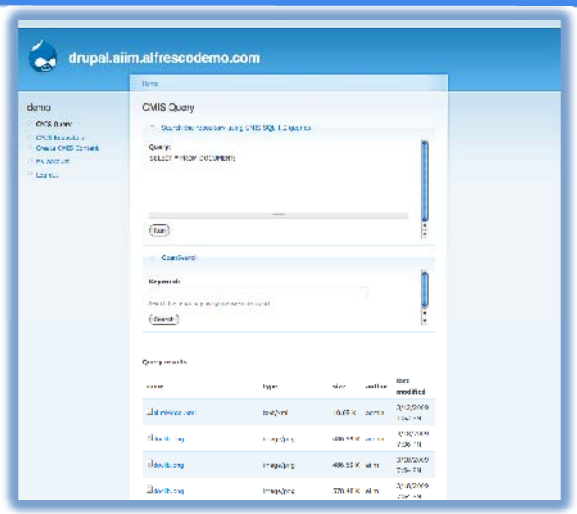
Best of breed technologies and open standards



CMIS & vendor interoperability





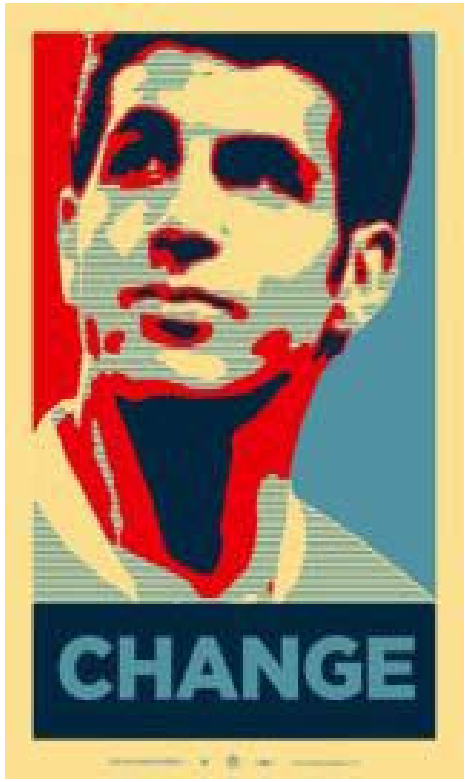


CMIS Content Application

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



email | matt.asay@alfresco.com

twitter | twitter.com/mjasay

blog | cnet.com/openroad

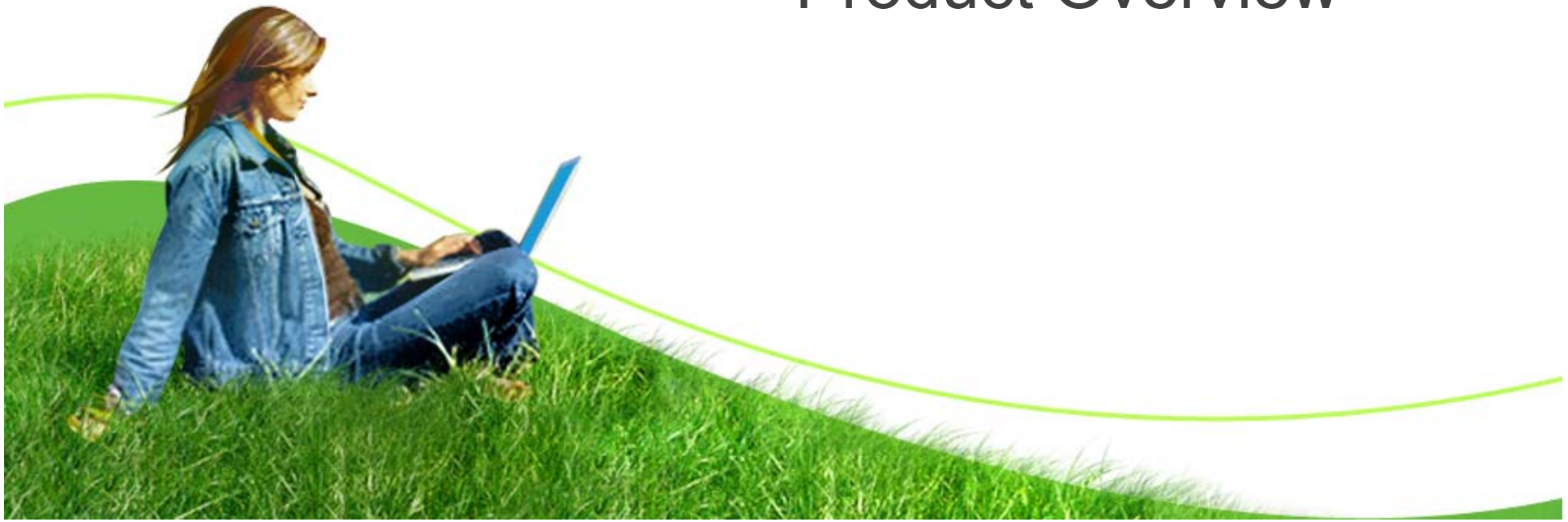
Bill Brooks
Sales Manager, Spain and Portugal
Alfresco Software
bill.brooks@alfresco.com

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

Alfresco™

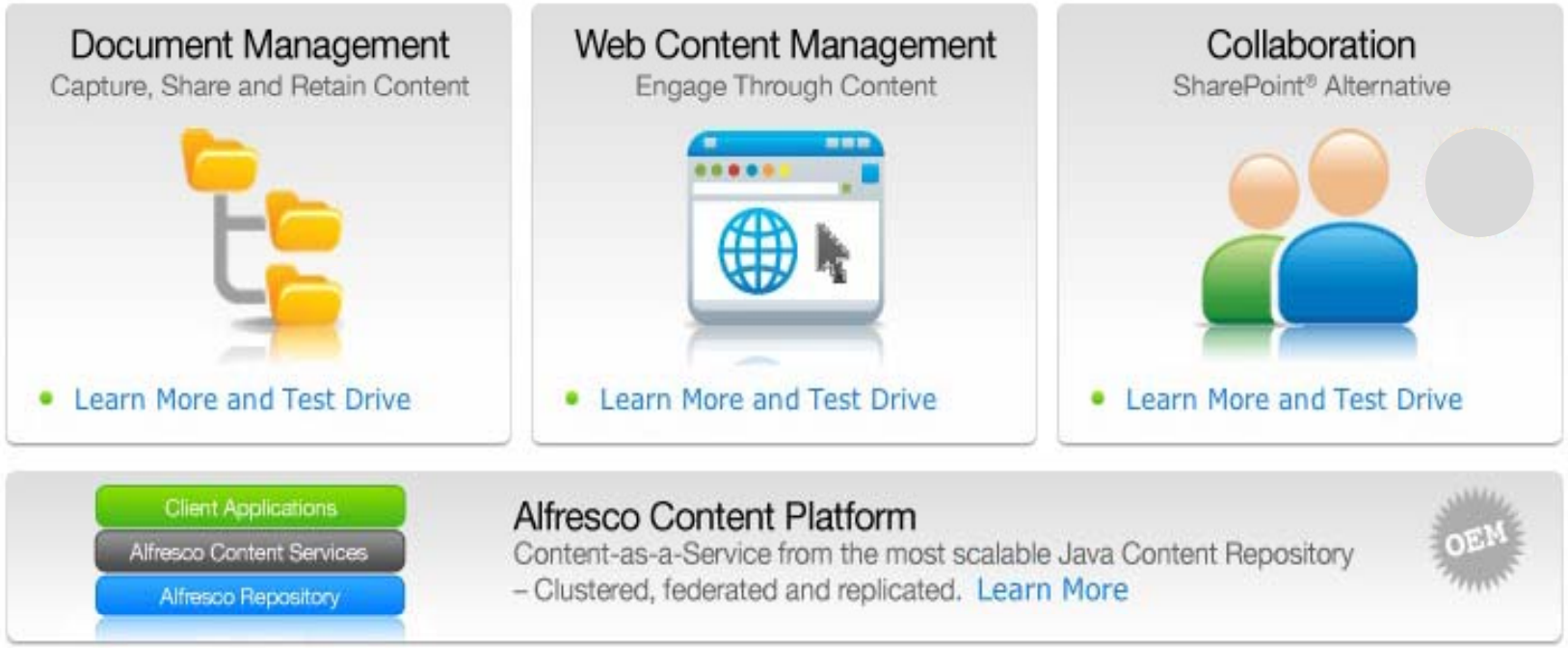
Product Overview



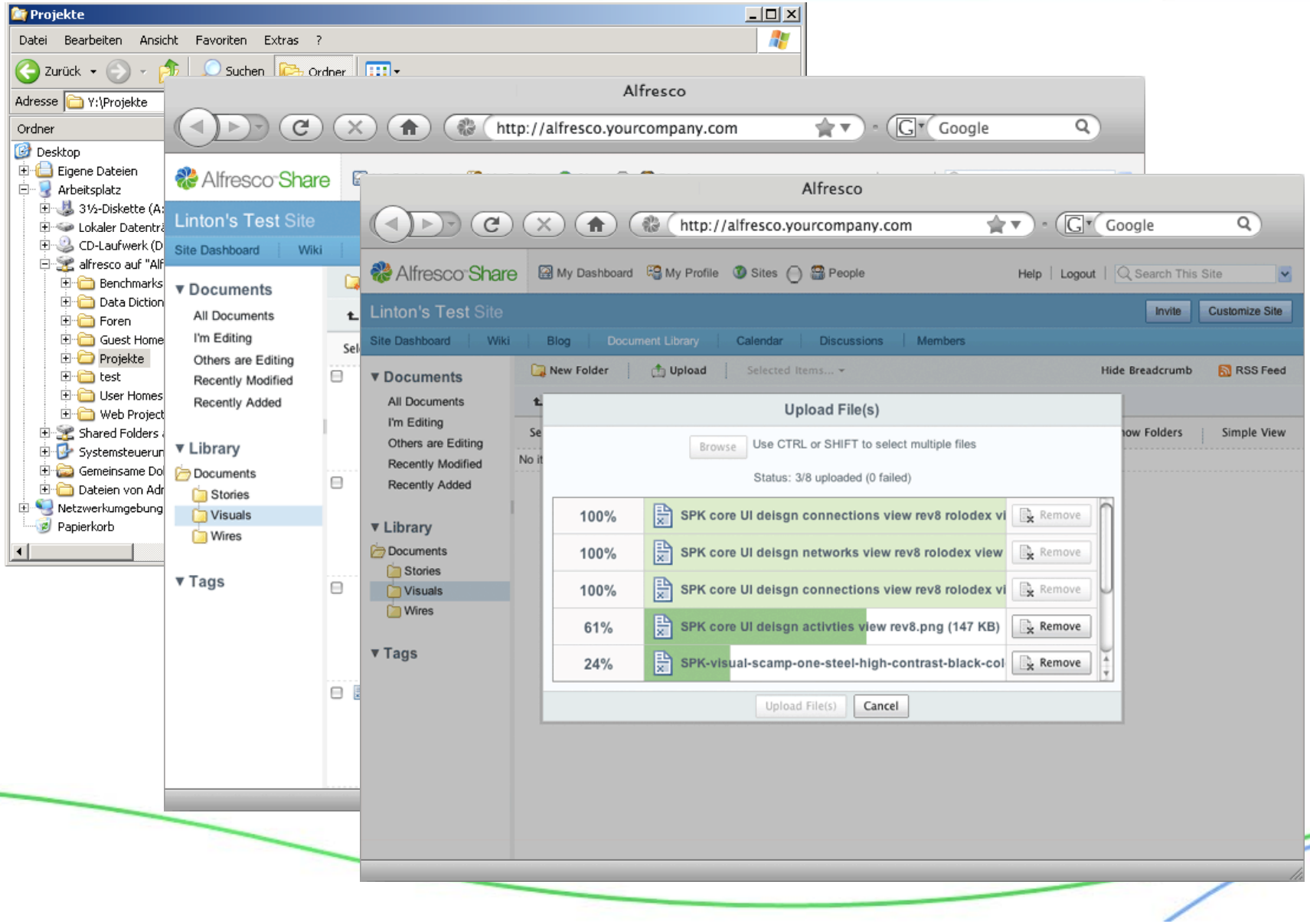
ECM version 2.0

- 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

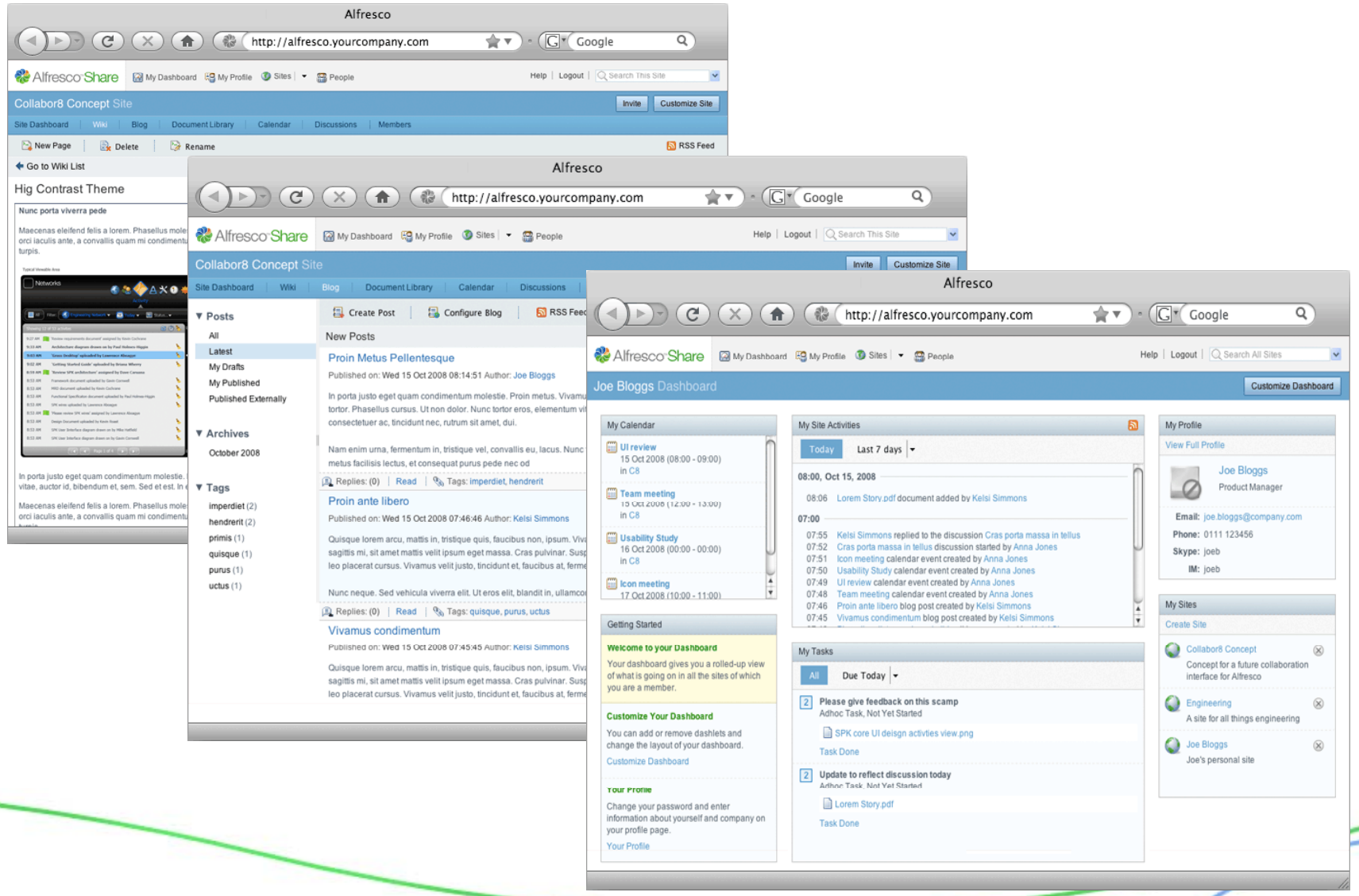
Alfresco : What we do
Enterprise Content Management



Document Management



Collaboration

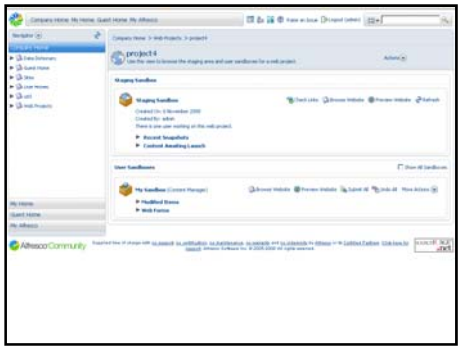


Alfresco WCM

Web Content Management

Flexible Content Generation

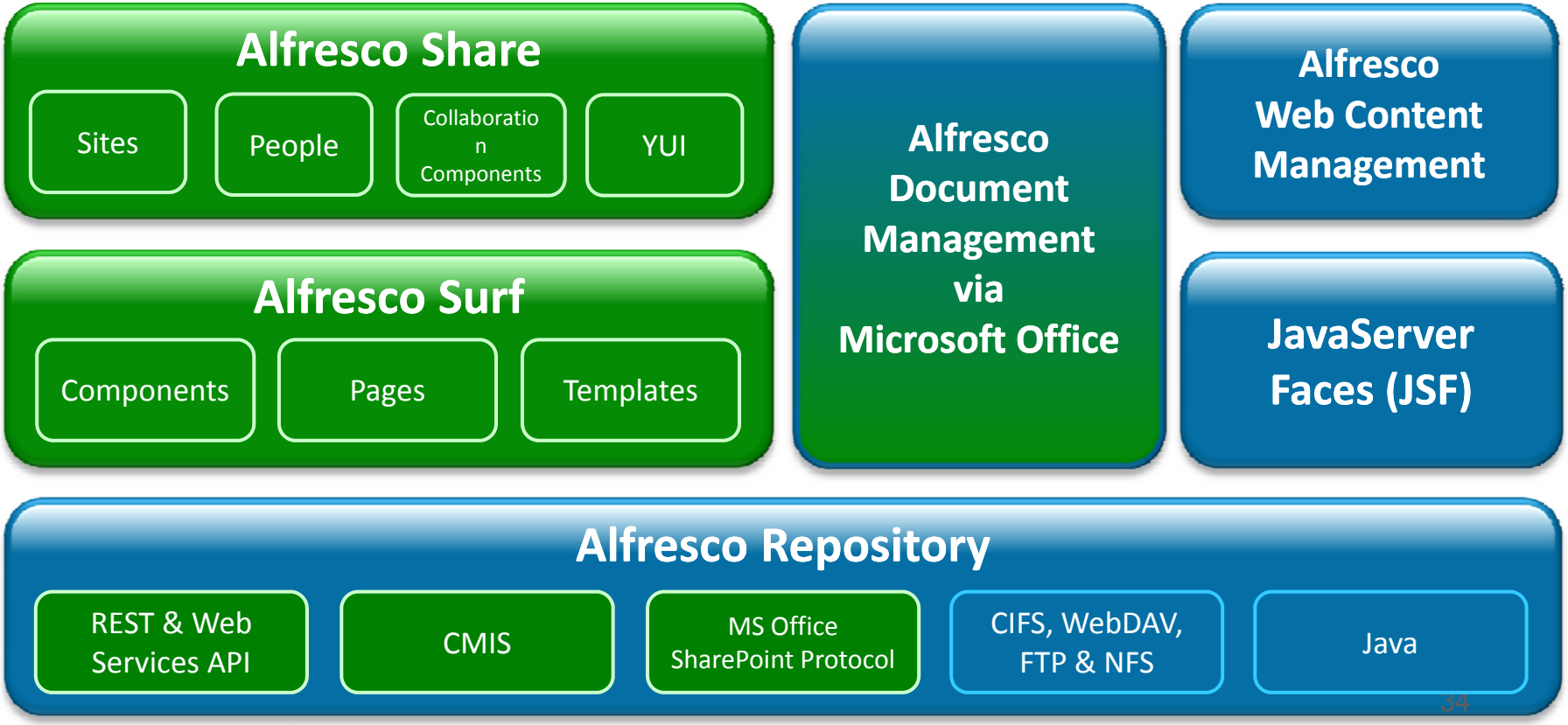
Alfresco WCM



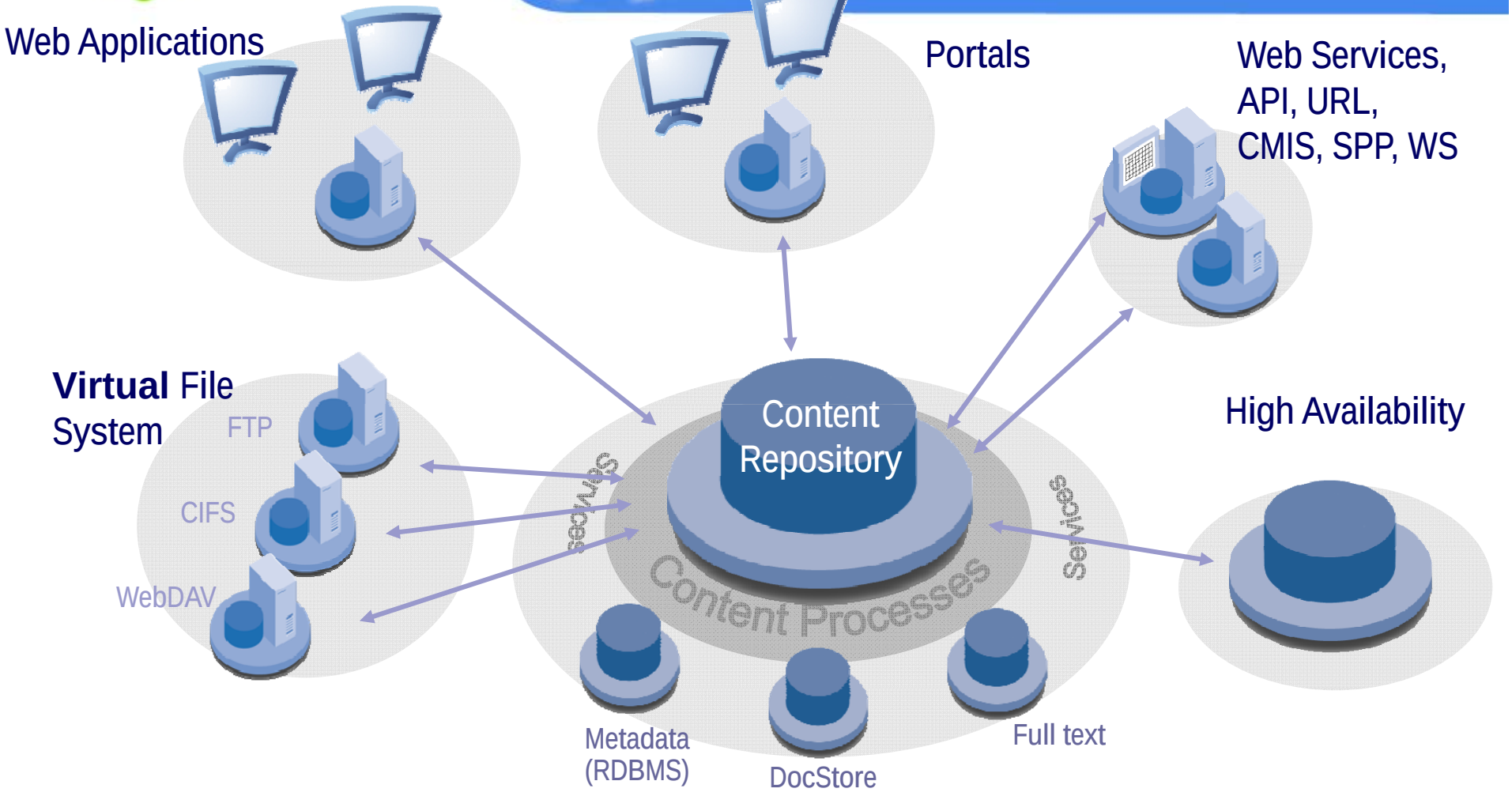
Live Web Site

User Sandbox | **Staging Sandbox** | **Multiple Web Servers**

Products and Protocols



User Access / Interfaces



Alfresco™

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, waaranty, 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

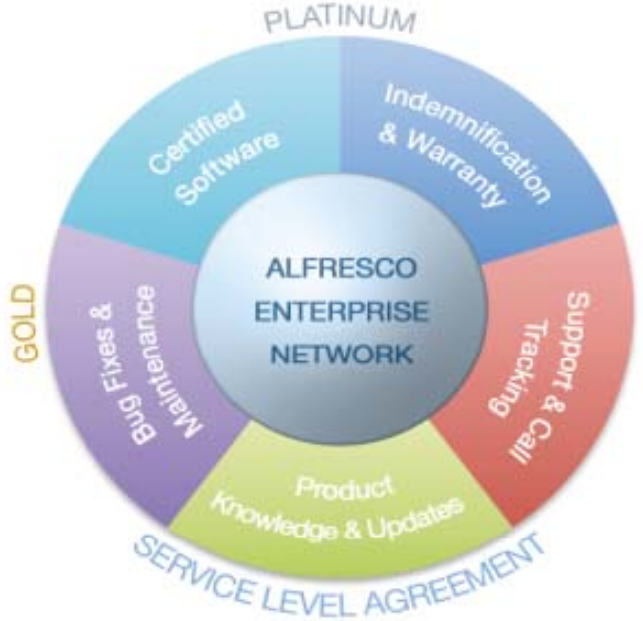
Enterprise Features

	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*



Pricing

- 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

Alfresco™

Customer Examples and References

Government

- 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 centraliased / distributed implementatiom

- 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

Alfresco

SAINT-GOBAIN

- 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

ARMÉE DE L'AIR

caceis
INVESTOR SERVICES

- 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

Alfresco

SAP

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

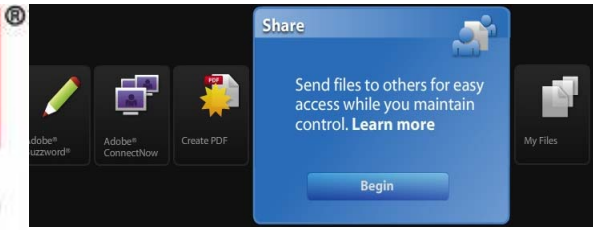
- CRIX – Consortium of over 20 leading pharma companies including Merck, Eli Lily, AstraZeneca, Pfizer and Novartis
- Secure standards-based electronic information exchange for clinical research
- Alfresco – Lower transaction fees, reduce human error, established standard, Lower transaction costs

CRIX™ INTERNATIONAL

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

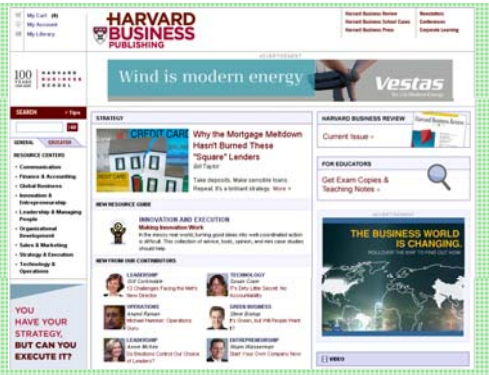
- Swisscom – 11bn CHF, 19,000 employees
- Community based product innovation, User Generated Content (UGC), Community test, Rate and comment on future products, AJAX RIA
- Alfresco- Development flexibility, Open source, Cost

Web Content Management

Alfresco

- 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



travelocity

- $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

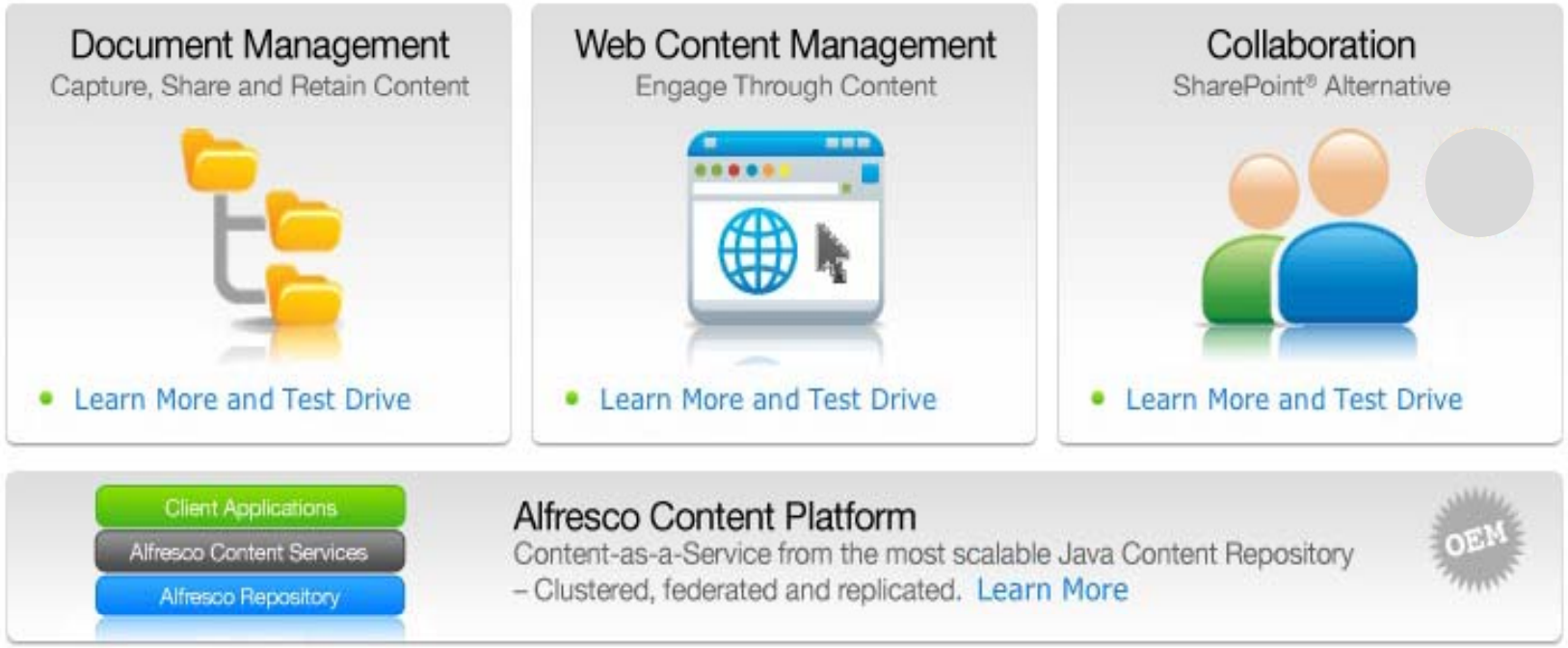
Alfresco™

Alfresco Product

Introduction

- 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

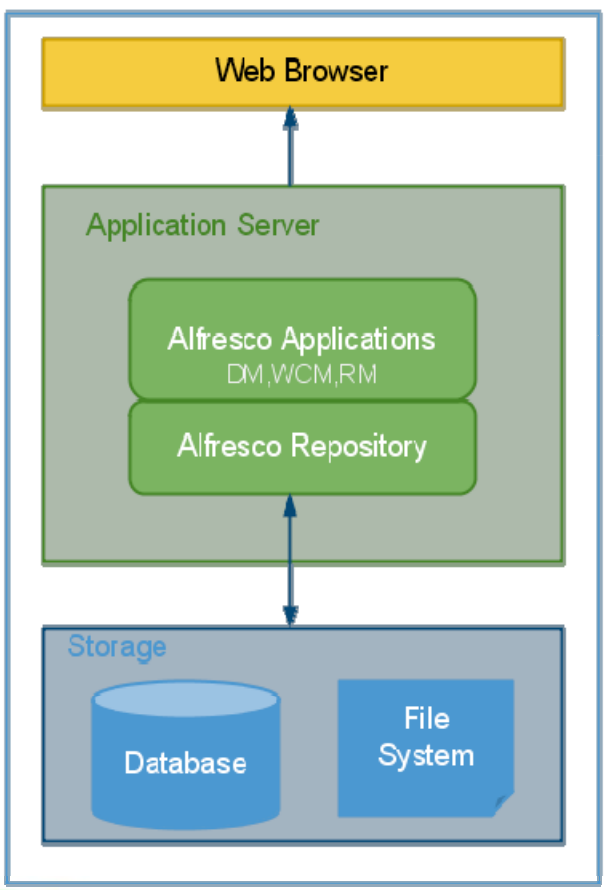


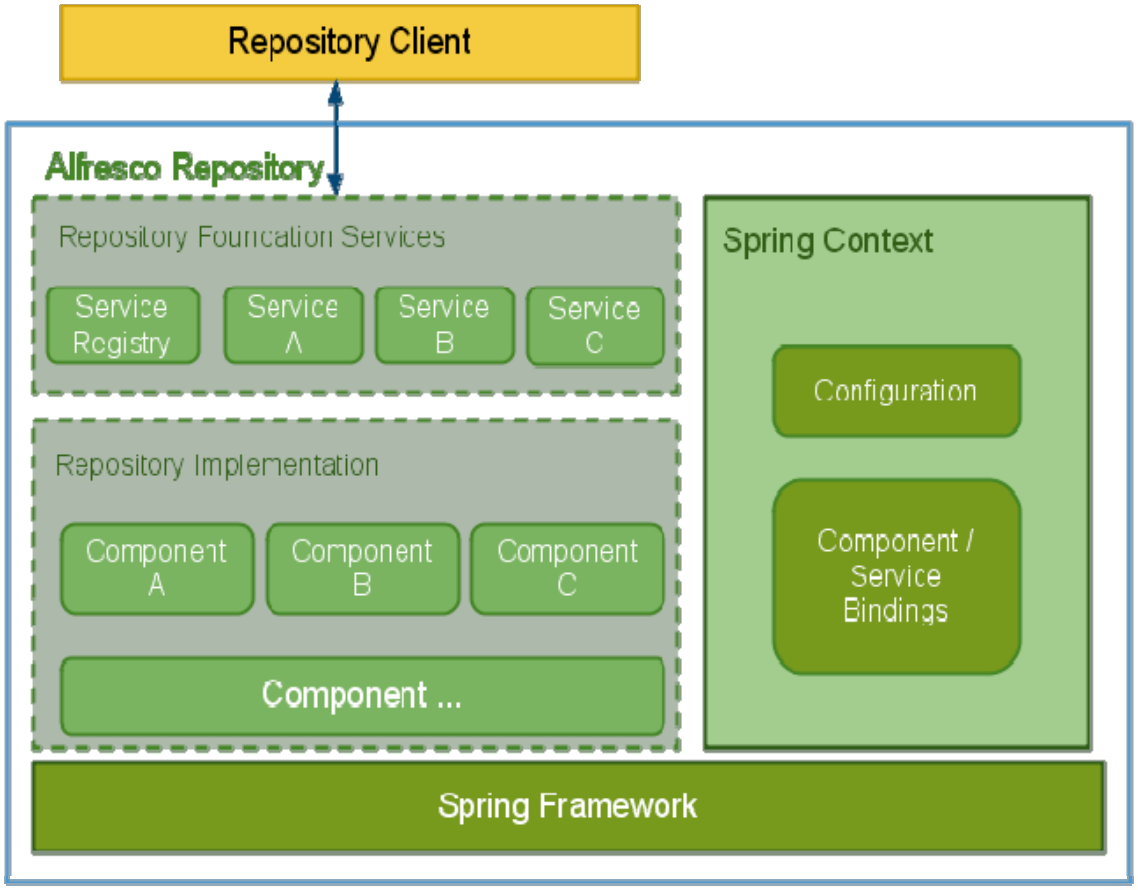
History of a success

- 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!

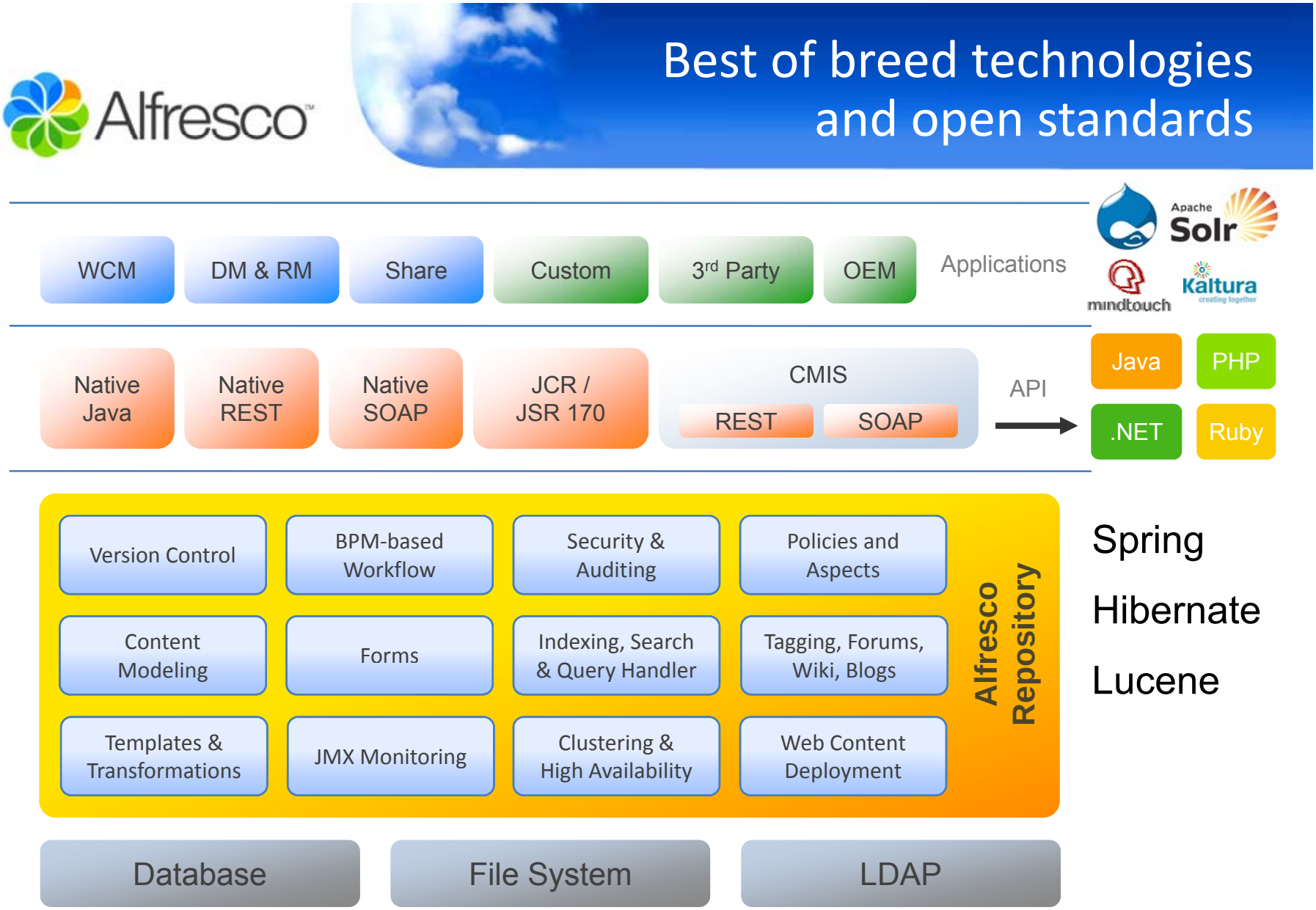
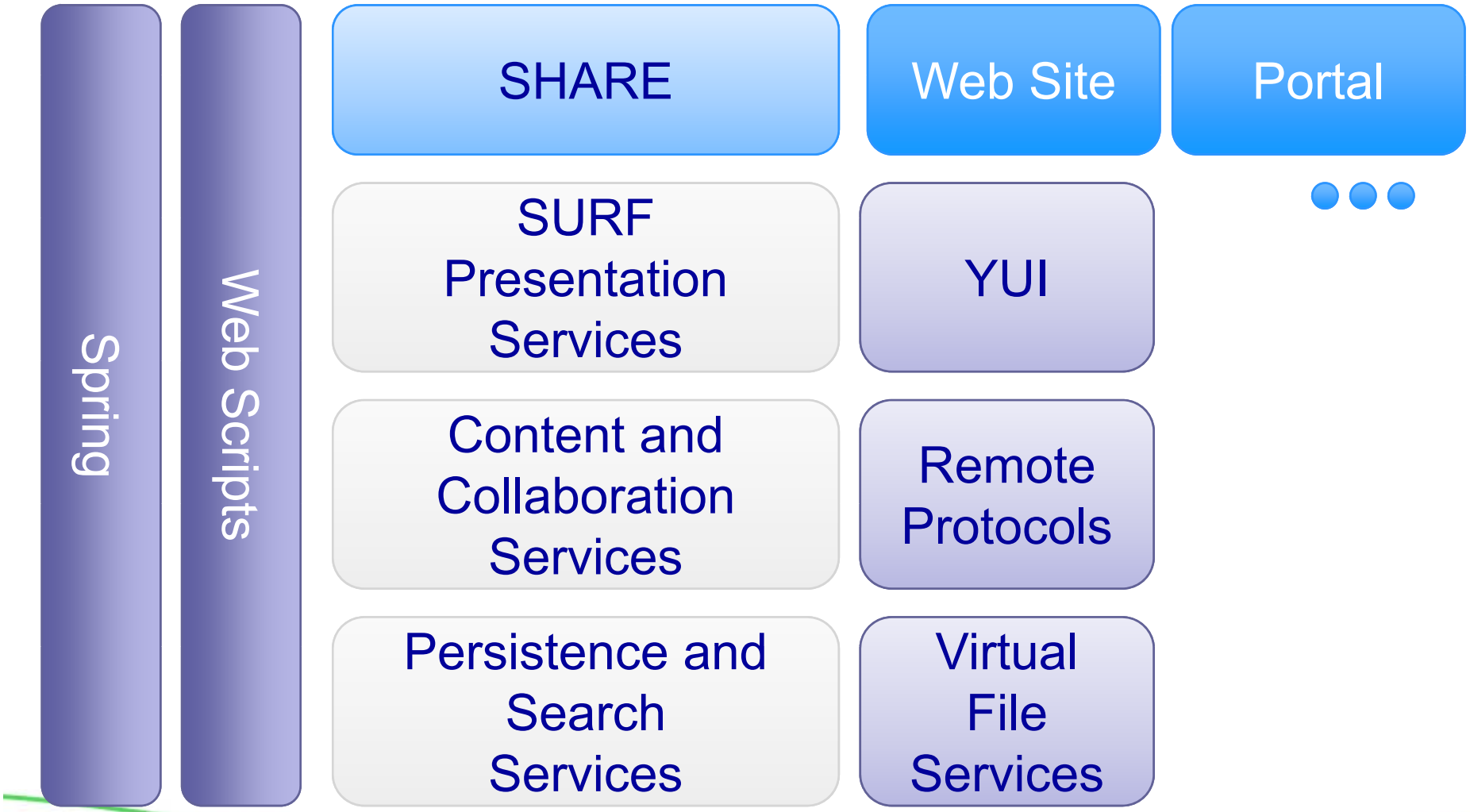
Repository Architecture

- Linear and designed for extension





Best of breed technologies and open standards



Alfresco components