



Records Management market study for Germany, Austria and Switzerland
Dr. Ulrich Kampffmeyer
DLM Forum Conference
Toulouse, Decembre 11th 2008



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Germany, Austria and Switzerland**
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PROJECT CONSULT
Unternehmensberatung Dr. Ulrich Kampffmeyer GmbH

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Edited version for print.
Automation and animation removed.

Original Powerpoint version:

http://www.PROJECT-CONSULT.net/files/20081211_DLM_Forum_RM_Market_Study_Kff.pps

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Agenda

- Introduction:
Records Management in Germany, Austria and Switzerland
- Problems of the RM terminology in the German language
- Marketstudies in 2007 and 2008
- Adoption of RM in Germany, Austria and Switzerland
- Different views of end users and vendors
- Outlook:
Consequences for market education and MoReq2 dissemination

Introduction Setting the Scene



Records Management in Germany, Austria and Switzerland

- The terms „Record“ and „Records Management“ are uncommon in Germany, Austria and Switzerland
- „Schriftgutverwaltung“ is the term used by the ISO 15489 translation
- Depending on the country terms like „Dokument“, „Akte“, „Dossier“, „Akt“ or „Vorgang“ are used in the Public Sector for Records
- MoReq (1) has not been translated into German ...

Example

Wikipedia.de

- The article „Records Management“ is dominated by Swiss terminology and perception
- The article „Schriftgutverwaltung“ is giving reference to ISO 15489
- There is no article about the term „Record“ but about the term „Dokument“



By the way ...

- Articles about MoReq and Moreq2 are only to be found in the French and German Wikipedia ...
- There is no article on Wikipedia about the DLM Forum ...

Records Management in Germany, Austria and Switzerland

- Standard software tools have been marketed as „Dokumentenmanagement“ (Document Management in a broader sense) or „Elektronische Archivierung“ (Digital Preservation)
- These Tools have a lot of Records Management functionality, but have not been positioned as Records Management



Records Management in Germany, Austria and Switzerland

- The term Records Management is known
 - in the „academic records managers world“
 - in the Public Sector in Switzerland
 - in the pharmazeutical industry
 - in the financial industry
- There is a different „Records Management“ culture ...

Records Management in Germany, Austria and Switzerland

- Public Sector standardisation like
 - DOMEA in Germany
 - ELAK in Austria
 - GEVER in Switzerlandhas a different approach compared to Records Management in other regions of the world



Records Management & Moreq2

Records Management & Moreq2

A lot of people in Germany, Austria and Switzerland have the opinion

- *„Records Management is not needed“*
- *„Records Management, especially MoReq2, is too complex“*
- *„Records Management concepts as presented by MoReq2 are even outdated“*
- *„MoReq2 is a waste of European money ...“*



Records Management & Moreq2

To make MoReq2 known and to create a better understanding, PROJECT CONSULT conducted

- November 2007
„**MoReq2 & Records Management**“ Roadshow
5 cities in Germany
- May/June 2008
„**Efficient Use of Records Management**“ Roadshow
(... + *Moreq2 ...naturally*)
Zurich, Vienna, 2 cities in Germany

Both roadshows: > 150 Participants
ca. 20% Public Sector, 40% Private Sector, 40% Vendors

Two Roadshow Participants Surveys One Market Study



Roadshow Participants Surveys

Data and Methodology

- Questionare distributed at the end of the events
- Single-/Multi-select with 2 to 6 options only
- Same questions 2007 and 2008
- Each year 92 completely answered forms
- 2007:
Mixed audience, only Germany
- 2008:
Mixed audience, Germany, Austria and Switzerland
- Most forms personalized with the possibility of „some“ differentiation in regard to the different sectors
- Only „interested“ people ...

Roadshow Participants Surveys

Main questions:

- What is your perception of the term “Records Management”
- What is the relevance of Records Management in your company or organisation?
- Is there a current need for Records Management in your company or organisation?
- What is the importance of Records Management standards?
- What will be the future impact of the MoReq2 standard in Europe?
- What will be the future impact of the MoReq2 standard in Germany (2008 respectivly Germany / Austria / Switzerland)?
- For which industries is MoReq2 of importance?



Web based Market Study

Data and Methodology

- ~ 2700 addresses emailed & forms accessible via web
- April 22nd to May 23rd, 2008
- Only passcode registered participants
- 6 questions of the surveys plus 18 more; more detailed
- Single-/Multi-select with 2 to 30 options
- Separate forms for end users and vendors
- Different questions/phrasing for endusers and vendors
- 236 passcodes issued; 171 passcodes used
- Usable data (completed forms 112):
 - Vendor forms: 69
 - End user forms: 43
 - 27% public sector, 13% insurance, 11% service companies, all others below 10%
 - Mainly large enterprises active in more than one country
- De-personalised evaluation

Web based Market Study

Main questions about:

- Industry, position, country, company size
- Definition of Records Management / Translation
- Use of and planning for Records Management solutions
- General relevance of Records Management
- Use cases / application areas
- Relevance for certain application areas and industries
- Relevance of Records Management for national and international compliance fulfillment
- Knowledge about and importance of Records Management standards and related standards



Web based Market Study

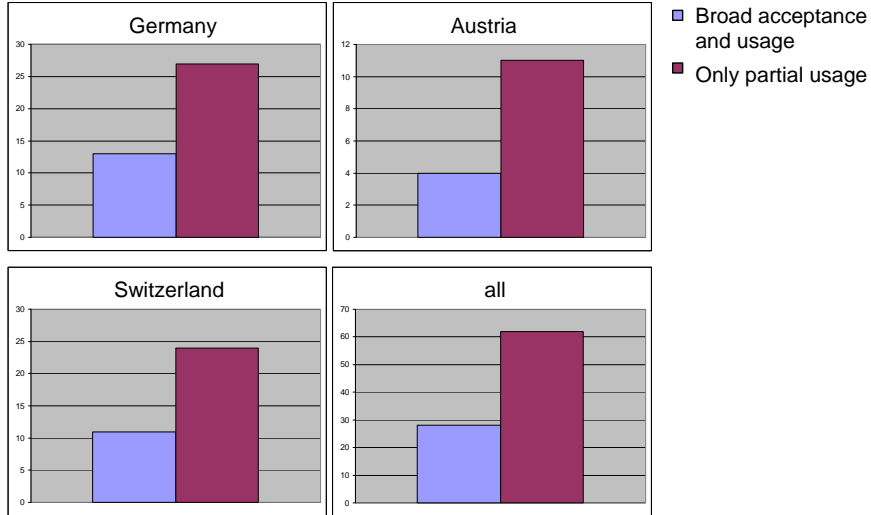
Main questions (contd.):

- Most important functions of Records Management (MoReq2 kernel modules)
- Most important additional functions (MoReq2 optional modules)
- Electronic and paper based Records Management
- Importance of certifications
- Future impact of MoReq2 in your home country and in Europe?
- Which sources are used to get information about Records Management? (... *thats why I stressed Wikipedia ...*)

Selected Results from the Roadshow Surveys

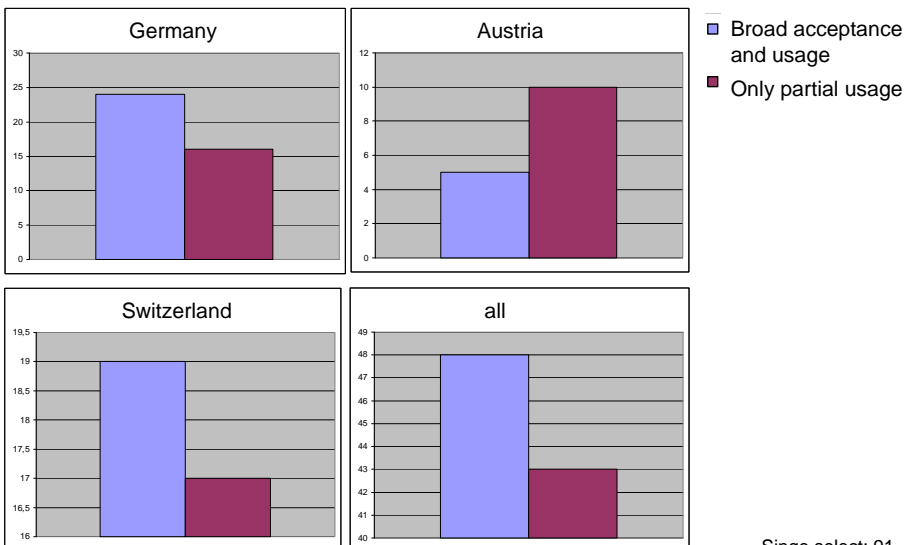


Roadshow Survey 2008
What will be the relevance of MoReq2 in Germany / Austria / Switzerland?



Single select: 92

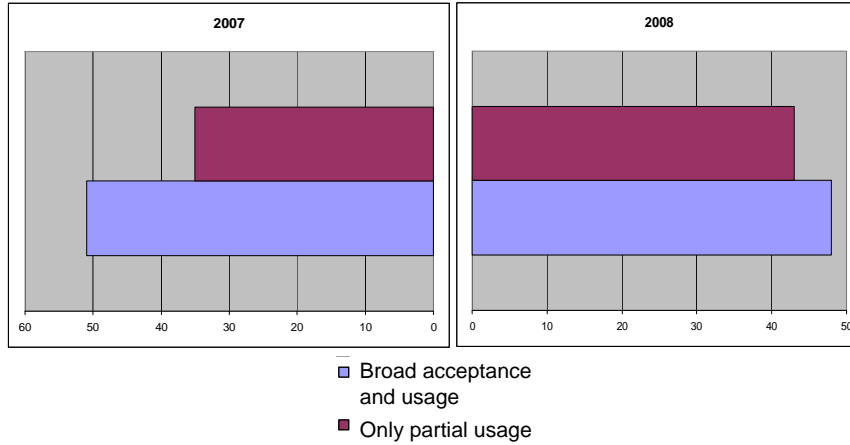
Roadshow Survey 2008
What will be the relevance of MoReq2 in Europe?



Single select: 91



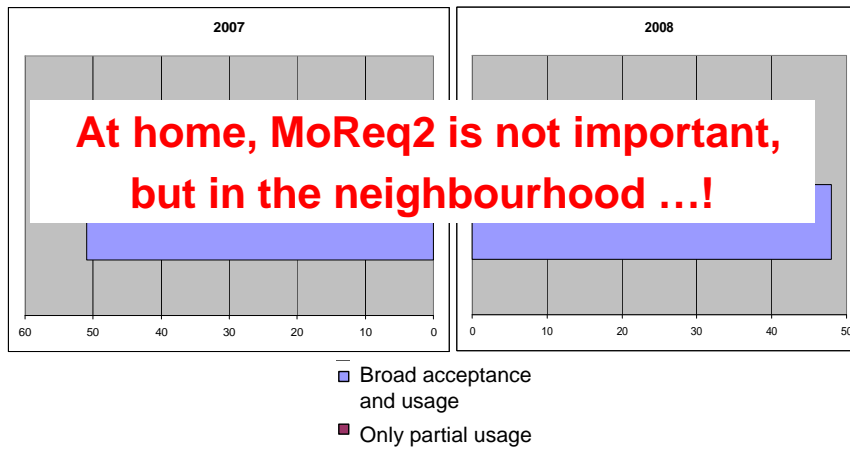
Roadshow Surveys 2007 & 2008 What will be the relevance of MoReq2 in Europe?



Single select: 92

Single select: 91

Roadshow Surveys 2007 & 2008 What will be the relevance of MoReq2 in Europe?

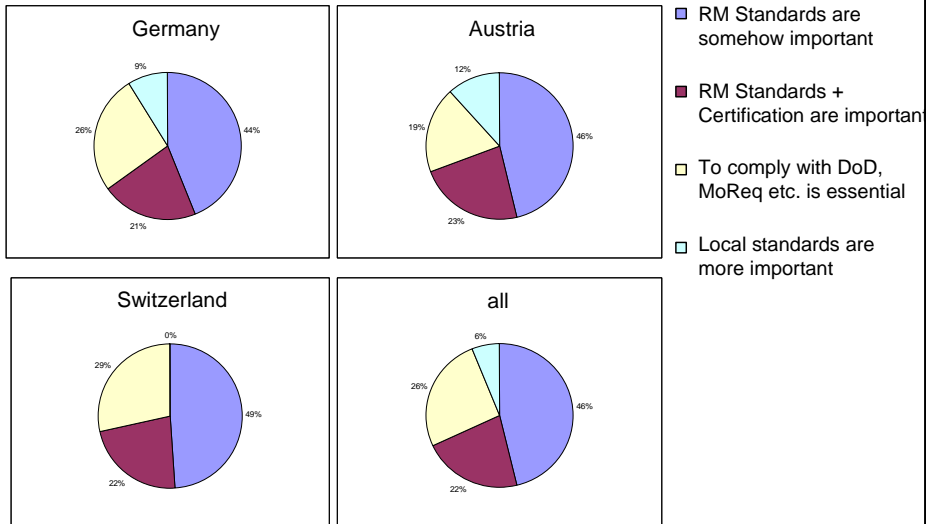


Single select: 92

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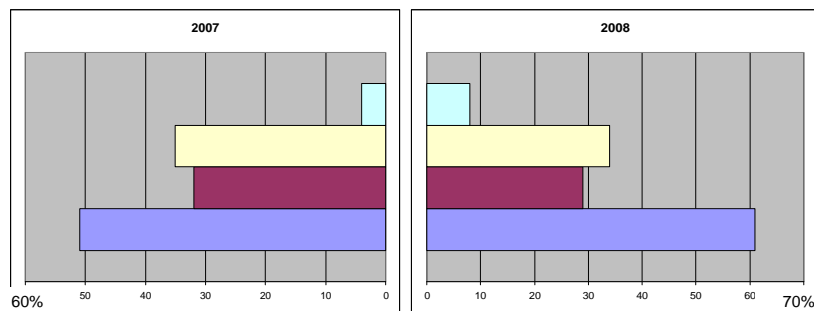


Roadshow 2008 Importance of Records Management Standards



Multiple select: 161

Roadshow Surveys 2007 & 2008 Importance of Records Management Standards



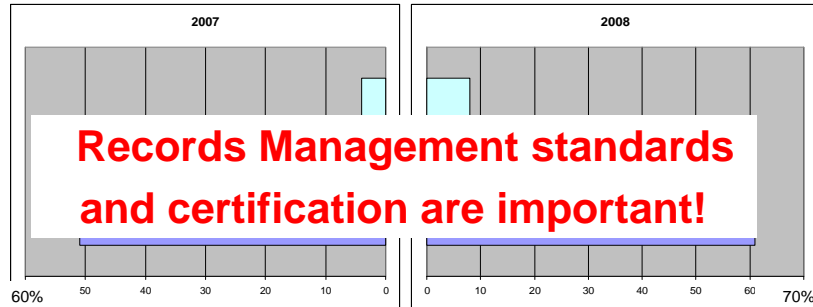
- Local standards are more important
- RM Standards are somehow important
- RM Standards + Certification are important
- To comply with DoD, MoReq etc. is essential

Multiple select: 144

Multiple select: 161



Roadshow Surveys 2007 & 2008 Importance of Records Management Standards



- Local standards are more important
- RM Standards are somehow important
- RM Standards + Certification are important
- To comply with DoD, MoReq etc. is essential

Multiple select: 144

Multiple select: 161

Selected Results from the Market Study



Web based Market Study

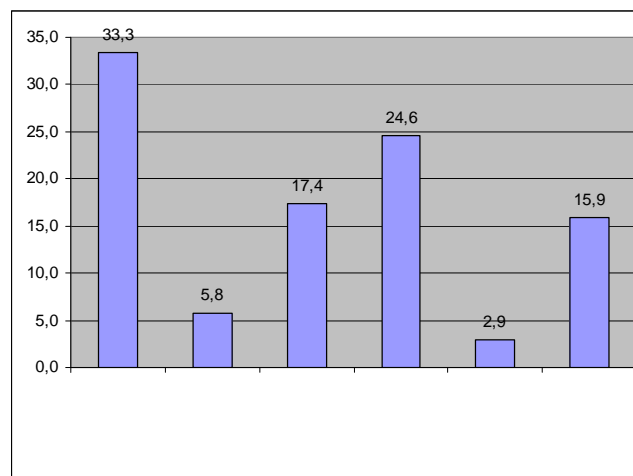
First we made clear, what Records Management is

- giving the ISO 15489 Definition
- an explanatory text
- links to additional articles and presentations

- and started with the questions about the perception, knowledge about the term, terminology issues etc.

Web based market Study Planning of RM: User

Do you plan to install a Records Management system within the next two years?



Single select: 43



Web based market Study Planning of RM: User

Do you plan to install a Records Management system within the next two years?



Single select: 43

Web based Market Study Summary of Planning and adoption of RM: User Combination of 2 questions ...

Alle Angaben in %		2009					
		zu erweitern	durch ein anderes System abzulösen	erstmalig einzuführen	unverändert zu belassen	nicht einzuführen, da kein RM System benötigt wird	keine Angabe
installiert		32,0%	6,0%	17,0%	26,0%	3,0%	16,0%
vor 2003	43,5%	12%	3%		23%		6%
2004	2,9%	3%					
2005	10,1%	6%	3%				1%
2006	2,9%	3%					
2007							
2008	11,6%	6%			3%		3%
kein RM System vorhanden	29,0%	3%		14%	3%	3%	6%

to enhance to replace to install first time no change of existing system not to install no answer

Single select: 43



Web based Market Study
Summary of Planning and adoption of RM:
User
Combination of 2 questions ...

Alle Angaben in %

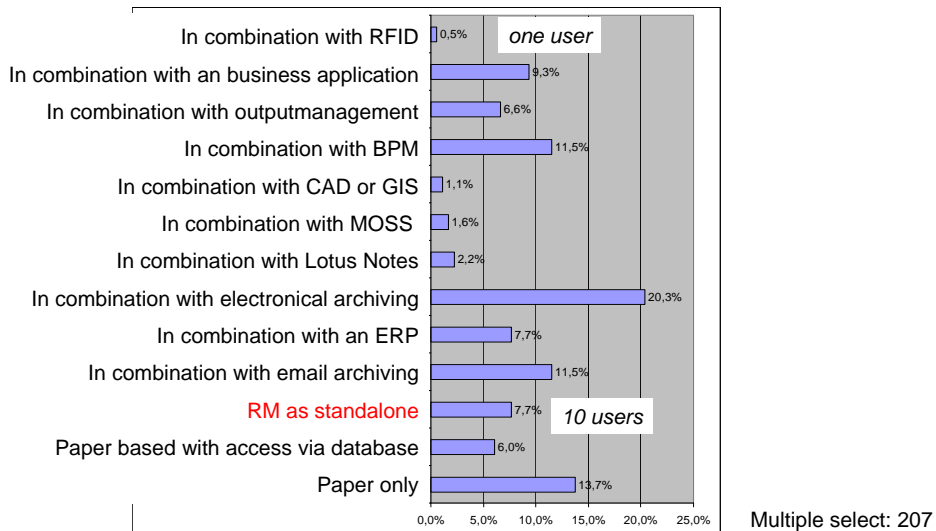
	2009	zu erweitern	durch ein anderes System abzulösen	erstmal einzuführen	unverändert zu belassen	nicht einzu- führen, da kein RM System be- nötigt wird	keine An- gabe
installiert		32,0%	6,0%	17,0%	26,0%	3,0%	16,0%
vor 2003	43,5%	12,7%	3%		23%		6%
2004	2,9%	3%					
2005	10,1%	6%	3%				1%
2006	2,9%	3%					
2007							
2008	11,6%	6%			3%		3%
kein RM System vorhanden	29,0%	3%		14%	3%	3%	6%

13

to enhance
to replace
to install
first time
no change of
existing
system
not to install
no answer

Single select: 43

Web based Market Study
Use of RM: User
 How does your company uses Records
 Management?

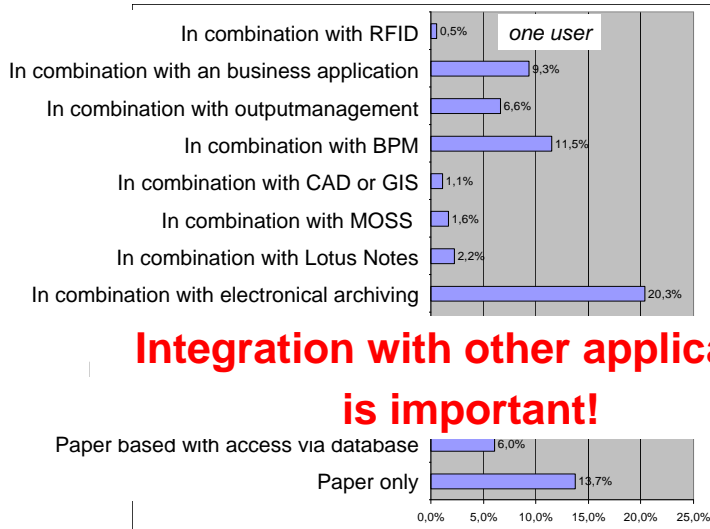




Web based Market Study

Use of RM: User

How does your company uses Records Management?

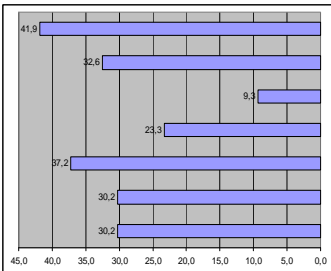
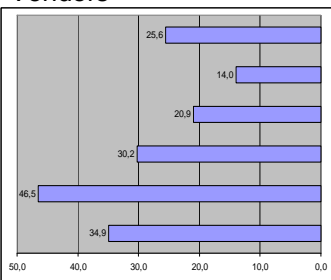


**Integration with other applications
is important!**

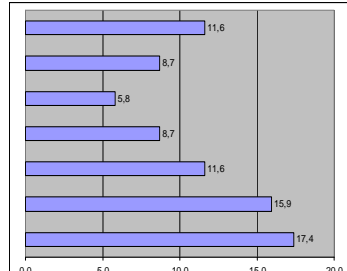
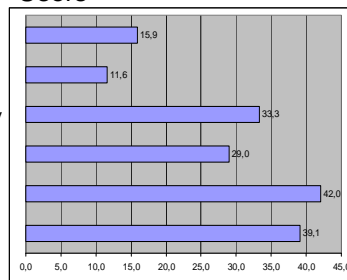
Web based Market Study

Compliance relevance (high)

Vendors

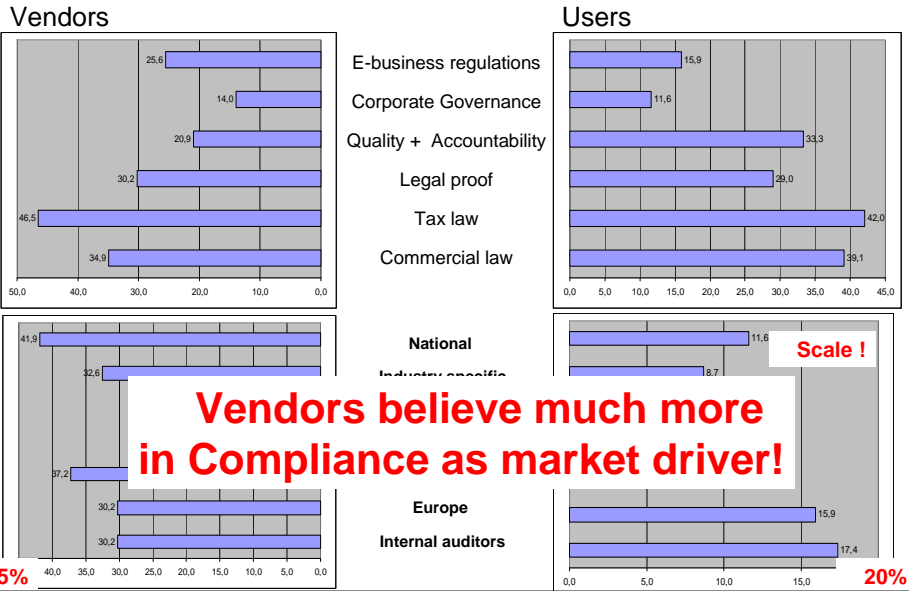


Users





Web based Market Study Compliance relevance (high)



Web based market Study Relevance: User

Wie schätzen Sie die Wichtigkeit und Relevanz der Nutzung eines Records Management Systems in Bezug auf folgende Themen ein:

Alle Angaben in %	keine	niedrig	mittel	hoch	keine Angabe
Compliance		2,9	31,9	50,7	14,5
Vorgaben der Wirtschaftsprüfer	2,9	23,2	31,9	21,7	20,3
Corporate Governance		13,0	34,8	20,3	31,9
Transparenz im Unternehmen		5,8	29,0	56,5	8,7
Nachvollziehbarkeit des Handelns		5,8	29,0	55,1	10,1
Risiko-Management		17,4	31,9	33,3	17,4
Wettbewerbsfähigkeit erhöhen	8,7	26,1	33,3	17,4	14,5
Innovationsfähigkeit stärken	8,7	23,2	29,0	15,9	23,2
Elektronisch unterstützte Prozesse		2,9	36,2	58,0	2,9
Audit-Trails	2,9	8,7	26,1	40,6	21,7
Sicherheit der Informationen			20,3	73,9	5,8
Wirtschaftlichkeit		29,0	33,3	29,0	8,7
Business Continuity		11,6	42,0	26,1	20,3
E-Commerce	5,8	31,9	31,9	2,9	27,5
Informationszugriff verbessern		2,9	17,4	73,9	5,8
Ortsunabhängige Informationsnutzung	5,8	20,3	20,3	47,8	5,8
Nutzungskontrolle	8,7	27,5	26,1	29,0	8,7
Kontrollierte Informationsvernichtung		8,7	31,9	50,7	8,7
Wissensmanagement	5,8	27,5	23,2	31,9	11,6

Multiple select



Web based market Study Relevance: User

Wie schätzen Sie die Wichtigkeit und Relevanz der Nutzung eines Records Management Systems in Bezug auf folgende Themen ein:

Alle Angaben in %	keine	niedrig	mittel	hoch	keine Angabe
Compliance		2,9	31,9	50,7	14,5
Vorgaben der Wirtschaftsprüfer	2,9	23,2	31,9	21,7	20,3
Corporate Governance		13,0	34,8	20,3	31,9
Transparenz im Unternehmen		5,8	29,0	56,5	8,7
Nachvollziehbarkeit des Handelns		5,8	29,0	55,1	10,1
Risiko-Management		17,4	31,9	33,3	17,4
Wettbewerbsfähigkeit erhöhen					14,5
Innovationsfähigkeit stärken					23,2
Elektronisch unterstützte Prozesse					2,9
Audit-Trails					21,7
Sicherheit der Informationen					5,8
Wirtschaftlichkeit		29,0	33,3	29,0	8,7
Business Continuity		11,6	42,0	26,1	20,3
E-Commerce	5,8	31,9	31,9	2,9	27,5
Informationszugriff verbessern		2,9	17,4	73,9	5,8
Ortsunabhängige Informationsnutzung	5,8	20,3	20,3	47,8	5,8
Nutzungskontrolle	8,7	27,5	26,1	29,0	8,7
Kontrollierte Informationsvernichtung		8,7	31,9	50,7	8,7
Wissensmanagement	5,8	27,5	23,2	31,9	11,6

This is only to give you an impression of detail ...

Multiple select

Web based market Study Relevance: User

Wie schätzen Sie die Wichtigkeit und Relevanz der Nutzung eines Records Management Systems in Bezug auf folgende Themen ein:

Alle Angaben in %	keine	niedrig	mittel	hoch	keine Angabe
Compliance in general				50,7	14,5
Vorgaben der Wirtschaftsprüfer	2,9	23,2	31,9	21,7	20,3
Corporate Governance		13,0	34,8	20,3	31,9
Transparenz im Unternehmen			Transparency	56,5	8,7
Nachvollziehbarkeit des Handelns		5,8	Auditability	55,1	10,1
Risiko-Management		17,4	31,9	33,3	17,4
Wettbewerbsfähigkeit erhöhen	8,7	26,1	33,3	17,4	14,5
Innovationsfähigkeit stärken	8,7	23,2	29,0	15,9	23,2
Elektronisch unterstützte Prozesse			Process support	58,0	2,9
Audit-Trails	2,9	8,7	26,1	40,6	21,7
Sicherheit der Informationen			Information security	73,9	5,8
Wirtschaftlichkeit		29,0	33,3	29,0	8,7
Business Continuity		11,6	42,0	26,1	20,3
E-Commerce	5,8	31,9	31,9	2,9	27,5
Informationszugriff verbessern			Better access to information	73,9	5,8
Ortsunabhängige Informationsnutzung	5,8	20,3	20,3	47,8	5,8
Nutzungskontrolle	8,7	27,5	26,1	29,0	8,7
Kontrollierte Informationsvernichtung		8,7	31,9	50,7	8,7
Wissensmanagement	5,8	27,5	23,2	31,9	11,6

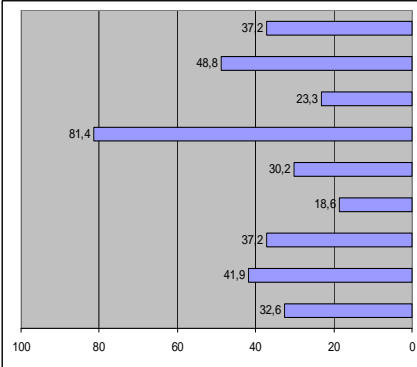
High values ...

Multiple select

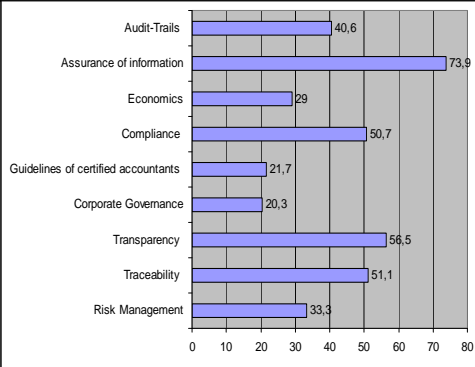


Relevance and importance for the use of RM (high)

Vendors

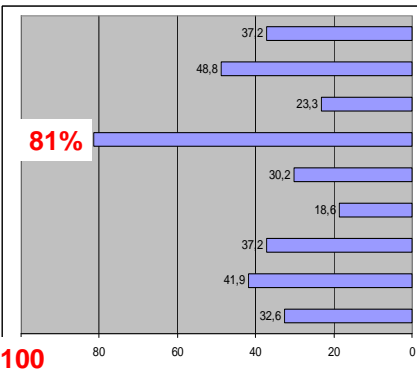


User

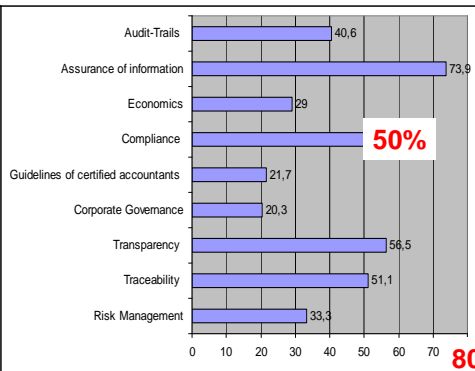


Relevance and importance for the use of RM (high)

Vendors



User



**And again ...
Vendors overrating
the Importance of Compliance Issues!**



Web based Market Study Which standards are important?: User

Alle Angaben in %	keine	low	middle	high	No statements
ISO 15489 (Records Management Norm)	2,9	5,8	31,9	40,6	18,8
MoReq Model Requirements (European Commission)	2,9	11,6	39,1	17,4	29,0
DoD 5015.2 (USA Department of Defense)	26,1	20,3	5,8	2,9	44,9
EDM/ERM Functional Requirements (AIIM Verbandsempfehlung)	11,6	23,2	11,6		53,6
ANSI TR31-2004 (Rechtliche Anerkennung von Records, die von IT-Systemen produziert wurden)	17,4	8,7	27,5	8,7	37,7
ISO 15801 (Elektronisch gespeicherte Informationen - Empfehlungen für Glaubwürdigkeit und Zuverlässigkeit)	8,7	8,7	20,3	27,5	34,8
ISO 17421 OASIS (Open Archive Information System, Norm für elektronische Archivsysteme)	8,7	18,8	26,1	14,5	31,9
ISO/TR 18492 (Langzeiterhaltung elektronischer dokumentenbasierter Information)	5,8	20,3	23,2	20,3	30,4
ISO 23081 (Records Management Prozesse, Metadaten für Records)	5,8	11,6	23,2	20,3	39,1
DOMEA (öffentliche Verwaltung in Deutschland)	23,2	8,7	30,4	8,7	29,0
ELAK (öffentliche Verwaltung in Österreich)	30,4	8,7	11,6	5,8	43,5
Gever (öffentliche Verwaltung in der Schweiz)	26,1	11,6	8,7	8,7	44,9
Branchenspezifische Standards	8,7	14,5	11,6	21,7	43,5
Interne Standards des Unternehmens (z.B. SOPs Standard Operation Procedures)	11,6	15,9	11,6	26,1	34,8

Multiple select

Web based Market Study Which standards are important?: User

Alle Angaben in %	keine	low	middle	high	No statements
ISO 15489 (Records Management Norm)			31,9	40,6	18,8
MoReq Model Requirements (European Commission)			39,1	17,4	29,0
DoD 5015.2 (USA Department of Defense)	26,1	20,3	5,8	2,9	44,9
EDM/ERM Functional Requirements (AIIM Verbandsempfehlung)	11,6	23,2	11,6		53,6
ANSI TR31-2004 (Rechtliche Anerkennung von Records, die von IT-Systemen produziert wurden)	17,4	8,7	27,5	8,7	37,7
ISO 15801 (Elektronisch gespeicherte Informationen - Empfehlungen für Glaubwürdigkeit und Zuverlässigkeit)	8,7	8,7	20,3	27,5	34,8
ISO 17421 OASIS (Open Archive Information System, Norm für elektronische Archivsysteme)	8,7	18,8	26,1	14,5	31,9
ISO/TR 18492 (Langzeiterhaltung elektronischer dokumentenbasierter Information)	5,8	20,3	23,2	20,3	30,4
ISO 23081 (Records Management Prozesse, Metadaten für Records)	5,8	11,6	23,2	20,3	39,1
DOMEA (öffentliche Verwaltung in Deutschland)			30,4	8,7	29,0
ELAK (öffentliche Verwaltung in Österreich)	30,4	8,7	11,6	5,8	43,5
Gever (öffentliche Verwaltung in der Schweiz)	26,1	11,6	8,7	8,7	44,9
Branchenspezifische Standards	8,7	14,5	11,6	21,7	43,5
Interne Standards des Unternehmens (z.B. SOPs Standard Operation Procedures)	11,6	15,9	11,6	26,1	34,8

Multiple select



Web based Market Study Which standards are important?: Vendors

Alle Angaben in %	keine	low	middle	high	No statement
ISO 15489 (Records Management Norm)		11,6	25,6	32,6	30,2
MoReq Model Requirements (European Commission)		14,0	14,0	53,5	18,6
DoD 5015.2 (USA department of defense)	9,3	4,7	18,6	30,2	37,2
EDM/ERM Functional Requirements (AIIM Verbandsempfehlung)	7,0	30,2	4,7	9,3	48,8
ANSI TR31-2004 (Rechtliche Anerkennung von Records, die von IT-Systemen produziert wurden)	4,7	25,6		9,3	60,5
Elektronisch gespeicherte Informationen - Empfehlungen für Glaubwürdigkeit und Zuverlässigkeit)	9,3	20,9	18,6	9,3	41,9
ISO 17421 OAIS (Open Archive Information System, Norm für elektronische Archivsysteme)	4,7	14,0	11,6	18,6	51,2
ISO/TR 18492 (Langzeiterhaltung elektronischer dokumentenbasierter Information)	11,6	7,0	16,3	9,3	55,8
ISO 23081 (Records Management Prozesse, Metadaten für Records)		23,3	20,9	9,3	46,5
DOMEA (öffentliche Verwaltung in Deutschland)		16,3	30,2	9,3	44,2
ELAK (öffentliche Verwaltung in Österreich)	14,0		16,3	4,7	65,1
Gever (öffentliche Verwaltung in der Schweiz)	14,0		9,3	16,3	60,5
Branchenspezifische Standards		4,7	27,9	20,9	46,5
Standards von Unternehmensgruppen	4,7	9,3	20,9	4,7	60,5

Multiple select

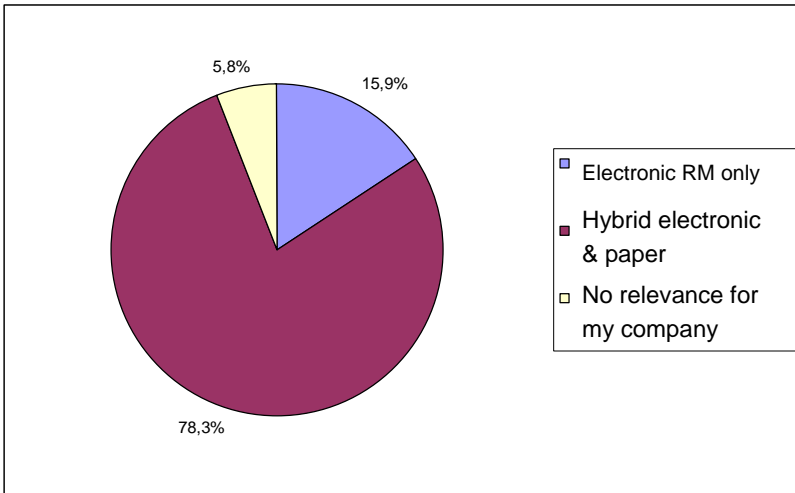
Web based Market Study Which standards are important?: Vendors

Alle Angaben in %	keine	low	middle	high	No statement
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MoReq Model Requirements (European Commission)				53,5	18,6
DoD 5015.2 (USA department of defense)	9,3	4,7	18,6	30,2	37,2
EDM/ERM Functional Requirements (AIIM Verbandsempfehlung)	7,0	30,2	4,7	9,3	48,8
ANSI TR31-2004 (Rechtliche Anerkennung von Records, die von IT-Systemen produziert wurden)	4,7	25,6		9,3	60,5
Elektronisch gespeicherte Informationen - Empfehlungen für Glaubwürdigkeit und Zuverlässigkeit)	9,3	20,9	18,6	9,3	41,9
ISO 17421 OAIS (Open Archive Information System, Norm für elektronische Archivsysteme)	4,7	14,0	11,6	18,6	51,2
ISO/TR 18492 (Langzeiterhaltung elektronischer dokumentenbasierter Information)	11,6	7,0	16,3	9,3	55,8
ISO 23081 (Records Management Prozesse, Metadaten für Records)		23,3	20,9	9,3	46,5
DOMEA (öffentliche Verwaltung in Deutschland)			30,2	9,3	44,2
ELAK (öffentliche Verwaltung in Österreich)	14,0		16,3	4,7	65,1
Gever (öffentliche Verwaltung in der Schweiz)	14,0		9,3	16,3	60,5
Branchenspezifische Standards		4,7	27,9	20,9	46,5
Standards von Unternehmensgruppen	4,7	9,3	20,9	4,7	60,5

Multiple select



**Web based Market Study
Importance of RM and the management
of paper documents: User**



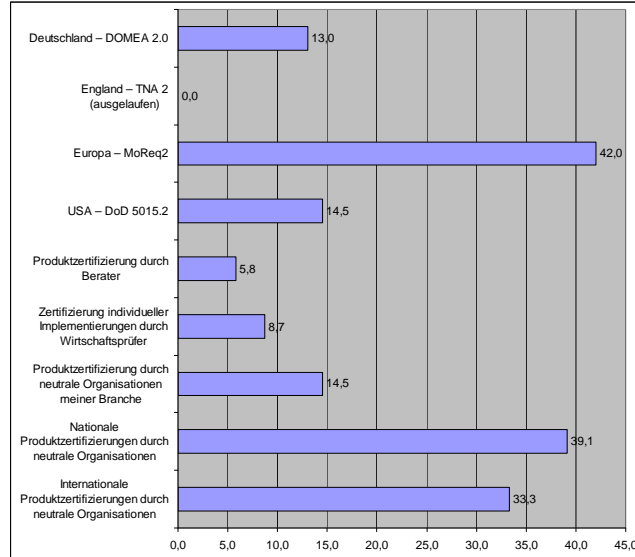
Single select: 43

**Web based Market Study
Importance of RM and the management
of paper documents: User**

**The combined Management
of Electronic and Paper Records
is a major Issue!**

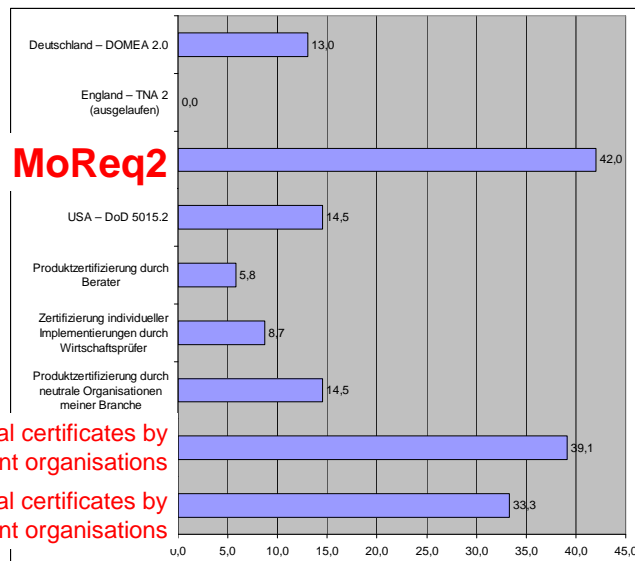


Web based Market Study Certification: User (High Importance only)



Multiple select: 144

Web based Market Study Certification: User (High Importance only)



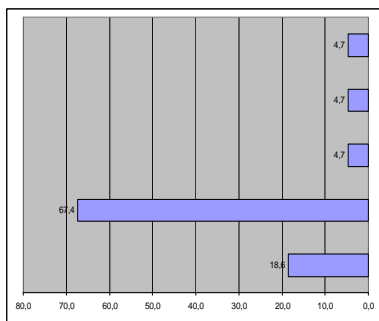
Multiple select: 144



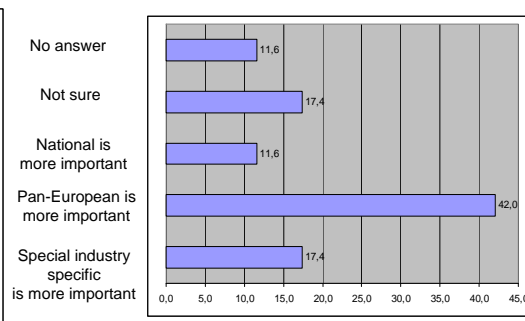
Web based Market Study Relevance of MoReq2 in DACH

Is a pan-European standard more important than a national standard?

Vendors



User



**A pan-European Standard
is more important than
national standards!**

Web based Market Study

Some further results compressed ...

- There is a strong tendency not to translate Records Management into „Schriftgutverwaltung“ but to keep the terms „Record“ and „Records Management“
- The vendors have more functionality than requested, especially in regard to the optional modules. To create MoReq2 compliant products should not be such a big issue
- To use Records Management in daily operations is more important than archival or compliance issues
- ...



Roadshow Surveys Web based Market Study

All results are available on <http://www.Moreq2.de>

- Full slide documentation (PDF) in the Roadshow 2008 handout
- Complete recording (Video, Multimedia, Slides, Audio) of the presentation

... in German ...

... if you have problems finding the right documents, send me an email and I will provide direct links ...



Consequences



... to make MoReq2 a success in Germany, Austria and Switzerland

- (1) We need the MoReq2 translation into the German language to improve acceptance – including a Chapter „0“ for all three: Germany, Austria and Switzerland, with proper translation and referencing of terminology

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- (1) We need the MoReq2 translation into the German language to improve acceptance – including a Chapter „0“ for all three: Germany, Austria and Switzerland, with proper translation and referencing of terminology
- (2) We need a „MoReq2 for Beginners“ book for better education and argumentation in regard to:
 - MoReq2 has a practical value
 - MoReq2 is not complex
 - MoReq2 is efficient
 - MoReq2 is supporting your business
 - MoReq2 reduces your risks in regard to compliance
 - MoReq2 architecture and functionality can be used as well with „modern“ user interfaces and applications
 - MoReq2 software can be certified to secure your investments



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- (5) We need the German ECM-Industry to support MoReq2





Records Management market study for Germany, Austria and Switzerland
Dr. Ulrich Kampffmeyer
DLM Forum Conference
Toulouse, Decembre 11th 2008



Thank you very much for your attention!

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Presentation slides, Newsletter, Information ...
www.PROJECT-CONSULT.com

DLM Forum
RM
Dr. Ulrich Kampffmeyer

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