

Analysts



Meta4 in the eyes of key analysts. Recent Studies.

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EMERGING TECHNOLOGY ANALYSIS: RAPID INNOVATION DRIVES THE HCM VISUALIZATION SOFTWARE MARKET IN 2009 (NOVEMBER 2009)

CURRENT COMPETITIVE LANDSCAPE

HCM visualization capabilities are currently being delivered through two main channels:

- Stand-alone vendors that integrate with major ERP/HRM systems – These vendors provide an enhanced user interface and enable the user to address more-complex HR tasks, such as succession planning. Typically, these solutions address HR and management needs. These applications sit on top of an ERP/HRM system, leveraging this as the system of record. Example vendors include Aquire, HumanConcepts and Nakisa.
- Talent and performance management vendors – Leading talent and performance management vendors offer strong visualization capabilities as part of their offerings. **The talent management space demands easy-to-use functionality for line managers and employees**, so strong visualization is an important competitive requirement. **But it's typically limited to visualization within the bounds of the talent/performance application.** Example vendors include Authoria, Cezanne Software, Cornerstone OnDemand, Taleo, Saba, SuccessFactors and Sonar6.

“ This situation is slowly changing, with some pure-play HRM providers beginning to embed some strong visualization technology inside their core platforms. Examples include Meta4...”

Factors That Will Hinder Adoption:

- HCM visualization technology rarely uses information outside of the performance management system/and succession planning function. Until this technology becomes more pervasive across the HCM functional spectrum (or open to additional data sources), it will remain confined to a relatively select number of areas. **This situation is slowly changing, with some pure-play HRM providers beginning to embed some strong visualization technology inside their core platforms. Examples include Meta4, Workday and Ultimate Software.**

TALENT MANAGEMENT SUITE PRODUCT REVIEW (AGUST 2009)

OVERALL ANALYSIS OF THE TALENT MANAGEMENT SUITE:

Strengths:

- A single, global solution for core HR (including payroll) and sophisticated talent management.
- Innovative and highly intuitive user experience providing quick and easy access to information for decision making and planning.
- Deep global support and experience.

Opportunities for Improvement:

- Employee-driven career management and internal networking support.
- Integrate additional social tools to drive adoption of talent management initiatives.

Near-Term Enhancements Planned:

- Embedding predictive analytics to drive decisions.
- Integrating more best practices to minimize deployment costs.
- Extending the powerful user experience for managers and employees to core HR administrative processes.

“ This solution targets mid and large size organizations and is best suited for global and local organizations looking for an integrated HR, Payroll and talent management solution.”

Target Customers / Best Suited:

This solution targets mid and large size organizations and is best suited for global and local organizations looking for an integrated HR, Payroll and talent management solution.



MAGIC QUADRANT FOR EMPLOYEE PERFORMANCE MANAGEMENT SOFTWARE (FEBRUARY 2009)

Meta4, founded in 1991, is privately held, with headquarters in Madrid, Spain. The company is best-known for its core HRMS capabilities (see "MarketScope for Large Enterprise HRMS, 2008"), but it also offers talent management applications, including e-recruitment, performance management, succession management, compensation management and learning. Meta4's PeopleNet v.7 uses an object-oriented architecture (leveraging common standards for connectivity, including XML, SOAP, Component Object Model [COM] and Open Database Connectivity [ODBC]), and the applications can run on Oracle and SQL Server. Meta4 is in the process of adding RIA support to its applications using Windows Presentation Foundation.

“Customers indicated that Meta4 provides better-than-average service and support. In addition, customers highlighted integration between EPM and the core HRMS as best-in-class.”

Approximately 75% of Meta4's customers implement the solution on-premises. However, Meta4 also offers options for hosting, and for a subscription license (approximately 15% of customers have chosen a subscription license). Multinational customers that want to purchase a core HRMS solution, along with EPM solutions, should consider Meta4.

Strengths:

- Performance, compensation and succession management functionality is very good.
- Meta4's technical architecture vision is strong (for example, object-orientation, RIA and other innovations, such as desktop gadgets). However, the delivery for RIA and gadgets is still a work-in-progress.
- Customers indicated that Meta4 provides better-than-average service and support. In addition, customers highlighted integration between EPM and the core HRMS as best-in-class.
- Meta4 has provided data that indicates it is in good financial condition. The company is profitable, has good liquidity and is cash flow positive.

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Cautions:

- Meta4's EPM functionality can be implemented as a stand-alone, but most customers have implemented it in conjunction with the Meta4 HRMS solution. For Meta4 to expand the use of its EPM capabilities beyond its current and prospective HRMS customers, the company needs to build awareness of its stand-alone capabilities.
- Meta4 has a strong presence in Spain, Portugal, and Central and South America, as well as a growing presence in France and the U.K. However, it is still building awareness in the U.S. market.



MARKETSCOPE FOR LARGE ENTERPRISE HRMS (FEBRUARY 2008)

“ ... Meta4’s PeopleNet is most appropriate for multinational customers that want a strong, core HRMS solution; improved talent management capabilities; and the ability to leverage emerging desktop paradigms.”

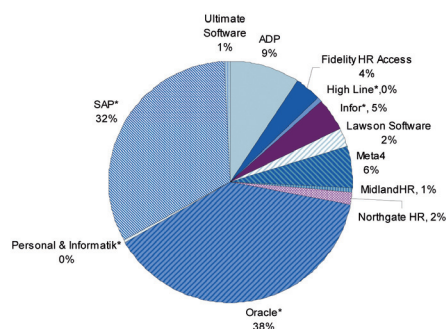
Meta4 is based in Spain, and its HCM solution has a strong presence in Spanish- and Portuguese-speaking countries, as well as in France. It has also expanded into other markets, including the U.K., Scandinavia and the U.S. In the 1990s, Meta4 was a visionary vendor. It was the only vendor to offer a global HR solution, built on an object-oriented architecture, with a strong competency foundation, and integrated (although somewhat lightly) with content and knowledge management. However, in the early 2000s, Meta4 did not show the same leadership on more-recent trends, such as talent management. Today, Meta4 has regained its visionary place by leveraging some of its past success (for example, object-oriented architecture and competency management) with improving talent management and new developments, such as a rich Internet application (RIA) and Web 2.0 technologies.

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PeopleNet 8 will transform the user experience of Meta4 applications, which will be designed around a dashboard-styled interface, and start to integrate Meta4 with external elements, such as Google widgets. Improved and highly accessible end-user reporting and analysis tools also become part of this new interface. HR and organizational management (including self-service) will be the first modules in PeopleNet 8 released in 2Q08. Meta4’s PeopleNet is most appropriate for multinational customers that want a strong, core HRMS solution; improved talent management capabilities; and the ability to leverage emerging desktop paradigms.

Rating: Positive

Licensed Customer Share for Companies With More Than 10,000 Employees



	RATING				
	Strong Negative	Caution	Promising	Positive	Strong Positive
ADP				X	
Fidelity HR Access				X	
High Line			X		
Infor			X		
Lawson Software				X	
Meta4				X	
MidlandHR			X		
Northgate HR				X	
Oracle					X
Personal & Informatik			X		
SAP					X
Ultimate Software				X	

MarketScope for Large Enterprise HRMS, 2008



RANKING OF THE TOP 100 EUROPEAN SOFTWARE VENDORS (NOVEMBER 2008)

Once again, the Truffle 100 brings into focus Europe's dynamic software industry, which more than ever in these uncertain economic times holds out hope for creation of jobs and wealth. The European software industry is distinguished by its capacity for innovation, tremendous technical skills, and highly skilled engineering workforce. These are all advantages in a time of industrial consolidation. But Europe still needs to produce not just one or two but tens of global champions in order to respond to the pressures of competition.

The paradigm changes that are sweeping the industry – from software as a service to open source software – may be Europe's best bet to catch up, since we are strong in these areas. At both national and European levels there is a great willingness to support Europe's software companies. We welcome the arrival of this year's Truffle 100 as a highly regarded and very valuable tool in measuring and highlighting their progress. Viviane Reding (EU Commissioner for Information Society & Media).

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- Meta4 is the number two Spanish company and ranked 76 overall. Only two Spanish companies have qualified for this index, Panda Security and Meta4.
- The study was carried out by IDC, CXP and Truffle, using European company variables like revenue, growth and innovation. The results show the importance that Europe has placed in developing world-wide technology.

Rank	Company	HQ	Revenues 2007 from Software activity (m€)	Total revenues 2007 (m€)	R&D headcount 2007*
51	BASWARE	FI	73.0	73.0	152
52	ESI GROUP	FR	68.9	68.9	196
53	VIZRT LTD.	NO	63.2	63.2	141
54	EXPRIVIA S.p.A.	IT	62.6	62.6	106
55	KEWILL SYSTEMS PLC	UK	61.4	61.4	78
56	FJH AG	DE	60.1	63.3	94
57	CEGEDIM ACTIV (Groupe Cegedim)	FR	60.0	62.2	250
58	UTIMACO SAFEWARE AG	DE	59.2	59.2	106
59	ALPHAMERIC PLC	UK	58.0	58.0	43
60	ORC SOFTWARE AB	SE	57.2	57.2	97
61	SSP HOLDING (Ex Sirius Financial Solutions Plc)	UK	57.0	57.0	97
62	TXT E-SOLUTIONS	IT	55.5	55.5	75
63	SOFTWARE INNOVATION ASA	NO	54.5	54.5	58
64	SOGEI SPA	IT	52.6	331.4	45
65	IONA TECHNOLOGIES	IR	51.8	56.8	97
66	READSOFT	SE	48.5	52.5	89
67	OTRUM ASA	NO	47.5	50.0	85
68	MACRO 4 PLC	UK	46.1	46.1	78
69	DELCAM PLC	UK	43.4	43.4	16
70	PROHA OYJ	FI	43.4	51.0	24
71	BIS (Bond International Software Plc)	UK	43.1	43.1	106
72	SDL	UK	41.6	148.6	253
73	INFOVISTA	FR	39.8	39.8	86
74	TEKLA OYJ	FI	39.3	59.3	101
75	CINECA	IT	39.2	49.0	440
76	META4	SP	38.8	21.8	37
77	CREALOGIX HOLDING AG	CH	37.8	37.8	64
78	ARM HOLDING	UK	37.3	367.6	140
79	ECLA	CH	36.6	38.3	69
80	SAB (GROUPE)	FR	36.0	36.0	200
81	MINORPLANET SYSTEMS PLC	UK	35.7	35.7	25
82	SUPEROFFICE ASA	NO	35.4	39.3	40
83	BOSS MEDIA AB	SE	35.0	35.0	110
84	VIVEO	FR	35.0	55.0	80
85	OPERA SOFTWARE ASA	NO	35.0	35.0	59
86	DEDA GROUP	IT	34.2	85.4	30
87	NORMAN ASA	NO	33.7	33.7	85
88	GRUPPO FORMULA	IT	32.8	32.8	56
89	FINANCIAL OBJECTS PLC	UK	31.0	31.0	4
90	CCS (Clarity Commerce Solutions Plc)	UK	30.7	30.7	48
91	IBS OPENSYSYSTEMS PLC	UK	30.6	30.6	8
92	MACONOMY A/S	DK	30.0	30.0	75
93	ARES	FR	29.1	411.0	55
94	INAZ SRL	IT	29.0	35.2	69
95	ORSYP	FR	28.2	28.2	57
96	AFAS ERP SOFTWARE	NL	27.9	27.9	47
97	MISSLER SOFTWARE	FR	27.1	27.1	80
98	EBP	FR	27.0	27.0	63
99	CAST	FR	26.1	30.6	54
100	ESKER	FR	25.9	25.9	56

(*) IDC ESTIMATE