Magic Quadrant for Content Services Platforms

Published 16 November 2020 - ID G00464767 - 63 min read
By Analysts Michael Woodbridge, Marko Sillanpaa, Lane Severson

Initiatives: Digital Workplace Applications

Integrated, intelligent content services, repository federation and cloud readiness are now driving differentiation and disruption in a long-established market. Application leaders responsible for digital workplace applications should use this report to select the right CSP for their content services strategy.

This Magic Quadrant is related to other research:
Critical Capabilities for Content Services Platforms
View All Magic Quadrants and Critical Capabilities

Market Definition/Description

Gartner defines a content services platform (CSP) as the foundational component in an organization for the management and utilization of content. CSPs provide a way for employees to retrieve and work with content in a modern, seamless way across devices and organizational boundaries. They are integrated into other business applications to support ease of access and provide organizations with a way to consolidate governance and content protection capabilities. CSPs have been most commonly utilized to satisfy operational and business administration requirements. Increasing demands for consolidation means they are also an option to support more collaborative, ad hoc content-centric requirements.

The core capabilities of a CSP include:

- Content repository
- Content management library services
- Records management
- Process automation
- Open APIs
- Security and privacy controls
- Metadata
The optional capabilities of a CSP include:

- Content intelligence
- Productivity intelligence
- New work nucleus connectors
- Business application connectors
- Federation
- PaaS/SaaS deployment

The content services market is well-established, with many vendors having offerings in this space for over 20 years (see Note 1). As such, many of the core capabilities have become commodity features with little differentiation. However, Gartner has recently seen the inclusion of tightly integrated intelligent services starting to provide real differentiation between products in the market. This has surfaced in a number of ways; in classification (content intelligence), in productivity (productivity intelligence) and in content protection (security intelligence).

Additionally, we have seen increased demand from clients to provide cloud-based solutions that integrate into other New Work Nucleus technologies (see Create a Culture of Digital Dexterity With the ‘New Work Nucleus’), which is often a SaaS-based set of applications. Newer entrants to the market have emerged to satisfy these demands. They often take a different approach to areas such as records management and process automation by providing simpler capabilities packaged in a more consumerized user experience.

Gartner therefore defines a set of capabilities that are critical for this market; these are highly differentiated capabilities and are a priority to evaluate when selecting a product in this space. These capabilities are a blend of core and optional, and are reviewed in detail in the corresponding Critical Capabilities for Content Services Platforms. They are:

- Records management
- Content intelligence
Gartner, Inc. | 3993178

11/18/2020

- Productivity intelligence
- Process automation
- Security intelligence
- Open APIs
- Federation
- New work nucleus connectors
- Business application connectors

**Magic Quadrant**

**Figure 1: Magic Quadrant for Content Services Platforms**

Source: Gartner (November 2020)

**Vendor Strengths and Cautions**
Alfresco

Alfresco is a Leader in this Magic Quadrant. Its Digital Business Platform is mainly focused on content-centric business administration and operational use cases. It provides a range of rich services covering content and process services, information governance, and application development.

Its operations are primarily in Europe and North America, with a smaller presence in the Asia/Pacific region. Its clients tend to be large enterprises, with key verticals being government, manufacturing, finance and insurance.

Alfresco has added a PaaS capability to its framework and extended its federation capabilities to provide in-place governance services. It has also made some strategic acquisitions, which have added features such as SAP and Salesforce integration, a new enterprise viewer for real-time annotation and redaction, and business-focused applications.

On 22 October 2020, Hyland announced that it had completed its acquisition of Alfresco. Details of the ongoing strategy are not yet apparent, but Alfresco brings a more developed cloud strategy and a European presence to Hyland. As of publication, Hyland has yet to define how the very different strategies of these vendors will come together. This will likely take at least six months to become fully apparent.

The analysis in this research is based on Alfresco’s activities and performance prior to the acquisition, which is targeted for completion in 4Q20.

Strengths

- **Platform consolidation**: Alfresco has combined the federation of other content services and migration from those content services into a single dashboard, enabling users to search and govern information across multiple disparate repositories. This provides organizations with options, tooling, and a process for migrating and consolidating CSPs within their estate.

- **Technical appeal**: Alfresco’s open-source heritage, rich developer framework, commitment to the developer community and depth of features makes it a consistently strong option for IT-led initiatives looking for a platform to build and extend. Social media analysis highlighted positive sentiment around Alfresco’s Intelligence Services, a set of capabilities designed to enable developers to integrate AI services.

- **Citizen developer process design**: Alfresco extends its rich business process automation capabilities with more user-centric design interfaces, enabling citizen developer activities. This reduces the reliance on technical expertise for business scenarios such as simple approval workflows and content filing. Complex processes can be designed using the full in-depth process design capabilities.

Cautions

- **Digital workplace limitations**: Alfresco’s effectiveness as a tool for ad hoc content management activities is reduced by its limited cloud office suite integration and productivity intelligence
AODocs

AODocs is a Niche Player in this Magic Quadrant. Its CSP, also called AODocs, is built on top of Google Drive. This provides G Suite license holders the ability to add document management, records management and process automation to Google’s existing cloud office capabilities, which lack these capabilities.

The vendor’s operations are primarily in Europe and North America. Its clients tend to be midsize businesses within key verticals including life sciences, manufacturing and education.

AODocs expanded its focus on life sciences this past year by delivering its first vertical solution for quality management. It also released low-code configuration capabilities for process automation and a packaged migration capability.

Strengths

- **CSP with G Suite**: An extensive set of document management, workflow and governance capabilities enables AODocs customers to exploit Google Drive and G Suite content storage and services.

- **Simple and easy to use**: AODocs’ commitment to user experience is evident in the clear and simple UI. More complicated capabilities like governance and process management can be consumed through low-code interfaces, reducing the dependence on dedicated IT resources.

- **True SaaS solution**: AODocs is a true multitenant SaaS solution, and provides clients with a continually evolving platform in the cloud. This benefit, combined with a compelling price point, makes AODocs a good choice for small and midsize businesses (SMBs) looking to standardize on Google’s cloud technologies.

Cautions

- **Dependent on technology partners**: AODocs lacks CSP features present in the offerings of many of the Leaders in this market. This includes a lack of capture capability and a limited range of business application connectors. For capture, it can perform optical character recognition on images saved to capabilities, when compared to the SaaS-native vendors in this market.
the system separately. Customers will need to look to third-party providers to remedy these shortcomings.

- **Cloud-only, dependent on Google**: AODocs is a cloud-only offering and relies on Google Drive or G Suite for its underlying content repository. Potential customers will need to either purchase or bring existing G Suite licenses. There is no option for on-premises deployment, which makes it unsuitable for organizations needing to host their own solutions or implement a hybrid platform.

- **Limited experience at large scale**: AODocs is a small company with only four offices and fewer than 100 employees. It has a relatively small partner network, which includes a mix of channel and technology partners. AODocs’ customer base includes a number of large organizations with enterprise deployments. However, large customers should verify that AODocs and its partners can scale up to meet their requirements, particularly in terms of integration and customization.

**Axway**

Axway is a Niche Player in this Magic Quadrant. AMPLIFY Content Services is available as a hybrid deployment model with a cloud-only control plane and flexible storage layer. The “control plane” provides all of the administrative controls, such as policy definition and enforcement and access rights, as a multitenant SaaS solution. Clients can choose to store their content on-premises, in private SaaS or in multitenant SaaS, or use a managed service from Axway. Its solution for content services provides a range of core services, including collaboration, content management and system integration.

Its operations are primarily in North America and Europe, with a smaller presence in the Asia/Pacific region. Axway’s clients range from small to large global enterprises, with key verticals being financial services, healthcare, government, manufacturing, engineering and construction.

**Strengths**

- **Differentiated vision**: Axway understands that the value of content services is in its ability to provide a centralized capability for core services and policy creation and enforcement. The storage of documents and data can be flexible enough to support customer’s requirements for security, governance or data residency, supporting customers with personally identifiable information (PII) data in highly regulated industries, including modernizing legacy storage technology.

- **Cost-effective**: AMPLIFY Content Services is one of the most cost-effective solutions that Gartner evaluated. The platform could be used to augment existing investments in cloud office solutions or legacy content services without becoming financially onerous.

- **Integration framework**: AMPLIFY Content Services provides an approach of integrating both SaaS and hybrid systems to many applications, along with the use of low-code/no-code methods to create process and integration flows. Additionally, AMPLIFY Content Services supports integrations into several CSP platforms and content collaboration tools, including SharePoint, Google Drive, Box, Dropbox, OpenText and Alfresco.
**Cautions**

- **Immature in several CSP capabilities:** AMPLIFY Content Services lacks comparable maturity with the rest of the market in several capabilities, including process automation, records management and capture. In some use cases (such as process automation and records management), the tool is basic. In other areas (like capture and content intelligence), AMPLIFY Content Services depends on third-party support from the likes of Amazon Textract.

- **Complex licensing model:** Axway offers a flexible services-based approach to its solution packaging that quickly becomes complicated. AMPLIFY Content Services includes AMPLIFY base capabilities, AMPLIFY Content Services and a range of add-ons depending on the customer use case. Some of the add-ons are also full stand-alone products such as Managed File Transfer and Application Integration. Customers may find it difficult to benchmark Axway's platform capabilities against other competitors in this market.

- **Lack of content services applications:** Axway does not currently have any out-of-the-box solutions for vertical or horizontal use cases. Some clients are using the platform to support a variety of document management use cases, but these are not prepackaged capabilities, and may lack specialist features provided by, for example, contract management or HR document management systems.

**Box**

Box is a Leader in this Magic Quadrant. Its Box Digital Business Suite, consisting of Box Enterprise, Box Governance, Box Shield, Box Relay, Box Premier Services, Box Zones and Box Platform, is available as SaaS.

The vendor's operations are primarily in North America, with some presence in Europe and Asia. It supports clients from SMBs to large enterprises, with key verticals being financial services, life sciences and public sector.

Box has released a new, internally developed version of its workflow capability Box Relay. It has also released Box Shield, which provides enhanced security capabilities such as built-in data loss prevention, malware detection and download restrictions.

**Strengths**

- **Ease of use:** User experience is a key differentiator in a mature market. Box continues to keep user experience as one of its core value propositions, even as it releases more complex functionality. This includes intelligent security capabilities and deeper integrations into third-party business applications like Salesforce and ServiceNow. Ease of use is consistently raised as a positive on social media channels. This is especially important for organizations pursuing broad adoption for their CSPs.

- **Built for builders:** The Box Platform is a SaaS-based CSP with a strong software development kit (SDK) and API for building custom content services applications. These can be opened to an extended range of participants, including employees, partners and customers outside the firewall. Prebuilt integration guides enable citizen developers to realize business benefits more quickly.
**Strong new work nucleus connectors:** Box has prebuilt application integration for all of the cloud productivity suites, including Microsoft (Office 365), Google (G Suite) and Apple (iWork). Additionally, it has connectors for popular collaboration tools, such as Slack and Asana, to surface Box content directly in those applications.

**Cautions**

- **Lack of federation:** Box has no native federation capabilities. Although it provides many prebuilt connectors and open APIs, clients looking to use the CSP as a control plane to manage administrative policies for other CSPs in their environment will need to work with a third-party tool or alternative provider.

- **Capability maturity:** Box continues to lag behind in several key CSP capabilities, including records management and workflow. The Box Relay workflow product currently does not natively support complex business process management or case management, and works only with the Box repository. Box has integrations with vendors across the business process management (BPM), robotic process automation (RPA), integration platform as a service (iPaaS) and low-code application development markets to allow customers to address these gaps.

- **Geofencing limitations:** Data residency capabilities inherent in the Box Zones module are limited to content only. Metadata stored in Box, along with the rest of the control plane, is stored in the vendor’s U.S. data centers. As metadata and classification capabilities grow within the platform, this could become a concern for international organizations with strict regulatory requirements concerning data location.

**DocuWare**

DocuWare is a Niche Player in this Magic Quadrant. It focuses its CSP on tackling and automating business administration scenarios. It is strong across all content services capabilities except for federation.

The vendor’s operations are primarily in Europe and North America, with a smaller customer base in Africa, Asia and Australia. The majority of its clients tend to be SMBs with wide distribution across all verticals.

DocuWare was acquired in August 2019 by Ricoh; however, it operates as an autonomous business unit within the wider Ricoh group. Recent DocuWare investments have included enhancements to its configuration tool and the development of cloud-based business solutions for the French market.

**Strengths**

- **Business value:** DocuWare focuses on accelerating the time taken to achieve business value by delivering preconfigured business solutions and workflows that are well-aligned with the demands of its client base. SMB clients looking to automate horizontal processes such as accounts payable, supply chain and HR will find these valuable.
Management and implementation simplicity: Docuware provides a simple way to perform many of the tasks that can be quite complex in other leading CSP products. Administration, workflow design, forms creation and records management planning can all be performed from a single web-based administration tool. This is particularly valuable for organizations with limited IT capacity.

SaaS feature parity: DocuWare has a long-standing SaaS platform. Its SaaS and on-premises products have feature parity, so customers can deploy either without sacrificing capabilities.

Cautions

Office 365 differentiation in the SMB market: Clients could find it difficult to justify expenditure on DocuWare when Microsoft 365 is already present in the business, and where Microsoft’s workflow and records management are fulfilling client needs. This is even more apparent in DocuWare’s target SMB market segment, where budgets are tight.

Dated user experience: The UI for DocuWare looks dated compared to Leaders in this Magic Quadrant. Additionally, mobile capabilities are limited to the more basic CSP features such as document management. Clients should evaluate the product experience, initially with demos, proofs of concept (POCs) and possible pilots, to ensure it meets increasing user expectations for a consumer-like experience.

Limited enterprise relevance: DocuWare is rarely deployed as a foundational platform for large enterprises. Its focus is on SMBs and departmental sales. Clients considering rolling out DocuWare across a large organization should seek further assurance via case studies and customer references.

Hyland

Hyland is a Leader in this Magic Quadrant. Its flagship product, OnBase, is a CSP designed to manage formal, operational and business administration content, processes and cases. Hyland provides a broad range of rich services covering content and process, information governance, and collaboration from OnBase and other content services offerings in its portfolio.

Its operations are primarily in North America, with a growing presence in Europe. Its clients tend to be enterprises, with key verticals being healthcare, insurance, financial services, government, higher education and commercial (such as retail and manufacturing).

Hyland has now harmonized its release process across the portfolio as an evolutionary step in the modernization of its platform. In October 2020, it released Hyland Experience Capture (HxC), the first application on its new cloud-based Hyland Experience Platform (HxP).

On 22 October 2020, Hyland announced that it had completed its acquisition of Alfresco. Details of the ongoing strategy are not yet apparent, but Alfresco brings a more developed PaaS strategy and expands Hyland’s European presence to Hyland. As of publication, Hyland has yet to define how the very different strategies of these vendors will come together. This will likely take at least six months to become apparent.
The analysis in this report is based on Hyland's activities and performance prior to the acquisition, which is targeted for completion in the final quarter of 2020.

**Strengths**

- **Industry expertise**: Hyland focuses on a number of key verticals, including healthcare, insurance, financial services, government, higher education and commercial, and does so in a deep, integrated way. It has dedicated business units for these areas, which coordinate the entire go-to-market process and solution development. Clients benefit from a cohesive set of messaging and solutions for their specific business challenge.

- **Governance adoption**: Hyland has released Governance Rules as a Service (GRaaS) in partnership with Iron Mountain. This is a highly differentiated offering, enabling end users to implement and maintain retention rules directly within OnBase based on actual legislation. This helps when translating legislative requirements into actual, configured and executable working policies.

- **Integration depth**: Hyland has a broad range of line-of-business integrations that provide deep levels of functionality. These include Duck Creek, Guidewire, Epic, Oracle ERP Cloud, Salesforce, SAP and Workday, among others. This is in addition to deep integration into productivity tools such as Microsoft Outlook and G Suite.

**Cautions**

- **Developing cloud presence**: Hyland’s cloud offering trails some other Leaders in this market. Today, there are no SaaS or PaaS self-service provisioning options for OnBase, which may increase hosting and management costs. The first iteration of the next-generation multitenant SaaS platform is scheduled for release in the final quarter of 2020; however, its initial release is limited to a single capture-based application. Hyland has other multitenant SaaS products in the portfolio.

- **Commercial cost and complexity**: Hyland’s platform is among the most expensive in the content services market. Its proposals often contain a complex bill of materials and licensing metrics that make it difficult to analyze overall value. Hyland has made improvements to simplify this and provide value transparency with licensing bundles. This pricing was released in 2020 and is early in its rollout. It does not yet make up the majority of Hyland proposals that are reviewed by Gartner.

- **Growing geographical presence**: Compared to other established Leaders in this Magic Quadrant, Hyland's presence is limited in territories outside of North America. The majority of its implementation partners and a majority of its customers are based in North America. Hyland's EMEA customer base has grown, primarily due to acquisition, and this presence will increase as the Alfresco acquisition completes. Hyland is continuing to grow its international partner footprint and is increasingly working with global system integrators. However, clients outside of North America need to ensure that they have access to the right level of skills and resources for any project undertaken.
IBM is a Visionary in this Magic Quadrant. Its IBM Cloud Pak for Automation is focused on business automation use cases. It includes IBM FileNet Content Manager (document management), IBM Enterprise Records (records management), IBM Business Automation Workflow (process automation), IBM Business Automation Insights (reporting) and IBM Business Automation Content Analyzer (content intelligence to support content services use cases).

IBM’s primary CSP markets are North America and Europe, followed by Australia and New Zealand. Its key vertical markets are financial services, government, insurance and high tech.

IBM has added a common development environment for Cloud Pak for Automation that allows both nontechnical business users and developers to incorporate content services into their automation applications.

**Strengths**

- **Global presence:** IBM has a global presence and an extensive footprint of large-scale enterprise deployments. IBM’s own professional services and its large, international partner network provide implementation expertise, services (such as hosting) and purpose-built business solutions built on top of the platform.

- **Extensive customer base:** IBM is one of the five largest content services providers, with established clients in nearly all industry categories. IBM has developed a digital business automation client council consisting of 75 companies that provides product feedback and helps to prioritize research and development investments.

- **Strength in automation and governance:** IBM scored best in the market for its automation capabilities, including a low-code application and process automation development capability. Additionally, it exhibits best-in-class governance capabilities. These are enhanced by a strong machine learning engine that provides file analytics capabilities to assess documents and assign records classifications with little human intervention.

**Cautions**

- **Declining market share:** According to Gartner’s analysis, IBM is one of two vendors in the content services market share analysis with a declining market share (see the Recommended by the Author section). This correlates with data collected from Gartner client inquiries. Most IBM clients who speak to Gartner do not see Cloud Pak for Automation or FileNet Content Manager as strategic platforms, and are evaluating alternative solutions. Gartner’s social media analysis indicated a decline in conversation volumes for IBM’s content services capability since 2018.

- **Lack of content services sales support:** Gartner hears regular and consistent feedback from IBM content services clients that they are frustrated with the level of account management and sales support offered to assist their initiatives. They commonly report a lack of sufficiently detailed, content-services-specific knowledge. This lack of available sales expertise causes new prospects to overlook the platform and existing customers to seek alternative solutions due to lack of clarity over modernization options.
Diluted content services marketing vision: IBM’s marketing vision obscures the role of content services within messaging around broad “digital” objectives, rather than clarifying it. In the past four years, IBM has rebundled and rebranded its CSP three times — from Enterprise Content Management (ECM), to IBM Automation Platform for Digital Business, and now to Cloud Pak for Automation. It is equally difficult to find relevant information on content services from other IBM marketing and sales avenues such as events or the corporate website.

iManage

iManage is a Niche Player in this Magic Quadrant. iManage focuses its CSP on business areas where formal document production is the primary business deliverable. This has historically been legal, but also includes industries such as accounting and financial services. It provides a broad range of content services features.

The majority of its operations are in North America and Europe; however, there is a presence in the Asia/Pacific region and Latin America. The majority of its implementations are less than 1,000 users due to its focus on serving a specific set of somewhat niche requirements that address highly regulated industries or departments such as legal, audit, compliance and HR. This installed base is across a range of SMB and enterprise clients.

iManage has focused on increasing the integration of its AI-driven solutions (via RAVN) and enhancing user adoption with Microsoft Teams Integration and iManage Drive, a file-system-based UI.

Strengths

- **Tight email integration:** With iManage’s focus on the legal market, the core UI for users is a responsive web interface, tightly integrated with Microsoft Office and Outlook. Automatic email filing is provided utilizing both email metadata and AI to suggest the appropriate location for filing. Documents and emails are integrated into unified project workspaces to provide a single view into both. Clients looking to support content services use cases centered around Outlook will find this very important.

- **Policy security model:** The vendor provides a flexible, policy-driven security model that utilizes metadata to dynamically change levels of access to content. This provides a more granular and flexible access model than traditional techniques and supports “need to know” initiatives. This is desirable for organizations with complex access control models (such as those in intellectual property [IP]-sensitive industries such as energy, entertainment and financial services) or where ethical walls need to be enforced.

- **Embedded AI:** Its RAVN AI, which extracts information from legal documents for classification, is integrated with iManage Work. RAVN is primarily targeted at the legal market and clients looking for an integrated approach, especially with legal use cases, will find this advantageous.

Cautions

- **Legal-only line-of-business integrations:** The vendor’s business application connectors are limited to those used for legal use cases. Clients looking for a foundational platform that integrates with other
more general business applications could find that it limits adoption.

- **Limited workflow**: Its workflow is limited to a specific use case: new business intake. Organizations that plan to use workflow for general usage across the organization will need to integrate third-party products.

- **Pricing**: The vendor’s pricing for large enterprises is high compared to competitors in this market. The costs are more comparable at lower user counts (for example, at less than 100 users, where other vendor discounts are minimal). Organizations looking to address larger user groups may find value in iManage as a domain or situational repository. It bundles its CSP offering with additional business-specific features aimed at its core markets, which makes direct value comparisons with CSP vendors more challenging.

**Kyocera Document Solutions**

Kyocera Document Solutions is a Niche Player in this Magic Quadrant. The vendor acquired Everteam software in March 2020, which now provides a major product within Kyocera’s CSP portfolio. The EverSuite CSP is mainly focused on information governance and archiving use cases. It provides a range of governance services for policy management, e-discovery and archiving, and also includes fully featured document and process management.

Operations are primarily in Europe and the Middle East. The vendor’s clients tend to be enterprises, with key verticals being government, manufacturing, finance, engineering and construction.

Kyocera Document Solutions now has a reasonably large CSP portfolio that also includes DACH region (Germany, Austria and Switzerland) vendors Ceyoniq Technology and OPTIMAL SYSTEMS, and DataBank, a reseller and service provider in North America. The majority of the research in this Magic Quadrant has focused on the Everteam products.

**Strengths**

- **Governance hub**: EverSuite incorporates a strong information governance feature set including retention management, records management and archiving. It is a good fit for organizations looking to consolidate unstructured data governance. Its federation services enable this governance to extend beyond the source repository to other CSPs and content repositories, such as network file shares.

- **Global expansion**: Kyocera’s acquisition of Everteam opens up the possibility of expansion into new markets via access to a broader channel. This will initially give clients in the Asia/Pacific region and Australia and New Zealand — where information governance is often a key purchasing driver — more options for governance-centric CSPs.

- **Customer experience**: Gartner Peer Insights data indicates that client feedback for EverSuite is generally very positive, with organizations routinely citing ease of deployment as a highlight.

**Cautions**

- **Limited workflow**
- **Pricing**
Laserfiche is a Challenger in this Magic Quadrant. Its CSP, also called Laserfiche, is available as self-hosted software or in the cloud as both multitenant SaaS or hosted by Laserfiche or its partners.

Its operations are predominantly in North America, with a smaller presence in the Asia/Pacific region and EMEA. Laserfiche has many clients in SMBs and a growing presence in midsize to enterprise customers, with key verticals being government, finance, healthcare, manufacturing and education.

Laserfiche has added vertical and horizontal capabilities to its core platform. Laserfiche Vault is a solution package that supports broker-dealer compliance with SEC Rule 17a-4. Smart Invoice Capture is a machine learning module that is built and trained to help automate invoice processing.

**Strengths**

- **Strong customer support:** Laserfiche offers best-in-industry support for clients in the government and education sectors in North America. It has hundreds of prebuilt applications on its platform and an extensive number of resellers and certified implementation partners with industry experience. There is also a strong peer community.

- **Solid information governance features:** Laserfiche has strong records management and governance capabilities supported by comprehensive metadata functionality. These governance services can be extended to external content repositories through its federation capabilities.

- **No-code process design:** Laserfiche provides a flexible process design tool that enables citizen developers to capture data from line-of-business applications and trigger processes within its CSP. New RPA and content application composition are accomplished with the help of a user-friendly visual workflow and form designer tools.

**Cautions**

- **Dependent on partners:** Most of the sales, service and support for Laserfiche are managed by its partners, although support for large customers is often handled by Laserfiche directly. Many
M-Files

M-Files is a Visionary in this Magic Quadrant. Its CSP, called M-Files Online, is available for on-premises or multitenant SaaS deployment.

M-Files focuses its CSP on the automation of business administration and business operation scenarios. It provides a broad range of content services, including federation and content intelligence.

Its operations are primarily in Europe, with strong client bases also in North America and Australia. Its clients tend to be SMBs with wide distribution across all verticals.

M-Files has focused on architecture improvements and integrations recently, with embedded UIs released for Salesforce and Microsoft Teams, Outlook and SharePoint.

Strengths

- **Federation leaders**: M-Files has one of the strongest approaches to federation in the CSP market. It is able to federate a large number of external repositories including SharePoint, file systems and long-standing CSP solutions like OpenText. Organizations looking to consolidate (but not necessarily immediately replace) large amounts of content in various repositories will value this approach.

- **Rich content intelligence**: M-Files has integrated AI into its content ingestion process to provide rich content intelligence capabilities. Metadata can be recommended or completely automated based on confidence thresholds. This enables organizations to remove the burden of metadata classification from end users, thereby driving adoption and enabling insight-driven applications to utilize good-quality metadata.

- **Content services applications**: M-Files provides a good range of solutions including productized content services applications for contracts, HR and quality control, and consulting offerings for accounts payable and legal. For organizations looking to implement these processes, it provides an optimal route to establish and get business value from a CSP implementation.

Cautions

- **Undifferentiated vision**: Laserfiche does not have clear differentiation in the marketplace. Its product development efforts are geared toward supporting use cases in government, healthcare, finance and education. This makes it a safe choice for highly regulated organizations, but also hampers its ability to expand into accounts with more aggressive strategic goals for content services.

- **No native Microsoft Teams integration**: Laserfiche does not have its own integration to Microsoft Teams for its multitenant SaaS solution. This is on the roadmap for 2021, but is currently dependent on a third-party partner for this connector.
Microsoft is a Leader in this Magic Quadrant. Its Microsoft 365 platform supports a broad range of use cases and is particularly strong in employee productivity. It provides standard content services capabilities and deep integration into the rest of the Microsoft ecosystem.

Its operations are globally distributed, and its clients are in all sectors and enterprise types.

Microsoft has enhanced the information governance capabilities in the Microsoft 365 platform, including a more cohesive records management package and autoclassification for sensitivity labels. Microsoft Search was also made available to enable a more comprehensive search experience. SharePoint Syntex, a document capture and classification framework, was released in October 2020.

**Strengths**

- **Productivity suite integration:** Microsoft 365 holds a commanding position in the marketplace for cloud office suites. Social media analysis reinforces this, with Microsoft as the vendor with the highest share of conversations in the CSP space. The content services provided by Microsoft, underpinned primarily by SharePoint, are tightly integrated into most aspects of the suite and are the default content repository. Gartner clients are increasingly evaluating Microsoft 365 as the foundational component of their content services strategies.

- **SaaS:** Microsoft 365 is a SaaS platform benefiting from the continuous development and update cycle this entails. It is a mature service with many options for data residency and additional privacy controls, such as customer-managed encryption keys.

- **Third-party partner ecosystem:** Microsoft has an extensive network of partners that provides solutions and services designed to enhance Microsoft 365. A dedicated Content Services Partner...
Program is in place and active. Many products, including integration adapters for Microsoft’s automation framework (Power Automate), can be added directly from the Microsoft app store, thereby empowering citizen developer activity.

**Cautions**

- **Third-party functional dependencies:** Microsoft customers often require third-party providers to achieve fully equivalent capabilities with other Leaders in this Magic Quadrant. The lack of high-volume capture capabilities and limitations in process automation often mean that organizations need to consider and evaluate add-ons for more traditional CSP use cases. These include accounts payable automation and employee file management.

- **Compliance-centric records management concerns:** Despite further investment, Microsoft still has several gaps in its records management capabilities. These can be a concern for organizations that have extensive compliance-centric records requirements. The inability to immediately destroy content and fully control content immutability are consistently highlighted as the biggest challenges. However, general simplicity in retention and records management often means that third-party add-ons are required in regulated organizations.

- **Architectural limits:** SharePoint imposes architectural sizing limits that are not present in other leading CSP platforms. The long-standing site-based topology of SharePoint, coupled with the limits associated with those sites, makes it more challenging to design complex, content-centric processes. This is particularly true when supporting high-volume transactional or archiving use cases requiring, for example, billions of documents. While not a hard limitation, it requires additional design consideration and workarounds, which can impact usability.

**NetDocuments**

NetDocuments is a Niche Player in this Magic Quadrant. It provides a modular, SaaS-based CSP that is focused on legal use cases and those where document production is the primary business deliverable (such as audit and consulting). It also provides a broad range of features across all content services capabilities except for bidirectional federation.

The vendor’s operations are primarily in North America and Europe. Most of its clients tend to be corporate legal teams within large enterprises, but there is also a presence in other areas such as financial services.

NetDocuments has enhanced the levels of content intelligence in its platform with the release of dynamic profile attributes, a feature that automates the collection of metadata.

**Strengths**

- **Email-centric collaboration:** With NetDocuments’ focus on the legal market, the primary UI for users is the email client. NetDocuments provides a tight integration strategy with Microsoft Outlook that includes predictive filing. This identifies where an email should be stored in the repository based on
where others in the organization have stored materials of similar content. Clients looking to support ad hoc authoring centered around Outlook will find this very important.

- **Attribute-driven geostorage**: NetDocuments takes an innovative approach to document storage by addressing it at the object level rather than the collection level. This enables content residency to be driven by its attributes rather than the folder in which it resides. Clients with stringent data residency concerns will value this flexibility.

- **Native SaaS platform**: NetDocuments is a true cloud-native multitenant SaaS. This provides benefits in terms of continuous improvement and decreased administration and implementation costs.

**Cautions**

- **Limited line-of-business integrations**: NetDocuments’ business application connectors are limited to Salesforce and specialist line-of-business applications used by legal teams. Clients looking for a foundational CSP that integrates with other business organizations could find that this negatively impacts adoption.

- **Workflow limitations**: NetDocuments provides very basic workflow capabilities. Organizations looking to deploy complex workflows or to support reports, notifications and task lists will need to use a third-party partner (for example, an integration with Microsoft Power Automate is available).

- **Legal-centric partner network**: NetDocuments’ primary focus on the legal community means that most of its partners are also focused on legal teams and use cases. NetDocuments’ own professional services team is very small compared to Leaders in this Magic Quadrant. Clients looking to deploy NetDocuments outside of legal use cases should rigorously qualify that they can obtain suitable implementation expertise for their functional and time scale requirements.

**Newgen**

Newgen is a Visionary in this Magic Quadrant. Its OmniDocs ECM suite is composed of a number of modules, including OmniDocs, iBPMS, Records Management System and Corrus. These cover content services, process services, records management and collaboration, respectively. OmniDocs is mainly focused on formal business administration (i.e., back office) and operational use cases (customer-centric business solutions), and provides a complete set of integrated services.

Its operations are primarily in the Asia/Pacific region, specifically India and the Middle East, with a small presence in North America. Its clients are both enterprises and SMBs, with key verticals being manufacturing, finance, government, insurance and healthcare.

Highlights for Newgen over the last year have been the revamp of its records management user experience and the further integration of content classification capabilities. Additionally, there are new integrations for Microsoft Office 365.

**Strengths**
Nuxeo

Nuxeo is a Visionary in this Magic Quadrant. The Nuxeo Content Services Platform, available in the cloud and on-premises, is focused on content-centric business processes covering operations and business administration. It provides a broad range of functionality across all content services capabilities.

Its operations are primarily in Europe and North America. While Nuxeo has a large base of SMB open-source clients, its focus and most of its customer base are enterprise customers with large volume and process requirements.

Nuxeo added its AI service, Nuxeo Insight, to the portfolio this year, which has enhanced the content intelligence capabilities of the platform. This gives organizations a way to configure and train machine
learning models with their own content and data.

**Strengths**

- **Large-scale repository support**: Nuxeo’s modern and flexible architecture — including NoSQL and distributed file system options — provides storage and content processing scalability to support organizations with billions of documents. Organizations in verticals with large-scale content processing or archiving requirements (such as media, financial services and insurance) will find this valuable.

- **Digital asset management (DAM)**: Nuxeo has a strong focus on DAM use cases, including an out-of-the-box brand management solution. This provides organizations with an option to cover both DAM and more traditional business-focused CSP use cases from a single platform.

- **Powerful application composition**: Nuxeo Studio combines an intuitive UI with a set of rich functionality for low-code development along with a REST-based API. This will enable organizations to empower citizen developers to compose simple applications while also providing capacity for more complex application development.

**Cautions**

- **Limited line-of-business integrations**: Except for Salesforce, Nuxeo relies on third-party partners to provide integrations with common business applications. Organizations looking to establish a foundational platform with a diverse application ecosystem that needs to be integrated will need to evaluate partner capabilities and commitment to their integrations.

- **Limited services delivery**: Nuxeo is a relatively small organization, and its professional services organization is smaller than the Leaders in this Magic Quadrant. The partner network is expanding, but is still smaller than major competitors, particularly among global system integrators. Prospective organizations will need to check the availability of implementation resources.

- **Limited global presence**: Nuxeo has a limited presence outside of Europe and North America. Clients in Latin America or the Asia/Pacific region might find it difficult to source relevant implementation and administration expertise.

**Objective**

Objective is a Niche Player in this Magic Quadrant. Objective’s CSP, Objective ECM, is focused on addressing formal, content-related processes, particularly where governance is an important requirement. It provides a broad range of functionality across all content services capabilities, including content, process, governance and federation.

Its operations are primarily in Australia and New Zealand, with a smaller presence in EMEA, the majority of which is in the U.K. Its largest customer base is in government at both the state and municipal levels.
Objective has further expanded its governance offerings with the July 2020 acquisition of Itree, a specialist provider of regulation technology for government clients.

**Strengths**

- **Complex records management**: One of Objective’s primary strengths is in records management, especially in the government market in Australia and New Zealand. It supports the complex retention policies required by the Australian government, which provides a good baseline for complex requirements in other jurisdictions. Organizations looking for government records management will find this a strong option.

- **Positive customer experience**: Objective had the highest Gartner Peer Insights scores for product capabilities and the ability to meet organizational needs. It was also in the top five for ease of experience and overall experience, indicating that users of the solution are generally happy with both the service and product.

- **In-place records management**: Objective is one of only a few vendors that are using federation to provide in-place records management. This allows organizations to manage retention policies inside Objective, but also to enforce those policies in other systems, such as Micro Focus TRIM, Microsoft SharePoint and OpenText Documentum.

**Cautions**

- **Narrow industry focus**: Most of Objective’s customers are in the government sector, with financial services a very distant second. This means that most of the solutions available out of the box are government-focused. Recent acquisitions have also been in the government sector. Gartner clients outside of the government sector should carefully evaluate how well-suited the platform is to their requirements.

- **Limited global presence**: Objective’s client base is mainly located in Australia and New Zealand, with a small presence in the U.K. Organizations considering Objective outside of these areas will need to carefully evaluate the availability of implementation resources to meet their requirements.

- **Cloud presence still emerging**: Objective still does not have a cloud presence that is equivalent to the Leaders in this Magic Quadrant. Objective ECM is only available either as an on-premises deployment or as an application managed service. Currently, only the collaboration module and collaborative authoring modules — CONNECT and KEYSTONE — are available as multitenant SaaS. Objective has plans to launch a multitenant SaaS offering of Objective ECM in November 2020. Clients looking for a pure SaaS solution for CSP requirements should carefully evaluate availability before adding Objective to their shortlists.

**OpenText**

OpenText is a Leader in this Magic Quadrant. Its Extended ECM Platform addresses most content services functional requirements, with Core for Federated Compliance addressing federation and the Magellan platform supporting content intelligence. OpenText is mainly focused on integrations with
leading business applications to automate processes and follow governance policies. The OpenText portfolio for content services also includes Documentum, which has an active roadmap and is positioned for specific use cases.

Its operations are international, with a key focus on North America, Europe, and Australia and New Zealand. Its customers tend to be enterprises, with key verticals being financial services, public sector, energy and utilities.

OpenText has added containerized deployment options to its content services offerings to allow organizations to deploy on-premises or in a public or private cloud infrastructure. It also provides a hosted managed service offering. OpenText continues to invest in multitenant SaaS capabilities to augment Extended ECM. This includes the Core family of services, including Core Share, Core Capture, Core Archive, Core Signature and Core for Federated Compliance.

**Strengths**

- **Global provider**: OpenText has a true global presence and a strong ecosystem of over 600 international partners to implement and support multinational clients. Its deep partnership with SAP (which resells Extended ECM and some of the Core services to its own customers) and its strategy of in-market acquisition have made it No. 1 in CSP market share.

- **Strategic content applications**: OpenText offers many vertical and horizontal content services applications. Examples include Vendor Invoice Management for SAP Solutions, Contract Center for contract life cycle management and Extended ECM for SAP SuccessFactors for HR document management.

- **New work nucleus vision**: OpenText’s product vision is that the Extended ECM platform provides augmented workflow and governance capabilities for content, while bringing additional context to that content. For example, Extended ECM can integrate with Microsoft Office 365 to access and centrally govern customer content within the Microsoft Teams environment.

**Cautions**

- **Customer experience**: OpenText is the subject of more inquiries from Gartner clients about license audits than any other CSP vendor. Clients also express frustration when it comes to negotiating with OpenText sales. This applies to new and existing contracts and renewals (including maintenance renewals and product upgrades).

- **Varied content intelligence effectiveness**: OpenText has been advertising the content intelligence capabilities of Magellan for several years. Like other content intelligence tools on the market, Magellan makes aggressive claims that can vary in effectiveness based on industry, use case and quality of data. Application leaders should work with OpenText to identify reference clients for Magellan and to set up POCs to test the tool against their specific use cases.

- **Complex implementations**: Content services projects are complex, but Gartner clients regularly cite OpenText for adding additional difficulty. This is partly due to the extensive range of functional
SER Group

SER Group is a Visionary in this Magic Quadrant. Its Doxis4 iECM suite is focused on supporting formal content services processes in business administration and operations. It provides a consolidated platform covering all core and optional content services with an add-on — Doxis4 iRoom — specifically targeted at external collaboration.

Its operations are primarily in Europe, with North America and the Asia/Pacific region being growing markets. Its clients tend to be enterprises with a spread across most verticals, the largest being insurance, financial services and manufacturing.

SER Group has revitalized its user experience with a complete redesign of its web-based Ul's. It has also expanded the already rich machine learning capabilities with additional semantic analysis and improved text mining.

**Strengths**

- **User experience:** The Doxis4 user experience has been improved greatly by SER Group in the latest release. In last year's Magic Quadrant, this was highlighted as a caution; however, the vendor has addressed this with a well-designed, intuitive user experience that is now a strength of the suite.

- **Deployment flexibility:** SER Group offers a range of deployment options including software, application managed service, private SaaS and multitenant SaaS, with feature parity between these offerings. This increases the appeal of the platform for clients with specific deployment requirements.

- **Embedded intelligence:** SER Group has embedded intelligent services powered by machine learning algorithms throughout the platform. They offer content classification at various stages of the content life cycle and a powerful training UI, decreasing the reliance on data science experts for machine learning configuration.

**Cautions**

- **Complexity:** Gartner receives consistent feedback that Doxis4 can be complex to deploy and configure. Implementation cycles are, on average, longer than the Leaders in this Magic Quadrant, although this could be due to the complexity of the processes for which the SER Group is selected. The main design tool, the Doxis4 cubeDesigner, while detailed and deep in functionality, is a complex application.

- **Geographical presence:** SER Group remains strongest in the European market, particularly in the DACH region. It rarely appears on shortlist Gartner reviews outside of that territory. There is limited
investment in the U.S. market, but there is a need to accelerate its expansion strategy in order to keep pace with the Leaders included in this research.

- **Federation limitations**: The federation capability of the vendor’s platform is limited to search and archiving only. This was extended in 2019 to allow external structured data sources to be searched. Clients must, however, migrate their content to Doxis4 in order to derive the full benefits from its features.

**Vendors Added and Dropped**

We review and adjust our inclusion criteria for Magic Quadrants as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant may change over time. A vendor's appearance in a Magic Quadrant one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. It may be a reflection of a change in the market and, therefore, changed evaluation criteria, or of a change of focus by that vendor.

**Added**

Axway has been included for the first time in this Magic Quadrant as it expanded its capabilities from its content collaboration heritage to more formal business operations.

**Dropped**

Micro Focus’ focus on governance functionality did not meet the inclusion criteria for products to be suitable as a foundational CSP in an organization.

**Inclusion and Exclusion Criteria**

The CSP market is extensive, with many vendors offering solutions across geographies, industries and organization sizes. This Magic Quadrant assesses only those vendors that have broad international and functionality applicability, and are suitable for enterprise clients. This is aligned with the market definition, which states that a CSP can be used as a foundational platform and is, therefore, suitable for many different use cases. In order to qualify, vendors must satisfy a minimum set of market presence and functional criteria.

**Market Presence Criteria**

Vendors must satisfy the following criteria as indicators of their international market presence:

- **Offering**: Vendor has a generally available CSP offering for enterprises that is being actively marketed to new clients and must be available as a separately billed, stand-alone product. The product must be generally available before 1 May 2020.

- **Revenue**: Vendor must have at least $20 million in total revenue derived from CSP sales in 2019 or have a demonstrated revenue growth rate of 40% from 2018 to 2019 and at least $10 million in total
revenue from CSP sales in 2019. Total CSP revenue includes the revenue that is generated by sales of CSP software/services, maintenance and support services.

- **Total users:** There must be at least 200,000 active, paid users among all the organizations that are licensed to use the content-services-related product.

- **Installed base:** The current installed base as of 1 April 2018 must meet the following criteria:
  - The total number of customer organizations with paid for, active, content-services-related deployments must be higher than 500.
  - There must be at least 50 deployments that have over 500 seats.

- **Geography:** Vendor must have an active presence in at least three major regions. Major regions are defined as:
  - North America
  - Europe
  - Middle East and Africa
  - Asia/Pacific
  - Latin America

- **International commitment:** The vendor’s main CSP product offering must include an internationalization framework for the user experience that allows it to be presented in different languages. The product must also be available in at least three different languages.

- **Presence as a foundational platform:** The market definition describes CSPs as “the foundational component in an organization for the management and utilization of content.” Therefore, the vendor must confirm that its product is applicable to a broad range of use cases. For the purposes of this Magic Quadrant, that is defined as:
  - At least 20% of the vendor’s CSP customer deployments must be in a secondary area of business activity. A business activity is a common topic area and can be a combination of corporate and vertical activity (for example, support for corporate HR and recruitment industry companies, or engineering departments and engineering organizations, is all counted as a single business activity).

### Functional Criteria

Vendors must satisfy that their product contains at least the minimum feature set described below for each of the core capabilities identified in the CSP market definition:
Content repository:

- Large-scale content repository capable of storing tens of millions of content objects and related metadata in a single customer instance
- Ability to store all content types, regardless of format

Document and content management library services:

- Ability to upload content and create new content from scratch within the platform
- Native document management capabilities that allow users to work directly on content stored in the platform, with facilities to check content in/out and create new versions
- Ability to track and maintain version history
- Provision of templates for the creation of new content

Records management:

- Ability to create and manage retention policies that define how long content is retained when it gets to a certain state
- Ability to automate deletion of content when it exceeds its defined retention period
- Ability to lock content and metadata, making it immutable when it has reached a given state
- Ability to automate the application of retention policies based on classification, location or metadata state

Process automation:

- Provision of out-of-the-box workflows for content routing and approval
- The ability for authorized users to define (without the need to write code) workflows that automate document routing and the assignment of tasks
- The provision of a task management component to identify and take action on tasks assigned to individual users or groups

Open APIs:

- A REST-based API, available for consumption by customers, that provides access to the majority (more than 70%) of core product features

Security and privacy controls:
Ability to apply and maintain granular levels of security, including create read, update, delete and download

Metadata:
- Ability to define and apply metadata models for specific content types
- Ability to define different types of metadata, including text, numeric, date and boolean data
- Ability to apply ad hoc metadata tags to content
- Ability to enforce different controls on metadata completion, including look-ups from predefined lists and making certain metadata mandatory

Search:
- Ability for end users to perform a full text search for text that might occur anywhere within content stored in the system
- Ability for end users to perform a metadata search

Collaboration:
- Ability to synchronize content with a local device for accessing remotely and while offline
- Ability to share content with internal and external recipients from the UI

Enterprise administration:
- A unified administration console that allows administrators to manage users, groups, roles, and general system performance and capability parameters
- Ability to integrate with enterprise directory information services for user/group/role/security management (must include general LDAP and Active Directory support)
- Support for single sign-on (SSO)

Reporting:
- Ability to define and run reports that describe system usage

Mobility:
- A mobile client available on both iOS and Android platforms that provides access to basic document management capabilities
Honorable Mentions

- **Egnyte.** Egnyte represents the growing trend for vendors that have previously offered content collaboration broadening to address more operational and administrative use cases. Egnyte has done so by combining its cloud content collaboration service with its cloud content security, compliance and governance product into an all-in-one platform. The vendor narrowly missed out on inclusion in this year’s research as it failed to meet the inclusion criteria for workflow functionality. This is an item on Egnyte’s roadmap for 2020.

- **AISHU.** AISHU is another vendor that has a collaboration heritage and is now able to satisfy more formal use cases. It is primarily active in the Chinese market and, as such, did not meet the inclusion criteria for geographical presence.

- **ASG.** ASG’s investment and rejuvenation of the Mobius platform means it is moving beyond its archiving heritage and is now viable for more operational use cases. However, it is still primarily governance-focused and did not meet the functional inclusion criteria for productivity and collaboration by the 1 May 2020 cutoff date.

- **Intalio.** Intalio has spun out of the Everteam group, of which Kyocera acquired the software division. Intalio was primarily focused on professional services when operating in the Everteam group, but is now focused on providing its own solutions to the market. The vendor did not meet the inclusion criteria for geographical presence.

- **Macrowing.** Macrowing is also primarily active in the Chinese market. It has a strong CSP offering with modules covering document management, governance, low-code application composition and an insight engine. It did not meet the inclusion criteria for geographical presence.

Evaluation Criteria

Gartner analysts evaluate technology providers on many factors. These include the quality and efficacy of the processes, systems and methods that enable performance to be competitive, efficient and effective. Ultimately, technology providers are judged on their ability to capitalize on their vision and their success in doing so.

Ability to Execute

We analyze the vendor’s capabilities across broad business functions. Ability to Execute reflects the market conditions and our analysis and interpretation of what we hear from the market. Gartner analysts evaluate each vendor on the quality and efficacy of the processes, systems, methods or procedures that enable them to be competitive, efficient and effective, and to positively impact revenue, retention and reputation within Gartner’s view of the market.
Table 1: Ability to Execute Evaluation Criteria

<table>
<thead>
<tr>
<th>Evaluation Criteria</th>
<th>Weighting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product or Service</td>
<td>High</td>
</tr>
<tr>
<td>Overall Viability</td>
<td>High</td>
</tr>
<tr>
<td>Sales Execution/Pricing</td>
<td>Medium</td>
</tr>
<tr>
<td>Market Responsiveness/Record</td>
<td>High</td>
</tr>
<tr>
<td>Marketing Execution</td>
<td>Medium</td>
</tr>
<tr>
<td>Customer Experience</td>
<td>High</td>
</tr>
<tr>
<td>Operations</td>
<td>Medium</td>
</tr>
</tbody>
</table>

Source: Gartner (November 2020)

Completeness of Vision

Completeness of Vision distills a vendor’s view of the future, the direction of the market and the vendor’s role in shaping that market. We expect the vendor’s vision to be compatible with our view of the market’s evolution. A vendor’s vision on the demands for a foundational CSP within an ever-evolving technology landscape is particularly important. The rating for Completeness of Vision is based on direct vendor interactions and our analysis of the vendor’s view of and preparedness for the future.
Table 2: Completeness of Vision Evaluation Criteria

<table>
<thead>
<tr>
<th>Evaluation Criteria</th>
<th>Weighting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Market Understanding</td>
<td>High</td>
</tr>
<tr>
<td>Marketing Strategy</td>
<td>Low</td>
</tr>
<tr>
<td>Sales Strategy</td>
<td>Low</td>
</tr>
<tr>
<td>Offering (Product) Strategy</td>
<td>High</td>
</tr>
<tr>
<td>Business Model</td>
<td>Medium</td>
</tr>
<tr>
<td>Vertical/Industry Strategy</td>
<td>Medium</td>
</tr>
<tr>
<td>Innovation</td>
<td>High</td>
</tr>
<tr>
<td>Geographic Strategy</td>
<td>Medium</td>
</tr>
</tbody>
</table>

Source: Gartner (November 2020)

Quadrant Descriptions

Leaders

Leaders in this market articulate the positioning and vision as a foundational content service vision and a distribution and implementation ecosystem that can fulfill it. They have significant global market presence, strong partner relationships, consistent financial growth, broad platform applicability and international, well-regarded customer support. The product suites offered by these vendors will address all of the core and optional capabilities of a CSP. They will also exhibit strong differentiation in the Critical Capabilities (as described in Critical Capabilities for Content Services Platforms). Leaders have broad applicability across many CSP use cases and the ability to support global implementations. Potential customers should, however, note that a Leader is not always the best choice. A smaller, more focused vendor could potentially provide excellent support and commitment for individual needs.

Challengers

Challengers have a level of product capability broadly equivalent to Leaders. There may even be cases where a Challenger offers greater depth in terms of one or more standard capability. Challengers also
have significant distribution channels and market presence. However, the vision of Challengers is not as well-matched to Gartner’s assessment of a CSP as the foundational component in an organization’s content service. This is apparent in areas of innovation where they have been slower to progress than Leaders. These gaps are often apparent in the Critical Capabilities, such as lack of integrations to the new work nucleus or less integrated intelligence services. Additionally, Challengers may lack presence in certain industries or geographies, and may be unable to differentiate their offerings as clearly as Leaders. Despite shortcomings in terms of vision, Challengers are usually a good choice for large, horizontal enterprise initiatives. They should be assessed alongside Leaders for such initiatives.

Visionaries

Visionaries, like Leaders, present modern, innovative and often highly differentiated offerings. The way they implement Critical Capabilities is often highly differentiated (for example, rich federation solutions or intelligent services tightly and consistently integrated into end-user activities). They typically have broad applicability across several industries and geographies. However, they often exhibit limitations in terms of scale, which constrains their Ability to Execute. They are generally smaller organizations than Leaders and Challengers, with distribution channels, market shares and partner networks that are more limited. Visionaries are suitable for organizations looking to modernize and transform. They can tackle familiar problems in new ways. Prospective customers should, however, check whether these vendors can scale their services to meet the demands of large international projects with broad horizontal use-case requirements.

Niche Players

Niche Players have limitations in terms of both Ability to Execute and Completeness of Vision in comparison with Leaders. This makes them more suited to niche projects, such as industry-specific and departmental deployments. Niche Players characteristically focus on a specific segment. Examples include the size of market (such as the small and midsize enterprise market), industry segment (such as the legal sector), geography (such as EMEA) or capability (such as information governance). Niche Players can also have a large geographical presence and strong set of capabilities, but the strategic importance to the vendor may be waning. This often materializes in losing market share and they are, therefore, considered less frequently on procurement shortlists. The CSP market is extensive, with many small and localized vendors. For inclusion in the Magic Quadrant. Niche Players must indicate significant market presence that elevates them above other vendors not included in the research. Organizations looking to implement solutions in the niches served by these vendors should shortlist them. A Niche Player could potentially provide better capability for a given use case than a more general vendor categorized as a Leader.

Context

Buyers of CSP technology now have many options that can enable them to truly implement an enterprise vision of content services. Advances in federation, intelligence, cloud deployment and user experience mean that the market provides a more modernizing set of capabilities than ever before. New content services have never been easier to procure, deploy and implement. In many cases, they are now also
composable services, with rich-design-oriented UIs allowing users to compose applications from the underlying microservices.

However, application leaders looking to procure new content services should recognize that CSPs are rarely implemented as “greenfield,” stand-alone implementations. There is usually some existing technology in place. This may be seen as legacy by the organization, but it is always worth assessing the upgrade options of existing platforms. Migration and replatforming costs can be substantial. Likewise, the business application ecosystem (such as ERP and CRM systems) that the CSP needs to integrate with can be a huge differentiator. The degree to which an application can be seamlessly integrated will have a big impact on adoption.

This Magic Quadrant represents a snapshot of the current CSP market and year-over-year comparisons should be avoided. It will assist you in selecting a foundational CSP, but do not use it as your only aid. You should also consult the companion Critical Capabilities for Content Services Platforms, which will help you identify product differentiation and use-case alignment in this mature market.

Your final selection criteria must reflect your organization’s functional and technical requirements and business objectives. Do not, for example, select a Leader or reject a Niche Player simply on the basis of such categorization. Assess any vendor that meets your “must have” requirements — a vendor in any one of the four quadrants could be the best choice for your needs.

**Market Overview**

The content services market is made up of many vendors that have serviced this market for a very long time. As such, it can often be seen as legacy technology and differentiation can be hard to find. However, there have been some significant developments in recent years that caused considerable movement in the market:

- **Changing client expectations and demand**: These have shifted considerably over the last couple of years. Client demand has moved well beyond the traditional domain of imaging and governance. Organizations have invested heavily in this type of technology over the last few decades and have often been disappointed by the results. As such, organizations often demand simplicity and ease of adoption, and are often prepared to compromise in terms of richer governance and functional services. This has led to vendors that have had a more collaboration-focused outlook to make deep inroads into CSP market share.

- **Move to the cloud**: Organizations are moving CSP services to the cloud. This has been accelerated by the response to the COVID-19 crisis. The need to implement and maintain content flow (the provision of content to employees as and when they need it) requires cloud-based services. Some of the more long-standing vendors have been late to the game in positioning a complete SaaS/PaaS content services offering. This is now having an impact on their organic growth and market share. In addition, cloud office (and in particular Microsoft 365) is now the dominant productivity interface and, therefore, all content services must integrate seamlessly with it. Social media conversations also
highlighted the growing popularity of cloud-ready CSPs, especially in 2020, when flexible rapid deployment and ease of access is especially important to drive digital resilience.

- **Viable, useful and integrated intelligent services**: Intelligent services, primarily those powered by machine learning, have really made a large impact on vendor offerings in this space in 2019 and 2020. Gartner has seen three major types of intelligence maturing significantly in content services offerings over the last 12 months: Content intelligence: the classification of content; productivity intelligence: improving employee productivity by surfacing relevant content and proactively based on employee behavior; and security intelligence: the automated protection of content in different contexts and scenarios.

"Artificial Intelligence" has been a much overused buzzword for some time; however, there is now evidence of a consistent set of useful features across these areas. Vendors that have tightly integrated such services into the overall experience provide a compelling choice for a modern CSP.

Consolidation is also occurring in the content services market. This market went through a raft of consolidation in recent years and Gartner expects more activity in the next 12 to 18 months. The recent Hyland-Alfresco acquisition demonstrates that large vendors, even with very different strategies and offerings, can come together. In a market that is increasingly commodified and where the Microsoft 365 offering is commonly a default consideration, broader product portfolios provide greater options for differentiation.

Evidence

- **SMA Usage Guidelines: Analysis**

- **Approved Methodology**: Gartner conducted social listening analysis leveraging third-party data tools to complement or supplement the other fact bases presented in this Magic Quadrant. Due to its qualitative and organic nature, the results should not be used separately from the rest of this research. No conclusions should be drawn from this data alone. Social media data in reference is from 1 July 2017 through 30 June 2020 in all geographies and recognized languages. However, it is important to note that the data for China is largely nonrepresentative due to the restrictions that it places on foreign-owned social media platforms.

- **Sources Covered**: By default, social media sources considered for analysis include Twitter, Facebook (publicly available information only), aggregator websites, blogs, news, mainstream media, forums and videos (comments only), unless and until specified.

- **The SMA Team**: Vidita Menon and Ayush Saxena from the Social Media Analytics Team contributed to this research.

- **Gartner Peer Insights for the Content Services Market**

- **2020 CSP Magic Quadrant Vendor Survey**
Note 1: Emergence From the ECM and Document Management Markets

CSPs supersede the markets of ECM and document management. CSPs focus on integrations with line-of-business applications and coexist as foundation platforms, as per the market definition. The focus of ECM was primarily on being a single monolithic repository, and integrations to other UIs and line-of-business applications could be limited. As such, ECM and document management applications tended to be a destination for end users, rather than something that was embedded more seamlessly into common business-centric user experiences.

Evaluation Criteria Definitions

Ability to Execute

Product/Service: Core goods and services offered by the vendor for the defined market. This includes current product/service capabilities, quality, feature sets, skills and so on, whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.

Overall Viability: Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood that the individual business unit will continue investing in the product, will continue offering the product and will advance the state of the art within the organization's portfolio of products.

Sales Execution/Pricing: The vendor's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support, and the overall effectiveness of the sales channel.

Market Responsiveness/Record: Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the vendor's history of responsiveness.

Marketing Execution: The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This "mind share" can be driven by a combination of publicity, promotional initiatives, thought leadership, word of mouth and sales activities.

Customer Experience: Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways customers receive technical support or account support. This can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups, service-level agreements and so on.

Operations: The ability of the organization to meet its goals and commitments. Factors include the quality of the organizational structure, including skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis.
Completeness of Vision

Market Understanding: Ability of the vendor to understand buyers’ wants and needs and to translate those into products and services. Vendors that show the highest degree of vision listen to and understand buyers’ wants and needs, and can shape or enhance those with their added vision.

Marketing Strategy: A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the website, advertising, customer programs and positioning statements.

Sales Strategy: The strategy for selling products that uses the appropriate network of direct and indirect sales, marketing, service, and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base.

Offering (Product) Strategy: The vendor’s approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature sets as they map to current and future requirements.

Business Model: The soundness and logic of the vendor’s underlying business proposition.

Vertical/Industry Strategy: The vendor’s strategy to direct resources, skills and offerings to meet the specific needs of individual market segments, including vertical markets.

Innovation: Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes.

Geographic Strategy: The vendor’s strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries as appropriate for that geography and market.

Document Revision History

Magic Quadrant for Content Services Platforms - 30 October 2019
Magic Quadrant for Content Services Platforms - 25 October 2018
Magic Quadrant for Content Services Platforms - 5 October 2017
Magic Quadrant for Enterprise Content Management - 31 October 2016
Magic Quadrant for Enterprise Content Management - 21 October 2015
Magic Quadrant for Enterprise Content Management - 25 September 2014
Magic Quadrant for Enterprise Content Management - 23 September 2013
Magic Quadrant for Enterprise Content Management - 18 October 2012
Magic Quadrant for Enterprise Content Management - 13 October 2011
Recommended by the Authors

How Markets and Vendors Are Evaluated in Gartner Magic Quadrants

Critical Capabilities for Content Services Platforms

Reinventing ECM: Introducing Content Services Platforms and Applications

Market Guide for Content Collaboration Tools

Office 365 Requires a Content Services Coexistence Strategy to Support Digital Business

Control Content Sprawl With Federations

Can AWS or Azure Be Your Next Content Services Platform?

Market Share Analysis: Content Services, Worldwide, 2019