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Magic Quadrant for Content Services Platforms

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Organizations are increasingly looking to consolidate their content services portfolio using cloud-based services that are simple to deploy, configure and operate. Vendors are responding with increasing SaaS capabilities. Application leaders should use this report to select the right CSP for their content services strategy.

Market Definition/Description

Gartner defines content services platforms (CSPs) as the foundational component in an organization for the management and use of content. CSPs provide a way for employees to retrieve and work with content in a modern, seamless way across devices and organizational boundaries. As such, they are a core component of any organization's digital workplace strategy.

Content services platforms have been most traditionally used to satisfy operational, business-centric requirements. They are integrated into other business applications to ease access, and consolidate governance and content protection capabilities. In Gartner's digital workplace framework model (see Architect the Future of Work With the Digital Workplace Framework), this is described as integration into business role hubs.

However, as organizations seek to consolidate content and document management systems, they are also used for more collaborative, ad hoc, content-centric requirements. In the digital workplace framework, this is described as integration into the "new work hub." This ability to support both formal business requirements and more ad hoc, collaborative, team-based working is what makes a CSP such a foundational component.

The core capabilities of a CSP include:

- Content repository

- Document and content management library services

- Records management

- Process automation and application development

- Open APIs

- Security and privacy intelligence

- Metadata

- Search

- Enterprise administration

- Reporting

- Mobility

- Content collaboration

The optional capabilities of a CSP include:

- Content intelligence

- Productivity intelligence

- New work hub connectors

- Business role hub connectors

- Federation

- PaaS/SaaS deployment

A full description of each of these services is present in the accompanying Critical Capabilities for Content Services Platform.

The content services market is well established with many vendors having had products in this space for over 30 years. As such, many of the core capabilities have become commodity features with little differentiation. Newer entrants to the market have, however, taken a different approach to some of these areas. As such the critical capabilities — those capabilities that are highly differentiated and of most importance to evaluate when selecting a product in this space — are a blend of core and optional capabilities.

These critical capabilities are:

- Records management

- Process automation and app development

- Security and privacy intelligence

- Content intelligence

- Productivity intelligence

- New work hub connectors

- Business role hub connectors

- Federation

- Content collaboration

- PaaS/SaaS deployment

Of these critical functions, it is the last — PaaS/SaaS deployment — which has seen the greatest growth in importance over the last few years. Organizations are looking increasingly to modern, cloud-based solutions. Content services has been a traditionalist technology discipline for many organizations with on-premises or private hosted solutions being the most commonly deployed model. This is changing rapidly with a majority of Gartner inquiries now focusing on cloud deployments to modern existing implementations. This increased importance of true cloud solutions is reflected in our market analysis this year.

Magic Quadrant

Figure 1: Magic Quadrant for Content Services Platforms

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Vendor Strengths and Cautions

AODocs

AODocs is a Niche Player in this Magic Quadrant. Its CSP, also called AODocs, is built on top of Google Drive and is a multitenant SaaS platform. It provides a full set of CSP capabilities.

AODocs' 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 has made further inroads into the enterprise market in 2021, increasing the proportion of large organizations utilizing the service among its client base. AODocs is extending its platform to offer services on top of Google cloud storage, thereby providing an alternative storage method to customers who cannot or do not want to use Google Drive.

Strengths
- **Google Workspace:** AODocs has established itself as a primary consideration for organizations focused on Google Workspace as their new work hub. It is deeply embedded into the Google ecosystem and is therefore able to make extensive use of adjacent capabilities such as Google collaboration and AI.

- **SaaS:** AODocs is a cloud-native platform with a true multitenant SaaS solution in a market that still lags in this respect. This makes it good for organizations looking to benefit from the evergreen nature of cloud services and outsourcing of operational concerns. A private cloud, single-tenant version of the services is also available.

- **Growing business solution portfolio:** AODocs increased its portfolio of business-specific applications in 2021, adding solutions for contract management and invoices to its existing life sciences application. Organizations looking to deploy readymade business solutions with minimal configuration will value this.

Cautions
- **Google dependency:** AODocs is currently dependent on Google Drive for its underlying file repository services, which provide content editing capabilities and enable it to be used as a CSP. It is adding support for native Google storage in the near future, as well as support for non-Google identity services. Organizations that do not wish to use Google services should watch for this upcoming version of AODocs.

- **Organization size:** AODocs meets the inclusion criteria for this Magic Quadrant, but is the smallest vendor in terms of revenue, number of employees and partner ecosystems. This presents a risk to large organizations looking to make significant investments in the platform, which should be quantified as part of their evaluation of AODocs.

- **Integration limitations**: AODocs has a more limited set of integration capabilities with enterprise business applications than other major competitors in this Magic Quadrant. For example, it has no integration with SAP or Oracle ERP Cloud, and only limited Microsoft 365 integration. AODocs incorporates Tray.io to provide configurable connectivity to such systems, but this is more limited than competitor offerings.

Box

Box is a Leader in this Magic Quadrant. The Box Content Cloud platform is a SaaS and is focused on collaborative employee- and business-centric content needs. It provides CSP capabilities in its Enterprise Plus edition, which bundles a range of features previously sold individually. The majority of Box customers use the platform as a secure content collaboration tool. However, to support CSP use cases, Box clients need Box Governance, Box Relay and Box Shield.

Box's operations are primarily in North America, with growing presence in Europe and Asia. It has over 100,000 clients, from SMBs to large enterprises, in key verticals like financial services, life sciences and the public sector.

In 2021, Box announced an expanded relationship with Microsoft and Google Cloud, along with closer integration with Microsoft 365 and Google Workspace. Box acquired SignRequest in 2021, upon which the new Box Sign service is based, along with Cloud FastPath, upon which the new Box Shuttle content migration service is based.

Strengths
- **Cloud content services at scale**: Box has scaled its user base and content repositories, so that it is viable for business-centric content use cases that require large document sets, governance, security and process automation. While some core capabilities hold Box back, the signs are that it is closing the gap and continues to be a viable alternative to traditional vendors in this market.

- **Small- to large-scale customers**: Box's customer base includes organizations and departments of all sizes and industries, for whom Box may be their first taste of sophisticated content management tools. This large customer base bodes well for Box's ability to grow and upsell to both new and existing customers.

- **Ease of use**: Attracting and onboarding over 5,000 new customers each year is testament to the ease of use and adoption rates for Box. Box's ease of use and integration with business roles and new work hub connectors like Salesforce, SAP, Microsoft 365 and Google Workspace allow Box to play a broad role in enterprise applications delivered securely in the cloud.

Cautions
- **Pricing model and bundling**: Box is encouraging customers to adopt new bundles, including Enterprise Plus, which may lead to increases in subscription fees. In addition, API pricing is highly variable and appears expensive for high-volume, customer-centric content use cases based on the proposals Gartner has seen. Clients renewing subscriptions, as Box moves from

core Box with upgrades options to Enterprise Plus, should carefully evaluate their transactional API needs to ensure good value.

- **Geofencing**: Data residency in the Box Zones module is 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. Slower growth in some markets may reflect concern over Box's data residency strategy and ability to meet strict regulatory requirements. Box's SaaS solution may not suit clients that have concerns about data residency in the cloud.

- **Capability maturity:** Box continues to lag in several key CSP capabilities, including granular records management, granular access control, forms and workflow.

DocuWare

DocuWare is a Niche Player in this Magic Quadrant. It focuses its CSP on tackling and automating business administration scenarios. It provides all core CSP capabilities as either on-premises or SaaS deployments.

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

DocuWare continues to operate as an autonomous business unit within Ricoh, its parent company. Recent DocuWare investments have included improving integrations with Microsoft 365 and the development of cloud-based business solutions for the Japanese market.

Strengths
- **Easy to manage and deploy:** DocuWare provides several mature capabilities — including administration, workflow design, forms creation and records management planning — in a centralized, simple toolset. This centralized toolset is particularly valuable for organizations with limited IT capacity, and is a key differentiator for organizations that struggle with the administrative complexity of Microsoft 365.

- **SaaS maturity:** DocuWare has a long-standing SaaS platform that has full feature parity with the on-premises solution, so customers can deploy either without sacrificing capabilities.

- **Global experience and support:** DocuWare is now owned by Ricoh and, as such, has access to Ricoh's worldwide service organization. It can provide clients and channel partners with service and support regardless of geography.

Cautions
- **Differentiation from new work hub suites**: Clients could find it difficult to justify expenditure on DocuWare when tools like Microsoft 365 or Google Workspace are already present in the business, especially where Microsoft's workflow and records management are fulfilling client needs. Budget pressure on SMBs will continue to pressure them to consolidate content management capabilities in 2022.

- **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.

- **Limited integrations**: DocuWare trails the market in integrating with new work hubs and business role hubs. Notably, DocuWare has no integration with Microsoft Teams. This was a common capability in most of its competitors in 2020. DocuWare has plans to release this integration in 2022. DocuWare provides integration tools for clients to configure and develop their own business application integrations.

d.velop

d.velop is a Visionary in this Magic Quadrant. Its d.velop documents solution is mainly focused on the midsize enterprise market (MSE) in Germany, Austria and Switzerland (DACH). It provides a foundational core of content services features.

Founded in 1992, d.velop's operations are primarily in DACH, with some presence in Asia/Pacific and North America. Its clients tend to be in the retail or logistics industries.

d.velop has been primarily focused on core functionality such as collaborative authoring, external file sharing and electronic signatures for its SaaS-based platform, which is built on Elasticsearch and Amazon S3.

Strengths

- **Complete solution for MSE**: d.velop offers a complete set of foundational content services, integration options and solutions (contracts and invoices) in a package that is compelling to MSEs. This includes appropriate pricing and a SaaS-based solution that is easy to deploy with minimal IT resources.

- **Strong SaaS architecture**: d.velop's SaaS architecture is built on microservices that use Amazon S3 and Elasticsearch, and has the potential to scale significantly. d.velop's cloud platform is less than two years old and still experiencing early-stage adoption. Clients should closely review case studies and references as they evaluate the product.

- **Apps market distribution**: d.velop has taken a unique approach to market expansion by distributing its d.velop documents platform in various vendor app stores (Microsoft AppSource and Salesforce AppExchange). Organizations looking to purchase d.velop's platform may find this a compelling and simple means of procurement.

Cautions

- **Limited large enterprise capabilities**: d.velop documents provides only a fundamental set of functionality for traditional content services. Outside of SAP and Salesforce, many of its integrations into business applications are traditionally targeted at MSEs. This can be limiting to larger organizations with more mature content services' needs.

- **Minimal international presence**: d.velop's presence outside Germany and the other DACH countries is limited. Its partner ecosystem is primarily European. While its North American presence is driven by various vendor app stores, end-user clients rarely mention d.velop in shortlists reviewed by Gartner. Organizations outside the DACH region should be aware of these limitations.

- **Limited information governance**: d.velop lacks a formal records management capability that is comparable to Leaders in this market. Basic retention and disposition controls are available. However, organizations looking for fully featured records management capabilities such as file plan management will need to integrate other solutions.

Fabasoft

Fabasoft is a Niche Player in this Magic Quadrant. The company's content services platform, Fabasoft Business Process Cloud, is focused on cloud-based document and business process management needs. It includes Mindbreeze as an insight engine. Fabasoft is available as a multitenant SaaS, on-premises or as an application managed service.

Fabasoft's primary market is Europe, with limited presence in North America and Asia. It has over 650 clients, with those in the government, finance and manufacturing sectors representing 75% of all its customers.

Fabasoft has expanded its portfolio with investments outside of the content services platform market. In 2019, it acquired a majority stake in Xpublisher, which is an XML editing and publishing solution. In 2021 Fabasoft continued to increase its stake in enterprise search vendor Mindbreeze.

Strengths
- **Low-code deployment**: Fabasoft is focused on model-driven, low-code deployment of content and business process services. Customers seeking business-driven modeling and forms design should evaluate Fabasoft for this need.

- **Government solutions**: Fabasoft has a strong reputation in e-government content services in Germany in particular. National and regional government bodies in German-speaking countries should consider Fabasoft as a solution.

- **Cloud deployment**: Fabasoft has several deployment models offering customers everything from on-premises to multitenant SaaS deployment. Customers requiring European-hosted SaaS solutions should consider Fabasoft.

Cautions
- **Limited geographical presence**: Fabasoft is focused on the European market, and we note that there are few staff members in the key North American market. Customers outside of Europe should be cautious about Fabasoft's capabilities outside of its home markets and its over-

reliance on a German-centric delivery team. Gartner did not receive any Fabasoft-related inquiry from North America in the period covered by this report.

- **Limited integration strategy:** Fabasoft has a limited set of out-of-the-box connectivity for leading business applications. It lacks integrations for Salesforce, Microsoft Dynamics and Oracle ERP Cloud, that are common among leaders in this market. Fabasoft provides open APIs to allow customers to build their own solutions. Clients looking to implement Fabasoft as a common foundational platform in their organization should evaluate the total lifetime cost of building and maintaining such integrations as part of their evaluation.

- **Productivity intelligence:** Fabasoft scored below average for productivity intelligence, lacking introductory features such as recommendations. Customers should be cautious of choosing Fabasoft if productivity intelligence is a key requirement.

Hyland

Hyland is a Leader in this Magic Quadrant. It currently markets three products — OnBase, Alfresco and Nuxeo — as CSPs. Hyland's product portfolio addresses all of the content services functional requirements. OnBase is focused on the midmarket and enterprise space. Alfresco is mainly focused on large repositories and records management. Nuxeo supports large repositories and digital asset management. Alfresco and Nuxeo are open-source platforms.

Hyland's operations are global and it now has customers on all major continents. Hyland has a strong focus in healthcare, education, financial services, insurance and government, while supporting both enterprise buyers from an IT developer and line-of-business perspective with different products in the portfolio.

Hyland followed up its 2020 acquisition of Alfresco with the acquisition of Nuxeo in April 2021. This vendor spent the first six months of 2021 devising a strategy for its newly expanded portfolio, on which it is now executing.

Strengths
- **Low-code application build:** Hyland's OnBase is a strong low-code platform with a robust workflow engine and configuration experience. This enables clients to build applications that combine document-centric capabilities such as document comparison and workflow-centric capabilities such as load balancing and delegation.

- **Large-volume repositories:** Hyland's Alfresco and Nuxeo platforms have proven themselves with benchmarks and customer case studies to scale to support billions of documents. These are well-suited to large global organizations or those with long retention requirements for records.

- **Repository federation:** Hyland's Alfresco and Nuxeo platforms provide strong federation capabilities, providing access to content in other repositories as if in their own repository. This is most evident in Alfresco's in-place records management, which allows organizations to leave content in other repositories but manage them as a record from within Alfresco.

Cautions

- **Pricing model**: OnBase's pricing is complex and varies by industry. Proposals often contain many line items, making them difficult to understand and compare. While Hyland has made efforts to improve this complexity since 2020, most proposals Gartner sees are more complex than competitors in this market.

- **Hosted rather than SaaS**: The OnBase SaaS option is a single-tenant hosted service. Gartner hears challenges from clients when working with OnBase in a SaaS/hosted model and integrating with on-premises applications. This is a consequence of hosting a solution that is not designed for the cloud in the way that some leading competitors are. Hyland has acquired cloud-native CSP options that are available to clients and that is helping it accelerate the development of a new SaaS platform.

- **Platform overlap**: Hyland has acquired two major content services solutions in the last 12 months to add to an already large content services portfolio. While Hyland is actively marketing OnBase, Alfresco and Nuxeo as CSPs, there is significant overlap between these and, in particular, Alfresco and Nuxeo in terms of both capabilities and target clients. Clients should therefore carefully evaluate the long-term roadmap of whichever Hyland solution they are evaluating. Gartner has heard increasing reports of Perceptive customers (a previously acquired Hyland product) being asked to move to alternative Hyland products.

IBM

IBM is a Niche Player in this Magic Quadrant. Its IBM Cloud Pak for Business Automation is focused on business automation and information governance use cases. Underpinning the content services capabilities are IBM FileNet Content Manager (for document management), IBM Enterprise Records (records management), IBM Business Automation Workflow (process automation), IBM Business Automation Insights (reporting), IBM Business Automation Document Processing (content intelligence to support content services use cases) and IBM Datacap (intelligent document capture).

IBM's primary CSP markets are the Americas and EMEA, followed by APAC. It has over 10,000 customers (including those that use its business automation products), with key vertical markets being banking, insurance, government, telco and retail.

Recent IBM product releases include integrations with Microsoft Teams, AI-powered document classification and data extraction, and platform changes to containerization, APIs and database engine support.

Strengths

- **Platform scaling**: IBM content service platforms have been tested with high-volume content seen only in the largest enterprise accounts. Customers can utilize, but are not limited by, a full IBM technology stack, including infrastructure, database and content services platforms. Customers considering scaling to billions of objects in a single repository should consider IBM FileNet and Content Manager OnDemand.

- **Artificial intelligence and machine learning**: Sophisticated AI and ML tools for content classification, data extraction and image recognition based on IBM Watson demonstrate some leadership in this field. Customers should consider IBM's ML, particularly for image recognition and classification.

- **Global customer base and support organization**: IBM focuses on high-quality after-sales service for large enterprise customers, which is reflected in its high proportion of revenue from maintenance support and consulting services that are focused on meeting business needs.

Cautions

- **Declining market share:** Gartner estimates that IBM's CSP revenue declined in 2020 for the second year running resulting in a continuing decrease in CSP market share. Gartner highlights a comparatively low number of new customer wins. In Gartner inquiries, IBM FileNet is the most common source for migrations to other platforms. Pricing and total cost of ownership are most commonly mentioned as the rationale for looking at alternative platforms.

- **CSP market responsiveness**: IBM is failing to meet market needs for the kind of content collaboration and multitenant SaaS deployment models that are driving customer demand. The vendor has prioritized automation over content collaboration and this has impacted its presence in the CSP market. Additionally, failure to adapt to multitenant SaaS and instead focusing on hybrid deployments has meant IBM has failed to capitalize on demand for simpler deployment, implementation and support models

- **Investment in products**: Based on IBM earning statements, Gartner estimates maintenance, support and professional services to represent a significant proportion of IBM's revenue in this segment. Despite high gross margins in this segment, IBM has failed to invest significantly in the content services portfolio to support new content-centric markets and opportunities. New investments have been weighted toward AI-powered automation.

iManage

iManage is a Niche Player in this Magic Quadrant. iManage focuses its CSP, named iManage Work, on business areas where case work and formal document production are primary use cases. This is most common in legal, but also includes accounting, professional services and financial services.

The majority of the vendor's operations are in North America and Europe, though it also has a presence in Asia/Pacific and Latin America. The majority of its implementations are less than 1,000 users due an industry and role-specific focus (particularly legal). This installed base is across a range of SMB and enterprise clients.

iManage has focused on bringing to market a fully cloud-based SaaS version of iManage Work and extending its partnership with Microsoft in 2021.

Strengths

- **Outcome-driven case work:** Driven by its core strength in legal case work, iManage provides a strong solution for any outcome-driven, case-based work across industries and business functions. This includes predefined information structures for case work, along with functions that support it, including deliverable tracking and tight integration with email.

- **Policy-driven security:** iManage includes a very flexible and powerful mechanism for defining label-based security. This is not common in the CSP market and allows organizations to define complex, policy-driven security rules. This is useful for business functions that have "need to know" or "ethical walls" security requirements.

- **Native SaaS availability:** iManage has launched a SaaS version of its iManage Work in 2021, although it has had versions of the product available in the cloud since 2017. This enables clients to take advantage of an evergreen platform that is continually updated and modernized.

Cautions

- **Limited process automation:** iManage has very limited workflow and process automation compared with other competitors in this market. The iManage Business Intake Manager provides some capability in this respect, but it is related to a specific use case.

- **Nascent SaaS offering:** While iManage has now released a SaaS version of iManage Work, this is new to the market with limited client case studies. Gartner has heard reports from early adopters that there are stability and functionality challenges with the SaaS platform that need to be ironed out. Complementary iManage products such as iManage Extract and Insight (formerly RAVN) and Business Intake Manager are not yet available as SaaS offerings, but are on a roadmap for release toward the end of 2021. Prospective clients should carefully evaluate references from other cloud clients and consider a hybrid strategy for managing multiple iManage products.

- **Pricing:** The vendor's pricing for large enterprises is high compared with competitors in the CSP market, primarily due to the bundling of other business-specific features. The costs are more comparable at lower user counts (for example, at fewer than 100 users), where other vendor discounts are minimal.

Intalio

Intalio is a Visionary in this Magic Quadrant. Intalio was originally the professional services organization within the Everteam group, which was broken up in 2020 (the software components of which were sold to Kyocera). Its CSP, also called Intalio, provides a full set of CSP capabilities.

Intalio's operations are primarily in the Middle East, but it also has a presence in Europe (mainly France), Africa and a small presence in North America. Intalio is focused on enterprise clients, with the biggest industries being government and education.

In 2021, Intalio worked on establishing brand recognition as an independent vendor and has also focused on expanding its portfolio of business solutions.

Strengths

- **Business solutions**: Driven by its heritage as a professional services organization delivering client solutions, Intalio has a broad set of specific business solutions that enable clients to more quickly realize business benefits. Examples include correspondence management, case management and site inspections.

- **AI focus**: Intalio has successfully embedded AI capabilities within its CSP product, providing a rich range of cognitive services that enable content recognition and classification. It aligns these services well with its business solutions to provide usable solutions for its target industries.

- **Middle East focus**: Intalio has a strong offering for clients based in the Middle East. It has an impressive set of references in most countries across the region.

Cautions

- **Geographic presence**: Intalio's presence outside of France and the Middle East is limited compared with Leaders in this market. Intalio has a geographic expansion plan for 2022. However, clients in North America, other European countries and Asia/Pacific should closely scrutinize local references to ensure there is sufficient implementation and operational expertise to support their objectives.

- **Company size**: In its current form, Intalio is a relatively new and small organization in comparison to other major competitors in this market. It has an established track record as part of the Everteam group, but its status as a smaller, independent vendor outside of that presents some risks for organizations looking to make substantial investments in its technology and services.

- **No SaaS capability**: Intalio does not have a multitenant SaaS version of its primary products, Intalio Document and Intalio Case. There are private cloud and hosted versions of the platform available from Intalio. However, clients looking for a cloud-native, evergreen platform will find these services more complex to manage and operate.

Kyocera Document Solutions

Kyocera Document Solutions is a Niche Player in this Magic Quadrant. Kyocera now has a reasonably large CSP portfolio driven through acquisition. This includes yuuvis and enaio (from its acquisition of OPTIMAL SYSTEMS), EverSuite (from its acquisition of Everteam) and nScale (from its acquisition of Ceyoniq Technology), along with a range of homegrown components. The analysis in this report primarily focuses on yuuvis and Eversuite.

Kyocera's operations in the CSP market 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.

In 2021, Kyocera has been refining the strategy for its complex CSP portfolio, with yuuvis appearing to become the vendor's lead offering.

Strengths

- **DACH region:** The vendor has a strong presence in the DACH region, primarily with yuuvis, which offers a relatively complete set of CSP capabilities.

- **Sales channel:** Kyocera has an extensive sales channel to target due to the overall group's strength in other related markets and the extensive nature of its portfolio. Customers buying other Kyocera products (such as multifunction devices) that are also looking to select CSP technology should evaluate these offerings.

- **Archiving:** The vendor has a proven track record in providing governance-rich, large-scale and long-term archiving solutions with the EverSuite solution. Its federation and search capabilities provide clients with an option of migration over time, thereby enabling quicker and less disruptive realization of business benefits.

Cautions

- **Disjointed vision:** Kyocera's vision for its portfolio of products remains disjointed and complex nearly one-and-a-half years after its last major acquisition in this space. Product capabilities for the individual products are reasonable. However, this disjointed vision presents a risk to potential clients looking to invest in a technology that may take a different strategic direction when the overall vision becomes more solid.

- **Limited international presence:** The CSP products within the Kyocera portfolio that have the largest market share (yuuvis and Eversuite) are primarily deployed by clients in Europe. Presence in other markets, particularly North America and Asia/Pacific, is very limited compared with competitors in this market.

- **Limited Microsoft integrations:** Integrations with Microsoft 365, the most common productivity platform, are limited compared with Leaders in this market. There are integrations with the web-based Office clients, but integration with Microsoft Teams is particularly limited compared to leaders in this market.

Laserfiche

Laserfiche is a Visionary in this Magic Quadrant. The Laserfiche content services platform is focused on content-centric process automation needs. It includes content services, multichannel capture, information governance, records management, intelligent process automation, collaboration and business application integrations, all bundled into Starter, Professional and Business suites. Laserfiche is available in either SaaS, on-premises or hybrid deployment modes.

Laserfiche's operations are primarily in North America, with a smaller presence in Europe, Latin America and Asia/Pacific. Channels are a key feature of its go-to-market strategy, with over 85% of sales going through them. It has over 9,000 clients, mostly small to midsize organizations with

a growing presence in large enterprise customers. Nearly half of all its customers are in national/local government and financial services.

Laserfiche has continued to roll out its hybrid architecture and SaaS services. It has expanded Microsoft 365, Teams and Outlook integrations.

Strengths

- **Business process toolset in the cloud**: Laserfiche has a comprehensive and well-integrated set of business process automation technologies, including business process design, workflow, forms and reporting/dashboarding. Gartner rated the cloud nature and configurability of these capabilities highly, and they represent some of the best cloud process automation and application development tools we have seen. Clients seeking best-in-class, content-centric business automation should consider Laserfiche.

- **Strong channel model:** With over 85% of its revenue coming through resellers and partners, channels are a very successful part of Laserfiche's go-to-market strategy. The channel strategy gives customers the assurance that they can work with local partners for implementation and delivery, while benefiting from Laserfiche's corporate scale. Partners benefit from the knowledge that they have a relationship with a vendor committed to a channel strategy, one that can justify the partner's investments in the product and go-to-market activities.

- **Cloud and hybrid architecture**: With SaaS, hybrid and on-premises offerings and solutions for synchronizing between each, Laserfiche can offer clients every possible deployment option. This allows new customers to immediately take advantage of SaaS deployment while offering an onramp to the cloud for existing customers that have on-premises solutions.

Cautions

- **Revenue slowdown**: Gartner estimated revenue shrinkage in 2020 for Laserfiche, which is anomalous in relation to growth seen in the market as a whole. Laserfiche has transitioned to focusing on SaaS subscriptions instead of perpetual licensing, which may be impacting revenue in the near term. Clients should be cautious of further revenue declines should this result in changes to the current product investment strategy.

- **Limited international presence**: Revenue outside of North America remains low and there is limited direct presence globally to support resellers and partners. Customers should be cautious in their choice of implementation and delivery partner in international markets and assess the relationship with the vendor.

- **Weak marketing and brand recognition**: Prospective customers should be cautious about Laserfiche's ability to grow and invest in its products due to relatively weak marketing and brand recognition compared with competitors.

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, notably federation and content intelligence.

Its operations are primarily in Europe, with a strong client base in North America and a growing client base in Australia and New Zealand. Its clients tend to be MSEs with wide distribution across all verticals.

M-Files acquired Hubshare in 2021 with the intent to improve the experience of external file sharing and collaboration.

Strengths

- **External file-sharing experience**: M-Files' acquisition, and the integration of Hubshare, enables a feature-rich and user-friendly third-party file sharing capability. M-Files has combined this with a historical strength in federation to enable a secure, user-friendly approach to sharing content from any source without compromising security.

- **Automated metadata augmentation**: M-Files has integrated AI into its platform to recommend or completely automate the metadata classification for a document based on machine learning and confidence thresholds. This enables organizations to improve search and records management effectiveness by automating metadata augmentation with limited human intervention.

- **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

- **Complex user experience**: The M-Files user experience is powerful but is still often described as complex for relatively casual users. M-Files has been working on updating its UI, and, while the latest review showed limited incremental improvements to the web interface, additional updates are on the roadmap. Gartner has received some feedback that the navigation experience is overly complex for simple use cases. The newly acquired Hubshare capability is a notable exception.

- **Professional services coverage**: M-Files is a midsize organization compared with Leaders in this Magic Quadrant and has a small professional services team and a partner ecosystem. However, North America is a strategic focus for M-Files, and its staff and partner ecosystem are growing. Prospective client organizations should vet implementation and integration resources from M-Files and partners with equal scrutiny.

- **Emerging large enterprise applicability:** M-Files primarily serves the MSE market or as a departmental solution in large enterprise environments. M-Files has around 100 deployments of over 1,000 users, which is lower than Leaders in this Magic Quadrant. In addition, the architecture is not designed for large, high-volume archive-driven use cases. Enterprise clients looking to implement a solution that are large, enterprise scale or that cover both archived and active content should review and validate the size of their content repositories with M-Files.

Microsoft

Microsoft is a Leader in this Magic Quadrant. Its Microsoft 365 E5 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.

Microsoft's operations are globally distributed, and its clients are in all sectors and enterprise types.

Over the past year, Microsoft has focused efforts on rolling out SharePoint Syntex, a document capture and classification framework, and Viva Topics, an entity identification and knowledge management capability.

Strengths

- **Productivity suite integration:** 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 for Microsoft 365.

- **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:** It is easy to find implementation and training resources given Microsoft's extensive network of partners. Those partners provide solutions and services that are designed to enhance Microsoft 365. A dedicated Microsoft 365 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

- **Limited content capture:** SharePoint Syntex provides basic content capture capabilities that are more similar to a modern "desktop scanning" service than the advanced capture capabilities of Microsoft's competitors, which are built to support large and complex content capture and processing needs for an enterprise.

- **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 show-stopping limitation, it requires additional design consideration, which can impact usability.

- **Content sprawl:** Clients regularly tell Gartner that Microsoft 365 facilitates content sprawl in their organizations. Microsoft ecosystem partners have recognized this challenge as well. There is a growing number of tools available from third-party vendors (at additional cost) to help administrators manage the life cycle of SharePoint sites and Teams channels.

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 either law firms or corporate legal teams within large enterprises, but there is also a presence in other areas such as financial services.

NetDocuments has focused its product on improving findability and collaboration on documents across its own repository, Microsoft 365, and other enterprise document storage locations.

Strengths
- **Innovative integration strategy with new work hub:** NetDocuments has moved beyond standard integration with Microsoft Office 365. It has developed a coexistence strategy to expand on its strength in Outlook integration to building flows between Office 365 and NetDocuments using Power Automate and advanced annotation capabilities for tools that are stored and managed in the NetDocuments repository.

- **Expanded email-centric collaboration:** NetDocuments classic strength in email collaboration has been extended now to allow IT to centrally adopt and distribute ndMail capabilities to all Outlook and Gmail users without an additional app or download. ndMail provides a tight integration with email providers 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 email will find this very important.

- **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' built-in business application connectors are limited to Microsoft Power Automate and Salesforce connectors; however multiple third-

party integrations are available. Clients looking for a foundational CSP that integrates with other business organizations could find that this approach lacks the depth they need to support all business processes.

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

- **Limited professional services and 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 with 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 Contextual Content Services platform is composed of a number of modules including an intelligent business process management suite (iBPMS) and records management.

The vendor's operations are primarily in APAC, the Middle East and Africa, however, its revenue is growing in North America. Newgen focuses on enterprise clients, with the majority of these in the financial services industry. Other significant industries are government, healthcare and insurance.

Newgen has been working on enhancing AI capabilities, such as predictive metadata and content recommendations.

Strengths
- **Advanced integrated workflow capabilities:** Newgen's iBPMS provides advanced features to interact with third-party individuals and platforms. Know your customer (KYC) functionality includes document identification and video recording capabilities that can be used to validate individuals. Meanwhile, a bot can be trained to retrieve data from third-party applications within workflow. Organizations looking to support external workflows may find these useful.

- **Document assembly:** Newgen's cloud office capabilities include the ability to create new documents using templates, prebuilt clauses and properties of the document. Organizations looking to support the drafting of common documents, such as contracts, offer letters and proposals, may find these automation features valuable.

- **Strong records management:** Newgen's platform provides a rich set of records management capabilities, including compliance with DoD 5015.2, VERS, NRAA, ISO 15489, and ISO 16175. This will be of interest to organizations with strong compliance or information governance needs.

Cautions

- **Geographic presence**: Newgen's global presence is primarily based in APAC, the Middle East and Africa. Newgen saw revenue growth in North America but still rarely appears on shortlists there. Prospective clients in North America and Europe need to evaluate Newgen and its partner local delivery and support capabilities.

- **Complex deployments**: Gartner clients report challenges with their large-scale deployments of the Newgen platform, primarily regarding complexities in deploying technical architecture. Additionally, low-code capabilities are more targeted toward the developer community rather than empowered business users, which also increases implementation time. Organizations looking to deploy and customize the platform should validate their implementation plan closely with their implementation partners.

- **Innovation Completeness**: Clients Gartner has had reports from clients that some of the solutions and offerings that are new to Newgen's portfolio are not always delivered as fully packaged products. These offerings, often using newer AI/ML services to deliver business-specific solutions are not always available as fully developed, consumable services. Organizations should closely evaluate the availability of any advanced services proposed with relevant case studies and references.

Objective

Objective is a Niche Player in this Magic Quadrant. Objective is focused on markets where information governance and records management are a priority. Products include Objective ECM (content services platform), Objective Inform (information governance) and Objective GOV365 (Microsoft SharePoint governance).

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 national and regional levels.

Objective expanded its governance offerings with the July 2020 acquisition of Itree, a specialist provider of regulation technology for government clients. In 2020, there were key product releases for GOV365, RegWorks and Trapeze, but the Objective Nexus SaaS Platform release was delayed until 4Q21.

Strengths

- **Information governance and records management**: Objective Inform demonstrates a particularly strong governance and records management feature set, which meets complex requirements for records managers who need to comply with local regulations.

- **Integration with Microsoft Office 365**: Objective demonstrates strong support for both file sharing and collaboration via Microsoft Teams, with federation and records-in-place support for Microsoft SharePoint use cases. Objective governance capabilities for Microsoft Teams includes support for records management of conversational content.

■ **Focus on public sector:** Objective's focus on national and local government markets means that clients in these areas are well served by a vendor that understands its market needs and reflects this in strategic product capabilities.

Cautions

■ **Limited global presence:** Objective remains focused on clients in Australia, New Zealand and the U.K. Clients outside of these core markets should be cautious about Objective's focus and experience in their markets.

■ **Multitenant SaaS solutions:** While Objective plans to expand its range of SaaS solutions to include the core platform, it remains behind competitors that have strong existing SaaS offerings and that are market tested. Multitenant SaaS remains key to capturing market share and delivering services at global scale. Clients looking for multitenant SaaS should be cautious about the availability and readiness of Objective's solutions. Clients should evaluate Objective's Nexus platform when it becomes available.

■ **Narrow industry vision:** The narrow focus on government by Objective marketing and sales limits the vendor's ability to compete more broadly and grow outside of core markets. Clients outside of government should be cautious about Objective's understanding and ability to support their markets.

OpenText

OpenText is a Leader in this Magic Quadrant. Its Content Cloud platform is made up of a range of products including Extended ECM, Core Content and Documentum, which provide a complete set of content services capabilities. OpenText is mainly focused on integrations with leading business applications to automate processes and follow governance policies.

OpenText's customer base is international, with a key focus on North America, Europe, Australia and New Zealand. Its customers tend to be large enterprises, with key verticals being financial services, public sector, energy and utilities.

In 2021, OpenText added Core Content, a multitenant PaaS/SaaS offering to its portfolio.

Strengths

■ **Global presence:** 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 OpenText No. 1 in terms of CSP market share.

■ **Integration-centric approach:** OpenText provides a very strong set of capabilities for integration into leading enterprise line-of-business applications. These include Microsoft Dynamics, Salesforce, SAP and SAP SuccessFactors. Additionally, OpenText has a well-designed and recently modernized integration for Microsoft Teams, available in Extended ECM.

- **Expanding cloud options**: OpenText now has a true multitenant SaaS CSP in Core Content. This is new to the market in 2021 and customers should evaluate that the current set of features meet their needs. It is, however, evidence of OpenText's expanding and evolving cloud vision.

Cautions

- **Customer experience**: OpenText customers often express frustration about price negotiation, and unexpected project complexity. OpenText is also the subject of more inquiries from Gartner clients about license audits than any other CSP vendor.

- **Overlapping portfolio**: OpenText has the largest portfolio of content services offerings in the CSP market due to a growth aided by acquisition strategy. However, much of this is overlapping and integrations between the various services are not consistent. This can be confusing for potential clients who should closely validate that the products they are considering are well integrated and are long-term strategic investments for OpenText.

- **Unsuitability for MSEs**: OpenText's primary CSP offerings are not well-suited to MSEs. The architectural complexities, license costs and extensive feature set associated with these products are typically not well-aligned to MSE requirements. OpenText's expanding cloud platforms may start to mitigate this, but these are nascent market offerings.

SER Group

SER Group is a Visionary in this Magic Quadrant. Its Doxis4 iECM (on-premises) and Doxis4 Cloud iECM (SaaS) suites support both traditional task-based business processes and case-based business processes, by providing predictive email filing and strong workflow capabilities.

SER Group's operations are primarily in Europe with a presence in North America and Asia/Pacific driven by local subsidiaries of their European clients. Its clients tend to be midsize to large European companies in the insurance, finance or manufacturing verticals.

SER Group has expanded its cloud offering and added AI capabilities to its suites. But growth outside of Europe is still limited.

Strengths

- **Business role hub connectors**: SER Group provides a broad set of business role hub connectors using its Doxis4 SmartBridge service. It offers out-of-the-box connectors to Infor, Microsoft Dynamics 365, Oracle, Salesforce, SAP and Workday. An API is provided that allows customers to develop their own integrations.

- **Workflow and case-based work**: SER Group supports predictive email filing, which is a feature often seen only in case-based work. Predictive filing nudges the users to where an email should be stored in the repository, rather than making the user navigate a folder hierarchy. Its Asana-based workflow supports more common task-based work.

- **Federation capabilities**: SER Group continues to promote and support federation capabilities, although these are currently limited to enterprise search functionality. A significant number of

organizations are looking to address content from multiple content services silos from a single platform. This sprawl is only becoming more complex as organizations add content services applications to their content services portfolios.

Cautions

- **Geographic presence:** SER Group is rarely mentioned by clients outside Europe. Its most strategic partners are also primarily focused in Europe and there is no presence among global system integrators. There has been some investment in building a North American presence, but Gartner has not seen any indication of an uplift in appearance on vendor shortlists in this geography.

- **Cloud limitations:** SER Group's multitenant cloud platform is currently only deployed to MSEs or for departmental implementations. Large enterprise cloud implementations (for example, 5,000 users) are typically private cloud application managed services rather than multitenant SaaS. SER claim the ability to support large enterprise in their multitenant cloud. However this capability requires custom-made pricing and Gartner has seen no customer references to date. Large enterprise clients should carefully evaluate and benchmark SER solutions deployed in this way.

- **Complexity:** Gartner continues to receive feedback that Doxis4 can be complex to deploy and configure. Implementation cycles are sometimes longer than we see from other vendors, especially as we see a move to low-code/no-code solutions. The main design tool, the Doxis4 cubeDesigner, while detailed and deep in functionality, is a complex yet comprehensive application made for administrators rather than business experts.

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

- Fabasoft has been added to this Magic Quadrant this year. It last qualified for inclusion in 2018, but failed to meet geographical inclusion criteria in subsequent reports.

- d.velop and Intalio have qualified for this Magic Quadrant for the first time this year. They have been included as honorable mentions in previous reports.

Dropped

- Axway is no longer targeting its sales or marketing efforts for Syncplicity at the content services platform market. As such, it fails to meet the inclusion criteria for this analysis.

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 enterprise 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 May 1, 2021.

- **Revenue:** Vendor must have at least $20 million in total revenue derived from CSP sales in 2020 OR have a demonstrated revenue growth rate of 25% from 2019 to 2020 AND at least $10 million in total revenue from CSP sales in 2020.

- **Total users:** As of 1 May 2021, 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 May 2021 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. Active presence is defined as having at least 10% of revenue billable in a single region outside of the primary territory, and a further 5% of revenue billable in a third territory.

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).

- **PaaS/SaaS offering:** The vendor must have a SaaS/PaaS version of the product available with at least 1,000 active monthly users on the PaaS/SaaS platform as of 1 May 2021. The Gartner definition of SaaS and PaaS are included below. However please note that for the purposes of this market evaluation, services that are private instances hosted in a tailored fashion specifically for an individual client should not be included in this count.

  - [Definition of SaaS](#)

  - [Definition of Platform as a Service (PaaS)](#)

- **Market traction:** The vendor must have sold and implemented its CSP product (that meets the functional inclusion criteria below) to at least 10 new (net new clients to the vendor) clients in the period between May 2020 and May 2021.

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

- **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

    - Ability to provide synchronous or asynchronous comments on the content

- 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

- **AISHU:** AISHU is a CSP vendor with a collaboration heritage. It provides solutions that embed artificial intelligence and also include local code development capabilities. It is primarily active in the Chinese market and, as such, did not meet the inclusion criteria for geographical presence.

- **Macrowing Software Technology:** 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.

- **KnowledgeLake:** KnowledgeLake is a U.S.-based vendor that has, historically, provided information capture services for the Microsoft platform. However, it has recently expanded its offering to provide a CSP of its own, focused on transactional use cases and based on the Microsoft Azure stack. KnowledgeLake did not meet the inclusion criteria for geographical presence.

- **Siav:** Siav has a significant presence in the Italian market with a complete set of CSP-related functionality. It has recently developed a new SaaS version of its offering to meet increasing demand for such services. Siav 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

Evaluation Criteria ↓	Weighting ↓
Product or Service	High
Overall Viability	High
Sales Execution/Pricing	Medium
Market Responsiveness/Record	High
Marketing Execution	Medium
Customer Experience	High
Operations	Medium

Source: Gartner (October 2021)

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

Evaluation Criteria ↓	Weighting ↓
Market Understanding	High
Marketing Strategy	Low
Sales Strategy	Low
Offering (Product) Strategy	High
Business Model	Medium
Vertical/Industry Strategy	Medium
Innovation	High
Geographic Strategy	Medium

Source: Gartner (October 2021)

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. As a group, Leaders are considered part of most new purchase proposals and have high success rates in winning new business. 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, geography or business function specific 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 platform market is a mature market with many vendors that have serviced this market for over 30 years. As such change is gradual and not revolutionary. Over the past 18 to 24 months there has been a number of key trends that have taken place:

- **Slow market growth:** The overall growth of the content services market (including content collaboration tools) slowed in 2020 as organizations responded to COVID-19-related issues.

However the content services platform market was the hardest hit, with negative growth of 1.7% (see Market Share Analysis: Content Services, Worldwide, 2020). Content services platforms are often significant investments, and are focused on broad digital business transformation, which was not a high priority during the immediate responses to the pandemic.

- **Vendor consolidation**: There has been considerable consolidation and acquisition in the content services platform market, which started during 2019 and continued into 2020 and beyond. This has been partly driven by slowing market growth and the need for large vendors to continue to grow even if by acquisition. It has also been driven by a need for vendors to modernize and acquire technology innovations, particularly in cloud and artificial intelligence domains. There are now multiple vendors that own extensive and overlapping content portfolios, which limits customer choice and makes selection of the right product more difficult for clients.

- **Move to the cloud**: Client demand is increasingly focused on simpler procurement, deployment, operations and access to innovations. Typically, this means SaaS/PaaS solutions and this is the predominant request that Gartner sees in vendor shortlists. This is evident in the market growth. Vendors with native SaaS solutions are growing fastest. Long-standing vendors in this market have been slow to provide a viable, fully featured SaaS/PaaS solution, but 2020 has seen significant development among that community of vendors.

- **Embedded intelligence**: Artificial Intelligence is critical to content services. In the past, this has often been an interesting feature looking for a use case. However it is becoming increasingly embedded within real business solutions from correspondence management to case management. Gartner tracks three categories of intelligence within its Critical Capabilities analysis: productivity intelligence, content intelligence and security intelligence.

Evidence

- Gartner inquiry related to content services vendors and strategy

- 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 enterprise content management (ECM) and document management (DM). 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 DM 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.

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