Gartner.

Magic Quadrant for Content Services Platforms

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The evolving product landscape for content services platforms creates new opportunities for digital business transformation. Using this research, application leaders can assess vendors' ability to deliver content services that will enable their organization's content strategy.

Market Definition/Description

Gartner's market definition and functionality for content services platforms have been updated for 2018.

The content services platform market is one of a series of content-related technology markets that Gartner studies as part of its content services research.

Gartner defines content services platforms (CSPs) as: A set of services and microservices, embodied as an integrated product suite and applications that share common APIs and repositories, to exploit diverse content types and to serve multiple constituencies and numerous use cases across an organization.

CSPs are integrated platforms that provide content-focused services, repositories, APIs, solutions and business processing tools to support digital business and transformation. Typical CSP use cases include document management, back-office processes, business process applications, records management and team productivity. A CSP has its own repository. CSP services and data may also integrate with external, non-native repositories and applications through prebuilt connectors, API development or prepackaged integrations. CSPs have web, desktop and mobile app interfaces that let users navigate through and work with the different content services. The platforms may also offer prebuilt solutions for vertical and horizontal content processes such as

case management, legal matter management, contract management and many more. CSPs are available on-premises, as hosted services, in the cloud (SaaS and/or PaaS) or in hybrid architectures that combine cloud and on-premises storage and/or services.

CSPs support all content types and formats throughout the content life cycle; they enable the following:

■ **Capture and ingestion of content in digitized file formats** — Including scanning and optical character recognition (OCR), migration, automatic content generation or user-generated files.

■ **Management and retention of digitized content files and associated metadata** — Declaring and managing systems of record, information governance, content life cycle and metadata management.

■ **Business processing of digital content** — Workflow development and creation, integration with enterprise systems and data, line-of-business (LOB) process and purpose-focused applications.

■ **User productivity working with digital content** — Through effective access and navigation, search and retrieval, or interfaces to content files.

■ **Platform services for digital content** — Integrated content-related services, microservices (see Note 1 for a definition) and repositories, with support for integration with external applications, services and repositories through connectors or customized interfaces using APIs.

■ **Administration of digital content and platforms** — Through administrative tools, dashboards or visualization to support the operation and management of the CSP.

(For a more complete listing of CSP functions and capabilities, see Note 2.)

For 2018, we have updated the representative vendors' inclusion criteria and evaluation criteria for this Magic Quadrant. There are significant differences this year with respect to the financial and functional capabilities and the profile of the vendors.

Magic Quadrant

Figure 1. Magic Quadrant for Content Services Platforms

Source: Gartner (October 2018)

Vendor Strengths and Cautions

Alfresco

Alfresco (https://www.alfresco.com/) , is privately held, founded in 2005, and based in Maidenhead, U.K. and San Mateo, California, U.S., with offices in Atlanta, Georgia U.S., Australia, France and Germany. The Alfresco Digital Business Platform, based on open-source standards, includes Alfresco Content Services, Alfresco Process Services (Activiti-powered BPM), Alfresco Governance Services (automated records management), Search and Insight Engine (contextual analytics), and Desktop Sync (file sync and sharing). Deployment options are on-premises, private cloud (Amazon Web Services [AWS], Microsoft Azure, Google Cloud Platform), virtualized deployment technologies (Docker and Kubernetes), and hybrid environments. Customers can also buy managed hosted services through Alfresco partners. Alfresco is the only CSP with a "Quick Start" button for deploying to AWS. The platform also provides publicly available APIs, support for

"open standards," and prebuilt connectors for integration with enterprise and business applications. Its Application Development Framework (ADF) has low-code, reusable user interface components to quickly build custom user experiences (including augmented reality/virtual reality) and integrations. Vertical industry specializations include financial services, government, insurance, manufacturing and healthcare.

Alfresco is a good fit for cloud-first customers looking to reduce operational overheads and build more robust content-processing applications.

Strengths

■ Alfresco's CSP vision focuses on an accelerated return on investment: by minimizing deployment time and application building effort through easy cloud deployment, intelligence and application building, respectively, via its AWS Quick Start, Search and Insight Engine and ADF components.

■ Alfresco reported its strongest overall growth rate in 2017, far above the CSP market growth average. This growth is an indication of a robust channel and partner ecosystem available to customers.

■ Alfresco's reference customers scored its ease of implementation and the ample availability of support highly, especially with partners that are invested in Alfresco.

Cautions

■ Alfresco's Content Services in the Cloud SaaS offering will be discontinued in 2019. Customers looking for a holistic cloud-based CSP need to leverage one of Alfresco's technical partners for private or managed hosted cloud services.

■ To match the full capabilities of rival CSP offerings, Alfresco customers must incur additional complexity and costs to round out the basic platform. Separate modules are needed for advanced analytics, insight and reporting, as well as intelligent capture and ingestion services.

■ Reference customers felt that the Alfresco implementation was straightforward, but that customizations, especially of user interfaces, can be complex and required knowledgeable support. The recently introduced ADF may mitigate the UI customization challenges.

Box

Box (https://www.box.com/) is a public company, founded in 2005 and based in Redwood City, California, U.S., with offices in Australia, Europe and Japan. Box's CSP provides governance, data protection, international data storage, content and metadata processing, risk management, lightweight workflow and collaborative application creation. Cloud-native APIs extend content services to enterprise systems and enable the building of custom applications for internal and externally facing use cases. The platform deploys as public cloud only, based in the vendor's own U.S. data centers. Box Zones allow for regional implementations of Box's data plane through infrastructure as a service (IaaS) providers such as AWS, Microsoft Azure or IBM's local data

centers in Asia/Pacific, EMEA, Latin America and North America. Box's GxP offering provides targeted solutions for organizations looking to satisfy validated system requirements and information auditing. Box's machine-learning-enabled metadata automation and Box Feed are only available through its beta programs. Box recently announced that its Box Skills Kit for pluggable AI will be generally available in December 2018.

Box Platform offers consumption-based pricing to enterprises looking to use Box as a CSP and to develop externalized content-based applications.

Strengths

- This vendor's vision emphasizes integrated, secure content experiences, applying intelligence to content usage and management. Box leverages various third-party machine learning (ML) products to automate content classification and to bring structure to unstructured data.

- Box has strong support for application integration and development. It has an extensive set of application interfaces, both native and available from partners, for common productivity and LOB applications, including Microsoft Office Online and SharePoint Online, Google's G Suite, Apple iWork, NetSuite, Workplace by Facebook, Slack, Quip and Salesforce. Preloaded application development templates for "citizen developers" enable rapid application development.

- Customer references gave positive evaluations for the accessibility of Box services across devices, simplicity and ease of use, modern UIs, and support for team collaboration. IT administrators appreciate the platform's simple setup and its security, certifications and controls.

Cautions

- Box's innovation focuses predominantly on user engagement with content and less so on data integration, records management or interfacing with enterprise information platforms.

- Box's platform has some limits that affect business and scalability requirements, such as search, indexing, large file storage (greater than 15GB) and workflow. For example, the workflow product (Box Relay) is unsuited to complex business process management (BPM) or case management, and its services only work with content in the Box repository.

- Business users who still consider Box to be a personal file syncing and sharing tool don't always recognize the opportunities that the CSP features — such as Box Governance and GxP — can offer. Buyers of the technology should clearly communicate the additional features to the business to get most value.

DocuWare

DocuWare (https://start.docuware.com/) is privately held, founded in 1988 and based in Germering, Germany, with offices in Bulgaria and the U.S. The product, DocuWare, is tightly integrated with Microsoft and Windows for more seamless user experiences in creating and

working with business documents. The platform features intelligent indexing for metadata management and content indexing. Vertical industry solutions focus on automotive, government (financial processes), manufacturing, education and retail. DocuWare Kinetic Solutions are prebuilt SaaS applications for common horizontal business needs such as employee management or invoice processing. Customers are able to purchase these applications directly from DocuWare.

DocuWare targets small and midsize businesses (SMBs), with dedicated sales and support directors in Europe, Latin America and North America.

DocuWare is a good fit for SMBs with document-centric processes aiming to modernize traditional content processes using agile, self-service, cloud-based models.

Strengths

- DocuWare enables customers of all sizes, including SMBs, to easily deploy imaging, document management, workflow, intelligent indexing and content archiving to modernize their content management capabilities.

- DocuWare integrates tightly with Microsoft Office and supports a high degree of automation (via the DocuWare Printer, Smart Configurator and Intelligent Indexing components). Within Microsoft Office editors, DocuWare enables seamless document management, plus personalized and user-customizable experiences.

- Reference customers cited DocuWare benefits in eliminating paper from document processes and improving process efficiency.

Cautions

- DocuWare lags behind other CSPs with regard to some key features, such as content analytics and interactive visualizations or dashboards of search results extracted from content and processes.

- Despite its focus on the SMB market, DocuWare's SaaS pricing is relatively high compared with that of its competitors.

- Reference customers indicated challenges in integrating DocuWare with their existing systems, and that professional services support is required for specialized integrations.

Everteam

 Everteam (http://www.everteam.com/) is privately held, founded in 1990 and based in Lyon, France, with regional offices in Asia, France, Hong Kong, India, the Middle East and the U.S. The Everteam platform has a broad set of content services modules, with a strong emphasis on information governance use cases. It can be deployed on-premises or on a private cloud supported by the vendor or partners. Its new "everteam.discover" user interface lets users find and work with information from different content sources. Everteam is enhancing the platform for

long-term information preservation with new connectivity, analytics and policy federation. It plans to enable pure SaaS solutions in the future.

Everteam focuses mainly on Europe and the Middle East, but continues growing in the U.S. The majority of its customers are midsize to large enterprises (fewer than 1,000 employees) especially in finance, healthcare, retail and government. It sells through channel partners, particularly in Europe and the U.S., and has an extensive and specialized partner network. In 2018, Everteam acquired the scanning specialist Spigraph, which further extended its reseller ecosystem in Europe.

Everteam is a good fit for customers that have information governance-driven requirements — particularly those in regulated industries and those that need to apply governance but maintain access to information in multiple locations.

Strengths

- Archiving, policy management and information discovery are particular strengths of this platform. Everteam focuses on providing tools that easily ingest large volumes of information from other repositories and enable users to interrogate that data to deliver insights as required.

- Everteam is especially strong in the Middle East — with one of the highest market share ratios for dedicated CSP providers in this region — and has an established network of experienced in-country system implementers.

- Reference customers for Everteam are very satisfied with their implementations and cited the high quality of technical support. They also considered their implementations good value for the money spent.

Cautions

- The user experience with Everteam is fragmented, because the CSP modules for different tasks are entirely separate applications. These applications include quite technical concepts that casual users might find difficult to navigate without significant training.

- Cloud offerings are only available via third-party providers. Customers should carefully evaluate both the product and the cloud partner that will host it.

- Compared with other CSPs, reference customers for Everteam cited longer implementation times, of six to nine months, even though they also said that deployment was relatively easy. This indicates that the additional time is spent in configuring CSP policies and content governance.

Fabasoft

Fabasoft (https://www.fabasoft.com/en) is a public company, founded in 1988 and based in Linz, Austria. It offers two on-premises CSP products, Fabasoft Folio and Fabasoft eGov-Suite, plus a Europe-based cloud offering — the Fabasoft Cloud. Fabasoft's cloud platforms also deploy via

appliances, making for simplified and rapid implementation in any cloud environment. In addition to many common security and cloud computing certifications (such as ISO 27001 and ISO 27018), Fabasoft Cloud data centers are certified by numerous European regulatory boards. Fabasoft's platform is optimized for building customized solutions, with app.ducx and app.test modules for modeling, developing and testing them. The vendor also has a range of ready-to-use solutions such as contact and contract management, personal and team productivity, digital asset management (DAM), and a General Data Protection Regulation (GDPR) toolkit. The adaptive client interface integrates with Microsoft Office, Microsoft Office Online and many other productivity tools. The platform also tightly integrates with the vendor's Mindbreeze InSpire, an enterprise insight, data analytics and search appliance. The vendor's primary market is Europe, with limited expansion in the U.S.

Fabasoft is a good match for regulated businesses with a need for content classification, insight, records and content life cycle management.

Strengths

- Fabasoft is focused on rapid and flexible deployment of scalable content services through appliances, prebuilt solutions and services that enable customers to transform paper-based manual work into efficient digital content processes.

- Fabasoft's products and services are especially suited to regulated industries including manufacturing, healthcare, finance and the public sector, and to businesses that are subject to GDPR and other regulatory oversight.

- Reference customers gave Fabasoft high satisfaction scores and would recommend Fabasoft based on ease of negotiation, timeliness and support quality, and its ability to understand customers' needs.

Cautions

- Fabasoft is slower to innovate than some of its CSP rivals, in part because its CSP vision focuses on stability, flexibility and rapid deployment.

- Fabasoft has limited sales and support outside of Europe.

- Reference customers reported that Fabasoft's administration interface was not intuitive and lacked reporting tools.

GRM Information Management

GRM Information Management (https://www.grmdocumentmanagement.com/) (GRM) is privately held, founded in 1987 and based in Jersey City, New Jersey, U.S., with offices throughout the U.S. and Latin America. GRM's VisualVault platform is a cloud-based microservices platform with an array of content services modules. The platform includes a forms designer, intelligent capture, publicly available APIs, prebuilt connectors, and solutions to meet many horizontal and vertical content processing use cases. Recent innovations include ML, application packages,

multimodal interfaces and predictive analytics. VisualVault is available as multitenant public or private cloud deployment options. The vendor targets midmarket and enterprise customers in healthcare, the public sector, human resources management, and the entertainment, architecture, and engineering and construction verticals. It has a growing presence in Latin America.

GRM is a good fit for customers in North America and Latin America looking for a comprehensive cloud-based CSP that supports team productivity, business processes and analytics.

Strengths

- VisualVault is a comprehensive CSP focused on delivering actionable insight as well as process management. The platform vision is built around digital business models for the agile delivery of core content services. The vendor offers a wide range of targeted horizontal and industry-specific solutions based on its platform.

- GRM's simple pricing model — built around customer size and vertically focused solutions — is attractive to business buyers. Its expansion into Latin America is unique in the CSP market.

- Reference customers for GRM thought VisualVault to be good value for money and gave high scores for its technical support.

Cautions

- Direct GRM sales and support is focused on particular regions, including North America and Latin America. Customers not within GRM's target markets might find it hard to get VisualVault, except through affiliated partners and managed hosting providers in those regions.

- VisualVault is only available as a cloud-based platform and does not support non-native repositories or federated content services.

- Reference customers for GRM reported that deployment times were longer than expected, especially for cloud-based environments.

Hyland

 Hyland (https://www.hyland.com/) is privately held, based in Westlake, Ohio, U.S. and with regional offices throughout North America, Latin America, Asia/Pacific and EMEA. The company's flagship platform is OnBase, which offers a wide range of content capabilities. Other content-related platforms in the portfolio include ShareBase, which features content collaboration platform (CCP) capabilities, and Perceptive Content, a CSP acquired from Lexmark in 2017. Another major addition from the Lexmark acquisition is Brainware, a capture engine powered by ML (replacing Hyland's legacy intelligent capture services in OnBase 16). OnBase is available as on-premises server software or as a cloud-based application managed service.

Historically used by North American midsize to large corporations, Hyland's acquisitions have spurred rapid growth in Europe and Asia/Pacific (Australia, Singapore and elsewhere). This vendor focuses primarily on healthcare, insurance, financial services, higher education, government and

manufacturing, with dedicated industry-focused teams covering everything from R&D through to sales for each vertical. Hyland delivers its products and services either direct or via an extensive partner network.

The comprehensive nature of Hyland's platform makes it a good fit for organizations looking to address a broad range of content-centric needs covering back-office processing, case management and information governance.

Strengths

- Hyland has a long history of well-executed business problem solving with its CSP platform, especially within Hyland's core vertical industries. This expertise mitigates the major user adoption risks that customers often face in CSP implementations.

- Hyland's acquisition strategy has brought significant value to its CSP platform and enhanced its R&D efforts. The Brainware acquisition in particular leverages ML to improve Hyland's capture capability and to innovate around content classification.

- Reference customers for Hyland gave the most recent OnBase product high scores in terms of function and solution. They liked the integration with ERP systems such as SAP and Workday, as well as core LOB applications such as Epic and Guidewire.

Cautions

- Given Hyland's new growth outside of North America, clients should carefully evaluate its local resources to ensure implementation and support can be covered effectively by Hyland and its partner channel.

- Hyland's relatively traditional architecture and integration framework lacks some key features when compared with rival offerings. Hyland is actively modernizing its architecture to include REST-based APIs for key content and process functions.

- Reference customers for Hyland in North America expressed frustration with the technical support, especially when building customized solutions. Many cited the need to have a strong plan and oversight of the implementation.

IBM

 IBM (https://www.ibm.com/uk-en/) , is a public company, based in Armonk, New York, U.S. and with offices around the world. The traditional content services products include FileNet Content Manager, Content Navigator, Case Manager/Workflow, Datacap, Content Collector and Enterprise Records. IBM also offers intelligent content analytics via products such as Datacap Insight Edition, Watson Explorer and Watson Natural Language Understanding. In March 2018, IBM announced its Automation Platform for Digital Business, an integrated, modular platform for content services, workflow and decision making. This new platform combines IBM's CSP (FileNet and Datacap), BPM, business intelligence (BI) and analytics offerings into a single, services-oriented platform. It leverages a responsive UI, Content Navigator (recently updated), as a unified

front end for all services that can be deployed in the cloud. The new platform supports centralized oversight and federated content governance across multiple repositories and applications. Customers can purchase individual product modules or the entire collection, including IBM's recently released SaaS offering, Content Services on Cloud, hosted on its public cloud.

Strengths

- IBM's vision is oriented to digital transformation through an integrated, modular and flexible platform that is geared to enhancing business processes and gaining insight into content.

- IBM has strong vertical industry expertise, especially in financial services, insurance and government. A well-developed, experienced network of system integration and independent software vendor (ISV) partners augments the internal sales and professional services teams.

- Reference customers for IBM liked the content management capabilities, security and scalability of its FileNet and Datacap content services.

Cautions

- The Automation Platform for Digital Business is a big shift for IBM customers. It will take some time for IBM to fully communicate the platform's value proposition to its large installed base. Many of the FileNet customers Gartner talks to are not yet aware of this new opportunity.

- The Automation Platform for Digital Business is still under construction, some integration is not yet fully completed or optimized. Existing customers and new buyers should verify the availability of features in the new platform.

- While reference customers gave positive ratings for FileNet's functionality, FileNet rated lower on value for money spent and technical support. Note that these ratings apply to previous versions of FileNet and not to the Automation Platform for Digital Business or the SaaS version of FileNet, which shipped early in 2018.

Laserfiche

 Laserfiche (https://www.laserfiche.com/) is privately held, based in Long Beach, California, U.S. and with offices in Vienna, Virginia U.S.; Toronto, Canada; Shanghai, China; Hong Kong; London, U.K.; and Guadalajara, Mexico. The fully featured CSP offering is available on-premises (Laserfiche) or as a SaaS offering hosted on AWS (Laserfiche Cloud). Private and managed hosted deployments of Laserfiche can be acquired through its partners. Laserfiche and Laserfiche Cloud also include file syncing and sharing, document collaboration and secure offline document access. Laserfiche Cloud offers its new Business Rules, a feature that allows business users to incorporate business logic into workflows without using code. An array of APIs support application development, advanced forms-based process creation and content-centric business process development (using visual workflow designer tools). It includes an expanded dashboard for centralized monitoring of processes as well as user-friendly workflow rules management. The platform is available in all regional markets, through direct sales and value-added reseller (VAR)

partnerships, and has an extensive global partner ecosystem. Vertical specialties are in government, financial services, higher education, healthcare and manufacturing.

Laserfiche is a good fit for customers that want traditional content management plus out-of-the-box business process solutions for digital transformation.

Strengths

- Laserfiche's vision focuses on digital transformation of content in the enterprise by bringing modern, multimodal interfaces and agile workflow design capabilities to customers and business users.

- In 2017, Laserfiche experienced significant growth, especially in its cloud business, and expanded its R&D resources. It now takes a cloud-first approach to developing new features. It has introduced flexible pricing models, including temporary users for peak activities, and programs to help customers migrate from legacy systems.

- Laserfiche scored highest in reference customer satisfaction for value for the money spent. It had strong satisfaction scores overall, especially for negotiation, technical support and its peer community.

Cautions

- The R&D shift of Laserfiche to focus on agile, cloud-first development will slow the addition of new capabilities for its on-premises customers, who still experience longer update schedules.

- The cloud offering currently lacks some features found in the on-premises offerings, such as Laserfiche Workflow. Customers should verify that the functionality they require is present when evaluating Laserfiche Cloud.

- Some reference customers for Laserfiche reported deployment times as being longer than average.

M-Files

 M-Files (https://www.m-files.com/) is privately held, based in Tampere, Finland, with its North American headquarters in Plano, Texas, U.S. and regional offices in Australia, Canada, France, Germany, Sweden and the U.K. The most recent version of the M-Files platform was released earlier in 2018. The platform is available on-premises or as hybrid cloud or private cloud SaaS, with a public cloud multitenant option. M-Files is very closely aligned to the Microsoft ecosystem: Azure hosts the cloud product; the platform includes many Microsoft components (such as Microsoft Office and SharePoint Online); and the user experience integrates tightly with Windows. M-Files focuses on content integration services through federated multirepository support and manage-in-place capabilities. Its Intelligent Metadata Layer (IML) component, which has been generally available since early 2018, lets users bring M-Files metadata-based services to content and information that resides in a wide range of other repositories.

The M-Files customer base is primarily small to midsize enterprises (those under 1,000 employees). Globally, the vendor has a key presence in manufacturing, and professional and financial services, with a growing public sector presence in EMEA.

M-Files is a good fit for organizations with a Microsoft-centric IT strategy, and also for organizations that are struggling to manage and get value from a multitude of content repositories. Its GDPR solution, together with its repository-agnostic approach, makes it an interesting proposition for organizations struggling to manage their GDPR commitments.

Strengths

- M-Files offers cloud-based services that have full feature parity with its on-premises products, and a true SaaS service that automatically updates as new releases are available. This contrasts with the more common practice of many CSP vendors who offer private cloud and managed services.

- M-Files delivered on its commitment to provide repository-agnostic intelligent services, with the release of its Intelligent Metadata Layer. The acquisition of Apprento in 2017 adds native AI capabilities to M-Files' content services.

- Reference customers reported that the M-Files CSP offering is relatively easy to implement. They were positive about M-Files' professional services — and the wider partner network — delivering the product effectively.

Cautions

- M-Files' industry alignment is less apparent than with other CSP market leaders. Its sales and marketing teams are industry aligned, but research and development are not — resulting in fewer vertical solutions.

- M-Files customers tend to be small to midsize accounts, with greater demand from large enterprises more recently. Customers planning large-scale deployments — in terms of users, content storage and transaction volumes — should verify their infrastructure needs with M-Files.

- Some of M-Files' reference customers expressed dissatisfaction with the postimplementation aspects of the M-Files service, including end-user training and support.

Micro Focus

Micro Focus (https://www.microfocus.com/) is a public company based in Newbury, U.K. The Micro Focus CSP (formerly HPE Software) is part of its Secure Content Management (SCM) portfolio. SCM includes a set of integrated content and data management services built on top of Micro Focus Content Manager (CM). These services can be combined to bring together content processing and records management, content analytics, content life cycle management and structured data protection. Intelligent analytics supports large volumes of unstructured and structured content alike. Key technical partnerships with vendors such as Iron Mountain,

Objective and Microsoft (for SharePoint integration) expand the Micro Focus SCM offering. The SCM platform deploys on-premises or as managed hosted services through certified partners. Micro Focus has increased its focus on privacy and GDPR compliance capabilities. Its prebuilt Data Privacy Readiness Starter Packs include data assessment, personal data discovery (structured and unstructured data), content management data privacy readiness, and application retirement capabilities aligned to common privacy use cases. The platform targets regulated industries such as life sciences, financial services, government, oil and gas, and manufacturing.

Micro Focus SCM is a good fit for regulated enterprises with large volumes of content and data, and in need of content life cycle management, records management, analytics and enterprise information management.

Strengths

- Micro Focus' SCM has a strong value proposition built around reducing risk and securing enterprise information through intelligent tagging of information. This enables centralized governance and discovery, and responsiveness to regulatory mandates such as GDPR.

- The SCM business is a growing part of Micro Focus's overall business, bringing additional development resources to innovate on CSP intelligent analytics and privacy solutions.

- Reference customers for Micro Focus scored its support highly and cited the stability of the product as a strength.

Cautions

- The holistic SCM suite of products that Micro Focus offers, while powerful, may be overwhelming for customers looking for more generalized content services.

- The MicroFocus CSP products are still catching up with the competition in terms of the innovation and expansion of the platform's capabilities. Comparatively weak areas include the limited deployment models, aging user experience, and lack of integration with common LOB solutions.

- Reference customers for Micro Focus noted that implementations and upgrades were complicated, and the user interface was not modern.

Microsoft

 Microsoft (https://www.microsoft.com/en-gb/) is a public company, founded in 1975, based in Redmond, Washington, U.S. and with offices worldwide. Microsoft's CSP is SharePoint, including on-premises SharePoint Server and cloud-based SharePoint Online (often purchased as a bundle with Office 365). SharePoint is tightly integrated with Microsoft Office applications, including OneDrive for Business, Microsoft Teams and Flow. Microsoft Graph supports insight-oriented content processes and contextual experiences. Microsoft's content services are part of its intelligent content services layer designed to orchestrate the use, creation, sharing, protection and management of all content. Microsoft sells SharePoint via direct sales and through a big network

of partners, ISVs and developers. Office 365 and specifically SharePoint Online run on Microsoft's cloud infrastructure and global support operations, enabling regional data residency and compliance with privacy regulations, including controls to assist with GDPR requirements. Microsoft offers content migration to Office 365 with an out-of-the-box migration tool, through FastTrack services, to organizations with 500 or more licensees, and together with qualified partners.

SharePoint is a good fit for organizations with deep Microsoft investments for productivity and business processing. It suits organizations that aim to use an integrated, cloud-based platform to enable digital workplace scenarios.

Strengths

- SharePoint reflects a continuum of services across the entire content life cycle, encompassing individual productivity, team collaboration, content management, process automation and workflow. It is enabled by a unified cloud-based platform that includes AI capabilities for content insight and process automation.

- SharePoint has been improved to support increased single file sizes, larger storage volumes, optimized indexing and a better user experience with large file sets.

- Reference customers scored SharePoint highly for its document handling functionality, metadata options and search, citing these as key features in developing corporate intranets.

Cautions

- SharePoint as a stand-alone platform — without other Office 365 capabilities — requires add-ons and/or third-party tools for more complex scenarios such as records management, workflow and extended collaboration.

- SharePoint does not include ad hoc capabilities or prebuilt solutions to address the requirements of specific verticals. Native integrations to external systems are not as strong as third-party integration solutions or a BPM layer.

- Reference customers indicated that Microsoft's Consulting Services lacks technical expertise and referred to the Microsoft Product Group for advice, thereby delaying project completion.

Newgen

Newgen (http://www.newgensoft.com/) is public company based in New Delhi, India, with regional offices in Australia, Canada, Dubai, Singapore, the U.K. and the U.S. Newgen's OmniDocs ECM Suite is a fully featured CSP that includes a number of product modules to handle document management, multichannel capture and scanning, records management and content analytics. Other products provide important add-on capabilities, such as workflow/process management (OmniFlow intelligent business suite; iBPS) and external collaboration (Corrus). Newgen provides a wide range of industry-specific vertical solutions and accelerators developed on top of its

platform. The microservices architecture makes it possible to tailor the platform for specific business needs and for integration into other services.

Newgen has a strong presence in India and Asia/Pacific, with a growing presence in EMEA and the Americas. Newgen sells direct or via partners, depending on territory. Specialties for Newgen include financial services, government, insurance and healthcare. Newgen also offers flexible pricing structures, including traditional on-premises licensing and maintenance, SaaS-based subscriptions, and scenario-based pricing — such as value- or transaction-based.

Newgen's solution focus makes it a compelling proposition for clients in the financial services, insurance and government sectors. Its extensive functionality and options make it a good fit for organizations of any size looking to support digital business initiatives where content is a key component.

Strengths

- The Newgen platform offers customers a single, simple integrated set of services, which are improved through continued, active investments.

- Newgen's vertical strategy and portfolio of solutions, applications and accelerators creates business solutions that can potentially lower deployment risks and shorten deployment times. These vertical solutions are mainly in financial services, government, insurance and healthcare.

- Reference customers for Newgen scored their commercial negotiations with the company very highly, due to its flexible pricing structures.

Cautions

- Newgen's user experience is inconsistent across the various modules. The OmniDocs web client has recently been reworked and, as such, looks modern and easy to use. However, many of the other modules of the product suite have yet to be updated.

- The platform rarely appears in European or North American RFP shortlists that Gartner reviews. This is likely to be due to Newgen's industry-targeted sales and go-to-market strategy. Buyers in nontargeted industries should carefully evaluate localized sales and support.

- Despite the range of industry solutions available, reference customer feedback indicated that Newgen implementations can be quite complex, due to the customization approach of its product model.

Nuxeo

Nuxeo (https://www.nuxeo.com/) is privately held, based in Brooklyn New York, U.S. and has other U.S. offices in Washington D.C. and Los Gatos and Irvine, California. Additional offices are in Paris, France; Tokyo, Japan; Lisbon, Portugal; and London, U.K. The Nuxeo Platform, introduced in 2008, is an open-source, services-oriented CSP available on-premises, in private cloud, as multitenant SaaS or in various hybrid deployments. The Nuxeo Platform is a modular and scalable

content services platform for document management, content collaboration, digital asset management, case management and core business processing of enterprise content. This vendor has begun provisioning SaaS-based applications, its first SaaS offering for brand management was delivered in early 2018.

The Nuxeo Platform supports an array of popular open-source components that support intelligent content analysis and insight, multiple and non-native repositories, and business process integration. Its federated content services let customers manage data and repositories "in place," reducing legacy content migration. The modular platform integrates best-of-breed technologies, as well as Nuxeo's own technologies, including Elasticsearch, Ephesoft, Gimmal, Google Vision and Simflofy. The Nuxeo Platform is optimized for rapid content application design and customization. Nuxeo has been successful among midsize to large enterprises, especially in financial services and federal government. It currently targets financial services, and technology and public-sector organizations, as well as consumer products, retail, manufacturing, entertainment and media organizations that require digital asset management (DAM).

Nuxeo is a good fit for customers that plan to develop customized content services, applications and extensions for LOB applications and systems.

Strengths

- Nuxeo's platform emphasizes IT modernization and rapid deployment through a services-oriented architecture and platform that works with multiple and non-native repositories. This approach is especially helpful within legacy or distributed content environments.

- The Nuxeo Platform is scalable and flexible, and its support for open-source components can streamline development activities. With numerous options, customers can integrate with, and design content applications that support, an array of business process use cases.

- Reference customers scored the quality of the Nuxeo product and its capabilities as being above the average compared with other products in this Magic Quadrant.

Cautions

- Nuxeo's vision is more broadly focused on content services, rapid application development and insight use cases, rather than delivery of specialized vertical solutions. Customers looking for specific out-of-the-box vertical or horizontal solutions will find Nuxeo lacking.

- Nuxeo is a relatively new entrant into CSPs and is still maturing its capabilities. It does not offer native records management and capture. These capabilities are provided through out-of-the-box integration with best-of-breed services, content productivity and collaboration platforms.

- Reference customers gave Nuxeo below-average scores in negotiation, responsiveness, support and service dimensions. Nuxeo's recently restructured its sales and a new customer success team may mitigate these issues.

Objective

Objective (http://www.objective.co.uk/) is a public company based in Sydney, Australia with offices throughout Australia and New Zealand, and Singapore, the U.K. and Washington, D.C., U.S. The modular Objective CSP has seven content services components covering functions such as document management and interfaces, collaborative content management, secure external collaboration and content governance. Objective ECM also includes Exalead's CloudView content analytics engine for autoclassification, entity extraction and sentiment analysis. The Objective Design Language is an adaptive user interface design framework that has been ported to all modules for a consistent modern experience. The modular services platform supports non-native repositories and integration with business applications. It is available on-premises, and in private cloud, managed hosted or multitenant SaaS delivery models.

Objective specializes in the public sector and highly regulated industries in its target geographies. Its global reach is limited, being focused predominantly on regional markets. Objective has developed technical partnerships with Micro Focus and Microsoft. This has led to significant integration for enhanced productivity experiences, records management, data integration and cloud platform options.

Objective is a good fit for government, public sector and highly regulated organizations — construction, social services, public finance — looking for content-enabled business applications that ensure compliance and information governance.

Strengths

- Objective has a strategy to bring its content services to bear on other dominant repositories in its target market, such as Micro Focus Secure Content Manager and Microsoft Office 365 (SharePoint Online). This lets customers focus their migration decisions on those areas of most value to the business, and avoid high-risk migrations.

- Objective provides a modular approach to many of its content services — such as workflow, via Perform, and complex document creation via Keystone — that can also be valuable to other content repositories.

- Objective's reference customers were pleased with their relationship with Objective, due to its direct services engagement model, and reported that the product made a significant impact on their content management practices.

Cautions

- Objective's content services solutions are focused almost exclusively on the government and public sector markets, with little to offer other industry verticals without specific regulatory requirements.

- As a smaller vendor, Objective is slower to deliver advancements and new features to the market. Expansion outside of its region is incremental; multirepository support is limited to

Microsoft SharePoint and Micro Focus SCM, and only four of its modules are available as SaaS options — Connect, Trapeze, Redact and Keystone.

- Some reference customers for Objective were dissatisfied with pricing and terms and cited that the modular pricing model compounded costs. Customers should evaluate recently released subscription models for comparison.

OpenText

 OpenText (https://www.opentext.com/) , is a public company based in Waterloo, Ontario, Canada, with more than 125 offices around the world. It has a large content and information product portfolio. The vendor offers two CSPs: Content Suite Platform and Documentum Platform — which it acquired in early 2017 from Dell EMC. Both are available as on-premises, managed hosted, private and public cloud, multitenant SaaS and hybrid deployment models. There are add-on content modules for functions such as web-based content management and sharing, capture, web-based workflow and analytics. OpenText CSPs integrate with many business applications including those from SAP, Salesforce and other enterprise systems.

OpenText has a global reach, and penetration into most industry verticals and regional markets. It has a large and extended ecosystem of partners, resellers and system integrators to complement its direct sales and support.

OpenText is a match for regulated industries and firms looking for expansive content services that meet numerous use cases, and for business processing of unstructured content.

Strengths

- With an increasing focus on cloud delivery, OpenText's CSPs can act as a "backbone" enterprise content platform for all content services application needs. Its CSP capabilities extend into horizontal apps (Core), vertical apps (engineering, legal, life sciences) and LOB integrations (SAP, Salesforce).

- OpenText's extensive partner ecosystem — including integrators, technical partners, resellers and ecosystem partners (SAP, Microsoft, Salesforce, AWS) — makes expertise easier to find in comparison with some competitors.

- Reference customers cite strong overall satisfaction with OpenText's CSP products, pointing to depth of functionality and stability, especially for records management, capture and document management.

Cautions

- OpenText's complex and overlapping product portfolio can be confusing for users. The complexity has the potential to dilute its investment in innovations. The expansion of cloud-based services and new SaaS business models is a new business model for OpenText and may add to that confusion in the near term.

- OpenText's singular content services "backbone" value proposition means full acceptance of the complete platform capabilities and requires migrating all content to OpenText repositories to leverage all its services. Customers should consider evaluating the value of their content prior to any migrations.

- Some reference customers for OpenText cited complexity, cost and resource effort as drawbacks to their implementations.

Oracle

Oracle (http://www.oracle.com/) is a public company based in Redwood City, California, U.S. and has a large international presence. This vendor offers two major CSP product suites. One is Oracle WebCenter Suite Plus, which has standard CSP capabilities such as document management, records management and workflow. It is available as on-premises software, with options for private cloud or an Oracle application managed service. The second suite is Oracle Content and Experience Cloud, which is a multitenant SaaS solution. The Content and Experience Cloud offers simpler content management capabilities aimed at extending WebCenter with internal and external collaboration features. The Content and Experience Cloud can also be used as a stand-alone web content hub for publishing and digital asset management. Hybrid solutions that utilize WebCenter and Content and Experience Cloud are possible, with native out-of-the box integrations for Oracle imaging, forms recognition and capture. Publicly available APIs can be used for data integration across platforms.

Industry and horizontal solutions based on these platforms are typically built by the extensive ecosystem of development and system integration partners. Oracle targets large, global enterprises across all sectors for WebCenter. The Content and Experience Cloud solution supports the midsize enterprise market more directly.

Oracle is a good fit for customers that already have Oracle systems, especially its ERP solutions, and want the flexibility of hybrid on-premises and cloud-based content services deployment.

Strengths

- Oracle has an effective strategy for moving customers to the cloud. This includes a pathway to move clients from on-premises WebCenter to an application managed service, and the ability to further extend their investment with a hybrid cloud collaboration scenario in Content and Experience Cloud.

- Oracle provides native integration for WebCenter into other applications in its extensive portfolio, specifically the Oracle E-Business Suite, making it a good choice for customers with an application strategy based around Oracle products.

- Reference customers for Oracle praised the ease with which its products integrate with each other and provide complimentary capabilities. This is not always the case with vendors that have very large application portfolios.

Cautions

- Oracle's Content and Experience Cloud is built for web and multichannel content management, but not for CSP use cases such as document management, records management, capture and business processing of content. Customers looking for a full CSP will need to consider the combined benefits of WebCenter (on-premises or virtual cloud) and Content and Experience Cloud.

- The last release of Oracle WebCenter was in August 2017. This could indicate a lack of strategic focus on the product.

- Reference customer scores placed Oracle among the lowest in this Magic Quadrant in terms of overall value for money. Common complaints were about relatively lengthy implementations and issues with implementation partners. Potential clients should scrutinize Oracle's partners to make sure they have the necessary expertise for their implementation.

SER Group

 SER Group (https://www.ser-solutions.com/) is a private company based in Bonn, Germany, with subsidiaries and local branch offices across China, Europe, India and Latin America. The Doxis4 platform is built around a centralized metadata core, with unified content management, BPM and collaboration services. The platform features out-of-the-box solutions (such as case management and business process templates), public APIs, and prebuilt connectors to commonly used productivity applications and legacy systems. It has non-native repository support and a business-user-oriented workflow designer. Its analytics and automation capabilities leverage ML to automate content capture, classification and content metadata management. Doxis4 can be deployed on-premises, in private clouds or as managed hosted services. SER also offers a multitenant SaaS platform, Doxis4 Cloud, which includes file syncing and sharing.

SER Group is composed of several separate regional companies, each with dedicated sales and support resources. It has dedicated sales and support for target verticals, including government, healthcare and banking.

SER Group is a good fit for regulated EMEA and Asia/Pacific enterprises wanting comprehensive CSP and business application enablement capabilities that can be adapted across large content ecosystems, as well as across various working scenarios, locations and industry-specific needs.

Strengths

- SER's vision for content services and processing is built around extensibility, federation and intelligence as well as unifying experiences and processes. The Doxis4 platform multirepository federation and capabilities bring content and data from other sources into the Doxis4 user interfaces and workflows.

- SER is a long-standing vendor with a solid history in Europe, (particularly the DACH region of Germany, Austria and Switzerland) for content management and is expanding its global reach, especially in Asia/Pacific.

- Reference customers scored SER's configurability, ease of deployment and time to implement as better than average. All reviewed customers would recommend Doxis4 to others.

Cautions

- SER's Doxis4 depends on its ability to innovate with AI and federated services, which are in continuous development. This includes, unified interfaces, platform integration, automation and federation capabilities.

- SER's R&D team builds all of its technology in-house, which can slow innovation and increase the time taken to bring new capabilities to market. It is currently in the process of adding advanced analytics with AI. Federation is limited to search and archiving only.

- Reference customers for SER noted that out-of-the box implementation was straightforward, but customizations and deep integrations required more planning to address complexity.

Vendors Added and Dropped

We review and adjust our inclusion criteria for Magic Quadrants as markets change. As a result, 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

- GRM Information Management

Dropped

- Comarch — Did not meet our 2018 geographic inclusion criteria, which require having an established customer base and localized support (direct or via partners) in at least two major regions. Its business remains localized, limited to Eastern European buyers — a market that is well represented by many vendors in this Magic Quadrant.

- iManage — The vertical focus of iManage on the legal sector is out of scope for this year's CSP Magic Quadrant.

Inclusion and Exclusion Criteria

The inclusion criteria represent the specific attributes that Gartner has determined to be necessary for inclusion in this year's Magic Quadrant.

For 2018, Gartner has:

- Updated three inclusion criteria — revenue, installed base and geography

- Retired three — content services, platform services and integration

Inclusion Criteria

To be included, a vendor *must* meet the following five criteria:

- **Offering**. Vendor has a generally available enterprise CSP offering that is offered as a separately billed, stand-alone product. The product must be generally available before 1 April 2018.

- **Revenue** (updated in 2018). Vendor must have had at least $20 million in total revenue derived from CSP sales in 2017, or have a demonstrated revenue growth rate of 40% from 2016 to 2017. Total CSP revenue derives from sales of:

  - Licenses — The right to use the software based upon contract type (perpetual or term license)

  - Cloud-based services — Revenue for cloud services including business process as a service (BPaaS), IaaS, PaaS and SaaS

  - Subscriptions — Annual fees for licensed, on-premises software, as well as license revenue for single-tenant managed services (such as hosting)

  - Technical support and maintenance fees — Contract fees for support services (not including training), new versions, updates and upgrades

  Total CSP revenue excludes revenue from professional services and the sale of products manufactured by other vendors. Revenue arising from customer requests for software changes may not be considered, even if such changes are subsequently incorporated into the core CSP offering. Increases in software license charges as a result of such changes can, however, be considered.

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

- **Installed Base** (updated in 2018). The current installed base as of 1 April 2018 must meet the following criteria:

  - The total number of customer organizations must be greater than 200

  - 20% of the deployments must have more than 1,000 seats

- **Geography** (updated in 2018). The vendor actively markets its products and has an established customer base with localized support (direct or via partners) in at least two major regions. For example, North America and Europe, the Middle East and Africa (EMEA), or Asia/Pacific (APAC) and Latin America.

Retired Criteria

Several inclusion criteria from the 2017 Magic Quadrant for CSPs have been subsumed into our critical capabilities requirements (for details see Note 2). These elements are not retired so much as they are now considered key capabilities for any CSP. All CSPs must offer these features either through native functionality or integrated technology by the vendor or third parties.

- **Content Services**. Vendor provides integrated content services natively or as active third-party technical integrations, providing services that support the following content-related activities:

    - Repository services

    - Capture and ingestion

    - Management and retention

    - Business processing

    - Usability and navigation

    Optional services (for example, content analytics and BI, web content management, file sync and share) may be supplied through partners or integration. Features provided by partners must be tightly integrated with the vendor's product and transparent to the end user.

- **Platform Services**. Vendor includes services and tools to support CSP management, security and deployment. Vendor must provide native and integrated platform services, including but not limited to:

    - Content security — multifactor authentication, policies, malware scanning, classifications, SAML, key management, encryption in transit and at rest, legal holds

    - Repository — native repository with support for multiple and external repositories

    - Data management — geolocation, data residency, storage, disposition, backup and restore

    - System optimization — usage statistics, scalability

    - Deployment options — on-premises, cloud, hybrid, managed services

    - Client interfaces — web, desktop, mobile apps

    - Admin — central management console, policy management, usage dashboards, group management, user provisioning, content usage analytics and dashboards

- **Integration**. Vendor must offer integration capabilities through publicly available APIs, native connectors, extensions, plug-ins and interfaces with Electronic Data Interchange (EDI), line of

business (LOB) applications, human resources management systems (HRMSs), CRM, ERP, Content Management Interoperability Services (CMIS) and so on.

Honorable Mentions

Gartner surveyed more than 28 vendors and 31 products for this report. The CSP market includes many other vendors that offer platforms. These vendors may not, however, meet the current inclusion criteria, or have only a fraction of the market share of some extremely large competitors. Acquisitions in 2017 by OpenText (Documentum) and Hyland (Perceptive Content) not only doubled their market share and installed base, but gave them multiple CSP offerings to evaluate in the related Critical Capabilities report. Vendors with a regional focus, a vertical specialization or cloud-only platforms are often not as well-known as their larger rivals with broader functionality, business models and packaging.

We include a list of "honorable mentions"— vendors that did not meet our 2018 inclusion criteria yet have content services qualities and capabilities that clients may find valuable. These vendors are listed below in four categories:

- **SaaS content services** — ASG Technologies Group

- **SaaS content services with strong product alliance** — AODocs (G Suite); SpringCM (Salesforce)

- **Regional focus** — Comarch (EMEA); d.velop (EMEA)

- **Industry vertical** — iManage (Legal); NetDocuments (Legal)

Evaluation Criteria

Ability to Execute

Gartner analysts evaluate technology vendors on the quality and efficacy of the processes, systems, methods or procedures that:

- Enable them to be competitive, efficient and effective

- Benefit their revenue, retention and reputation

Ultimately, vendors are judged on their ability to capitalize on their vision and their success in doing so (see the Evaluation Criteria Definitions section for additional details on each criterion).

Ability to Execute measures how well a vendor is able to sell and support its CSP products and services. Vendors are also rated on their financial viability, using a standard Gartner methodology that does not equate size with financial stability. Customer feedback and other information about current installed base, customer support and customer satisfaction are also considered, as is information about migrations.

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 2018)

Completeness of Vision

Gartner analysts also evaluate technology vendors on their ability to convincingly articulate logical statements about the market's current and future direction, innovation, customer needs and competitive forces, and on how well these statements match Gartner's perspective. Ultimately, technology vendors are judged on their understanding of how market forces can be exploited to create opportunities for them to add customer value.

Completeness of Vision focuses on a vendor's ability to perceive where a market is going, or where it should go, and to act on that vision. This ability may be demonstrated by, for example, a vendor's use of new sales models, introduction of new products, creation of new markets, or entry into vertical markets with new products. A vendor might succeed financially in the short term without a clearly defined vision or strategic plan, but it will not become a Leader on that basis. A vendor with average vision anticipates change by accurately perceiving market trends and exploiting technology. A vendor with superior vision anticipates, initiates and directs market trends, particularly if it integrates its vision for a broad range of areas and capitalizes on its product and service development.

Part of our assessment involves examining how well each vendor understands the changing requirements and market trends. We evaluate vendors on their awareness and adoption of emerging functionality and on their technical architecture. Examples of strong vision include:

- The ability to integrate on-premises, cloud and non-native repositories

- Business application interaction

- Vertical solutions and business processing

- Collaborative authoring features

- Content analytics, machine learning and artificial intelligence

- Automation of content processes and tasks

- Services and microservices platform architectures with public APIs and connectors

- Deployment and licensing models for on-premises and/or cloud-based delivery options

- Got-to-market plans for different vertical, geographic and enterprise-size market segments

Table 2: Completeness of Vision Evaluation Criteria

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

Source: Gartner (October 2018)

Quadrant Descriptions

Leaders

Leaders have the highest combined scores for Ability to Execute and Completeness of Vision. They are doing well and are prepared for the future with a clearly articulated vision. In the context of CSPs, they have strong channel partners, presence in multiple regions, a consistent financial performance, broad platform support and good customer support. They are very strong in one or more technologies or vertical markets. They deliver a suite of technologies that addresses the demand for direct delivery of most (if not all) of the 15 critical capabilities of CSP software (listed in Note 2), which is tightly integrated and that is unique or best of breed in each area. Leaders

offer enterprise deployments; integration with other business applications and content repositories; incorporation of social, cloud and mobile capabilities; and vertical and horizontal solutions. Leaders drive market transformation.

Challengers

Challengers offer good functionality and have a substantial number of installations, but they lack the vision of Leaders. Typically, they do not possess all of the essential functional components of CSP software — or as many as the Leaders do. Instead, they use partnerships to fill out their suites, or simply ignore some capabilities or markets altogether. Challengers may lack a broad CSP focus or wide geographic coverage, but they execute well despite some product or market share limitations.

Visionaries

Visionaries may offer all of the essential functional components of CSP software natively (see Note 2). Alternatively, they may supply some of them through partnerships with other vendors. In some cases, Visionaries need to integrate acquisitions into their existing product portfolios. Visionaries typically show a strong understanding of the market and anticipate shifting market forces. They may lead efforts relating to standards, new technologies or alternative delivery models, but they have less Ability to Execute than Leaders do.

Niche Players

Niche Players typically focus on specific categories of CSP technology (such as transactional content management technology), midmarket buyers, or supplements to the offerings of business application or "stack" providers. They may be vendors that are still ramping up their CSP efforts, or that have neither the Completeness of Vision nor the Ability to Execute to break out of the Niche Players quadrant. Some may be "boutiques" that serve only certain regions, industries or functional domains.

Context

In broad terms, CSPs embody the following characteristics:

- A platform orientation, including service-oriented architecture, integrated content repository, and content-related services and user interfaces.

- A services-led architecture that enables content-oriented capabilities in 15 functional areas (see Note 2).

- Offering SaaS delivery of the platform services, although many vendors offer a mix of delivery models from on-premises, virtual private cloud, managed hosted services, multitenant public cloud (SaaS) and hybrid options for customers.

- Agile and flexible services and interfaces that can be customized, extended and integrated through publicly available APIs, connectors to commonly used productivity, ERP and LOB applications.

- Innovation in content-related processes, especially around leveraging AI and ML to automate tasks, enhances metadata and provides proactive insight based on enterprise content assets.

- Enable digital transformation by means of interfaces that link content assets with transformative initiatives such as digital dexterity, digital workplace and digital business. Use cases and activities for these include document management, team-based productivity, records management, back-office business processing and business application enablement.

Although not a requirement, the CSP may also include prebuilt, content-oriented applications for horizontal and vertical business processes.

There are important differences in the platform approaches among CSP offerings, and it is here that vendors are competing to innovate and differentiate their products. While the boundaries are not hard, there are distinguishing characteristics that buyers should consider when evaluating the products and finding the best fit for their content services strategies.

Centralized and integrated suites. These are single-repository systems that include a complete set of content-related services (see Note 2). The services are optimized around content control and processing of unstructured documents, often for specific horizontal or vertical content processes. Vendors with such platforms offer well-integrated content management capabilities and interfaces to support the processing of unstructured documents from capture through life cycle management. These vendors typically maintain their traditional focus — highly integrated, strong domain expertise — but increasingly offer greater openness for connecting to business and productivity applications. Most provide multiple delivery options (on-premises, cloud and hybrid).

Example vendors in this Magic Quadrant: Alfresco, DocuWare, Fabasoft, Hyland, IBM, Laserfiche, Micro Focus, Microsoft (SharePoint), Newgen, OpenText and Oracle.

Federated services layers. Cloud-based, service-led architectures that support the use and management of unstructured content across diverse content ecosystems, use cases and applications. Vendors in this category optimize around microservices, multiple and non-native repositories, logical layers, publicly available APIs, and centralized management. The benefits include customization, extensibility and hybrid architectures. These vendors differentiate around flexibility, agility, integration and cloud delivery models (although they are not restricted to cloud delivery). Innovations include support for multiple and non-native repositories with manage-in-place capabilities, rapid deployment (especially SaaS), ad hoc business user development of lightweight workflow, and enhanced engagement via extended collaboration and multimodal device support.

Example vendors in this Magic Quadrant: Everteam, M-Files, Nuxeo, Objective and SER Group

Content services platform as a service (CS PaaS). Cloud-based platforms consisting of a set of services and microservices that enable organizations to exploit diverse content types and fulfill content-centric use cases across the business. These are "born in the cloud" platforms,

applications and services. They emphasize digital transformation through business application enablement and user engagement with content through multimodal interfaces and devices in agile and customizable environments. A CS PaaS, however, has the potential to simplify deployment, shorten development cycles and provide greater ongoing flexibility. The emergence of CS PaaS content services is a critical change in this market.

Example vendors in this Magic Quadrant: GRM Information Management and Microsoft (Office 365).

Application leaders in charge of content services should:

- Evaluate CSP offerings by first examining their organization's critical use cases and the related functional needs.

- Develop a content services strategy that prioritizes content-related functionality to enable digital transformation, and that aligns business needs — functional, use case and delivery — with the most appropriate CSP.

- Adopt content practices to address these functional needs, by working closely with business users to enable delivery of user-friendly, modern and seamless content experiences.

- Exploit the CSP for business value innovation by segmenting your use cases into types that balance:

  - The necessary level of centralized control and oversight

  - The flexibility of ad hoc usage and experimentation

A Magic Quadrant provides a visual snapshot of the market as we define it, together with in-depth analysis and actionable advice. Use this Magic Quadrant as only *one* aid to the selection of a CSP vendor. The companion Critical Capabilities report should be another essential input to your decision making, especially for finding vendors that differentiate themselves in particular use cases. The final selection criteria must reflect your organization's particular functional and technical requirements and business objectives. Do not, for example, select a quadrant Leader or reject a quadrant Niche Player simply on the basis of the label. Begin by looking at any vendor that meets your "must have" requirements. A vendor in any one of the four quadrants could be the best choice for your particular needs.

Market Overview

Beginning in 2017, Gartner's CSP market share is tracked in combination with the content collaboration platform (CCP) market, for an overall worldwide content services software market (see "Market Share: Content Services, Worldwide, 2017"). The market showed the following activity during 2017:

- The worldwide content services software revenue totaled $9.6 billion in 2017 (up from $8.4 billion in 2016). The overall market grew 15.7% in U.S. dollars in 2017 (down from 16.0% in

2016).

- The CSP market makes up the majority, 66%, of the overall content services software market — at $6.4 billion.

- Microsoft, OpenText and IBM retained the top three positions in the CSP market, while OpenText showed the highest organic growth — largely due to acquisitions.

- The majority of sales in the content services software market remain in North America and Western Europe. Approximately one-third of the market is outside of those two regions, with sales in Asia/Pacific leading those in Latin America.

Gartner expects growth in the CSP market to stabilize as the shifts in revenue and installed base settle down after 2017 product acquisitions, specifically:

- OpenText acquiring EMC's ECD software division — Documentum, Leap, Captiva and InfoArchive

- Hyland acquiring the Lexmark ECM software products — Perceptive, Brainware, Saperion and Pallas Athena.

Broader content services market dynamics are redistributing spending among other content-related platforms, applications and services; for example, increasing overlap and packaging challenges from outside products — most notably content collaboration platforms. The CSP and CCP markets are increasingly overlapping in terms of use cases and features; while most vendors participate in only one of the markets, their growth rates and revenue are converging:

- SaaS has fueled much of the content services market, mostly within the CCP segment. New CSP installations were often delivered through SaaS, with the legacy CSP installations remaining on-premises.

- Content services sold as stand-alone, on-premises products are a declining portion of the market, because packaging — with other products in a suite, or with digital transformation services — has been the more successful sales approach.

For additional data on the market size and market shares for the content services market, see "Market Share: Content Services, Worldwide, 2017,""Market Share: Enterprise Application Software, Worldwide, 2017," and "Forecast Analysis: Enterprise Application Software, Worldwide, 2Q18 Update."

Acronym Key and Glossary Terms

AI	artificial intelligence
BPM	business process management

CCP	content collaboration platform
CSP	content services platform
CS PaaS	content services platform as a service
GDPR	General Data Protection Regulation
IaaS	infrastructure as a service
LOB	line of business
ML	machine learning
PaaS	platform as a service
SaaS	software as a service

Evidence

Sources for the analysis in this Magic Quadrant include:

- A Gartner vendor and product survey, conducted in April 2018.

- A Gartner survey of vendors' reference customers, conducted in May 2018, for which there were 231 respondents

- Gartner Market Share research

- Gartner Peer Insights vendor reviews

- One-on-one and video briefings with vendors

- Video demonstrations of use cases and usability

- Feedback from discussions with users of Gartner's client inquiry service

- Vendors' responses to questionnaires specific to this market

- Interviews with vendors' customers

- Generally available information, news reports and data in financial and industry publications

- Discussions with Gartner analysts in relevant Gartner research communities

- Gartner managers' critiques

- Reviews by Gartner analysts

- Vendors' factual reviews

Note 1
Microservices

Gartner defines a microservice as:

> **"A tightly scoped, strongly encapsulated, loosely coupled, independently deployable and independently scalable application component."**

Based on a combination of service-oriented architecture (SOA) and domain-driven design (DDD), the microservices architecture (MSA) is a design paradigm with three core objectives:

- Development agility

- Deployment flexibility

- Precise scalability

MSA adoption disrupts traditional application development, data management and operations practices. Today, microservices are being adopted by leading-edge companies and technology vendors to support continuous delivery (CD) strategies. CD enables them to deliver new features into their live production systems many times a day. MSA also enables them to support web-scale traffic volumes (see "Innovation Insight for Microservices").

Note 2
Critical Capabilities and Use Cases for CSPs

Content services platforms (CSPs) are characterized by an array of capabilities that include services and functionality that exploit digital technologies. Although unlimited, Gartner has identified five common use cases for CSPs.

The critical capabilities and use cases for CSPs have been modified from previous years' reports. The 15 critical capabilities for CSPs in 2018 are:

- **Administration.** Controls and options for administration of the CSP including server and endpoint operating systems, general system administration, management dashboards and reporting tools.

- **Analytics and reporting.** Features that enable users to discover insights regarding the content and data stored in the CSP. Such insights can be surfaced in dashboards and structured reports, either provided directly by the supplier or configurable by end users.

- **Business application enablement.** Features that describe how well the CSP supports the wider business application ecosystem via integrations with common line of business (LOB) solutions.

- **Capture.** The ability to digitize information and have it stored in the content repository. The capture of paper-based information via optical character recognition (OCR) is the most traditional aspect, but mobile capture is also particularly important for CSPs.

- **Collaboration.** Collaboration capabilities help users to work jointly on projects, using a common set of documents. They include recommendations, commenting, sharing, co-authoring, markup, tasks and gamification. The "workspace" construct enables a persistent secure space for extended content collaboration.

- **Content management.** Functionality that enables users to work effectively with the content stored in the system by the provision of standard content controls for documents, images and other media. This includes features such as importing, editing, viewing multiformat content, versioning and annotating.

- **Content security.** Controls that relate directly to the protection of content and include access control lists (ACLs), electronic digital rights management (EDRM) protection and data loss prevention (DLP).

- **Delivery model.** How products are deployed, and the effectiveness of the service within which they are deployed. It includes consideration of whether the product is available both on-premises and in the cloud, and what service levels are available in each model.

- **Information governance.** Features that enable an organization to be compliant with regulatory and organizational mandates. It includes certification with international standards and formal controls for long-term content preservation.

- **Metadata and classification.** Metadata and classification defines the features that are used to associate metadata with content in a CSP.

- **Platform.** The platform capability represents the technical architecture of the CSP solution and its integration with the wider organizational IT landscape and strategy.

- **Productivity.** Integrated and intuitive designs offer seamless cross-device access to files, productivity and business applications.

- **Search.** The ability to search for information either directly in the content or by using the metadata associated with the content, and then retrieve a set of results.

- **System security.** How the underlying system is secured. It includes considerations for authentication, identity management, and encryption of commutation and logging of user activity.

- **Workflow and process.** The most basic feature is typically ad hoc task assignment, which can be used in an approval-type process. More advanced features enable authorized users to define flows and UIs (represented as forms) suitable for end users to utilize for any number of business processes.

All CSPs must provide integrated content services natively, or as active third-party technical integrations that support the following five content use cases:

- **Back-office processing.** Focuses on the processing of content and information to support business operations that include invoice processing, purchase to pay, employee onboarding and more. Includes capabilities that enable the content-specific requirements such as capture, data extraction (OCR), structured processing and integration into lead applications.

- **Business process applications.** The ability to configure and define applications that combine process and content through the tight integration of content and business processes. Applications are developed using modelling techniques and can address multiple channels internally or externally, such as B2B or B2C. Case management applications are common, including incident management, or investigation management and service delivery.

- **Document management.** The ability to support document and content management needs across teams, departments and enterprises. Includes integration into common user productivity tools, to enable effective content creation, and categorization and retrieval capabilities to enable users to locate and utilize the content as required.

- **Records management.** Information governance-centric use cases relating to the long-term preservation and protection of digital records within an organization. Includes a secure repository to support records management, regulatory compliance and business continuity.

- **Team productivity.** Supporting individuals and knowledge workers who need access to relevant content in the context of their project or work tasks. Focuses on business teams in content-specific collaborative use cases such as projects, events and other initiatives, with the provision of content sharing, coordination, shared workspaces and social tools.

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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