

# Magic Quadrant for Content Services Platforms

Published: 30 October 2019 ID: G00377256

---

**Analyst(s):** Michael Woodbridge, Marko Sillanpaa, Lane Severson

Content services platforms are key components of the digital workplace and digital business. At a time of increased emphasis on the cloud, ease of use, AI and governance, this report will help those responsible for digital workplace applications find the right vendor for their strategy.

## Strategic Planning Assumptions

By 2022, 20% of organizations will deploy content services evolved from a content collaboration platform (CCP) for digital business requirements, rather than a content services platform (CSP).

By 2022, the current revenue growth rate for the CCP market will decrease from 34%, to match the CSP market's growth rate of 8%.

## Market Definition/Description

The content services platform (CSP) market contains both long-established vendors and relatively new vendors. Both kinds sell products to support the content- and process-related needs of operational business functions. They support a broad range of these functions, ranging from horizontal ones such as HR employee onboarding to industry-specific ones such as insurance claims management. To support this breadth, they need to combine capabilities including robust content and metadata management, process automation, intelligent classification and information governance. Integration with common business applications via configuration is also key.

Buyers' needs for CSP technologies have shifted over the past few years. There is increased focus on three trends that are present across organizations, regardless of industry:

- **Tackling content sprawl:** Organizations have a multitude of content repositories, and with the increasing prevalence of SaaS, more silos materialize on a regular basis. The desire to rationalize this multitude of content sources did not disappear with the death of enterprise content management (ECM). Fortunately, there is an acceptance in the market that new techniques are required to tackle this issue.
- **Delivering digital business transformation:** CSP technology is in demand to underpin new operations and processes that utilize content as a key component in innovative ways. A common requirement is to join up fragmented operations by including partners, suppliers and

customers directly in system processes that include both operational and collaborative experiences. An insurance company might digitize and join up the entire claims processing cycle, for example. Customers can then interact directly with the organization's back office, which, in turn, can collaborate effectively with other partners in the process. The open, yet secure combination of content and processes is an enabler of this kind of transformation.

- **Modernizing work:** Users' expectations have changed for good, due to the ubiquity of compelling user experiences in consumer applications. There is increasing evidence that a workforce with a high degree of digital dexterity is more likely to help an organization realize its digital transformational goals. New modes of interaction with content (for example, synchronous editing in a nondocument format such as Dropbox Paper) are required in order to modernize the work experience.

Buyers' needs require more agile, adaptive solutions, which are very different to the rigid, on-premises and monolithic solutions of old. At the heart of any digital business platform, a modern CSP must display the following characteristics:

- **Cloud scale:** The ability to scale to meet the demands of the workforce. Provision of seamless connectivity to a broad ecosystem of suppliers, partners and customers, while delivering continuous innovation, is essential.
- **Protection:** The provision of deeply embedded, flexible and intelligent information governance, security and privacy controls. This is essential to operate in a world of ever-increasing threats and regulatory demands.
- **Fast time to value:** The ability to deliver business value quickly — for example, through the provision of prebuilt applications and citizen-developer-based tools.
- **User-centricity:** A consumerized user experience with embedded mobility and consistency across devices. A focus on the overall user experience is of paramount importance for driving adoption and realizing the expected benefits of this technology.
- **Intelligence:** Advances in artificial intelligence (AI) techniques, including machine learning (ML) and deep neural networks, have enabled innovations for classification, productivity and automation scenarios. Such capabilities should be embedded in all key areas of the platform, from security to collaboration, to align with the evolving expectations of the market.

Gartner's assessment of the CSP market focuses on the ability to provide solutions for the underlying business needs outlined above. There are several ways in which functionality and features can be implemented to support the characteristics listed above. Gartner assesses how CSP vendors combine these characteristics in effective solutions for organizations looking to transform.

# Magic Quadrant

Figure 1. Magic Quadrant for Content Services Platforms



Source: Gartner (October 2019)

## Vendor Strengths and Cautions

---

### Alfresco

Alfresco is a privately held company with headquarters in Maidenhead, U.K. and Boston, Massachusetts, U.S. Its CSP is the Alfresco Digital Business Platform (DBP), which combines modules for content services, process services and governance. The vendor's key geographic markets are North America, EMEA and Australia. Its key vertical markets are government, financial services, healthcare and manufacturing.

#### Strengths

- Alfresco is a strong platform vendor with an open-source code base, a strong developer framework and a tested approach to integrating cloud-based AI services. These features make it a good choice for organizations looking to quickly develop highly tailored content-based applications.
- Alfresco's loyal and global third-party partner ecosystem has significant experience of implementing, integrating and packaging vertical and horizontal solutions built on its platform. This enables a broad range of options for organizations looking for prebuilt solutions to deliver business value quickly.
- Alfresco has aligned its services closely with Amazon Web Services (AWS), and supplies several features, including quick-start templates and hierarchical storage management, for customers running their Alfresco deployment on AWS. The DBP is cloud-agnostic and Alfresco has customers running it in other cloud platforms.

#### Cautions

- There are limited out-of-the-box prebuilt integrations with line-of-business (LOB) applications, compared with the offerings of Leaders in this Magic Quadrant. Clients must work with Alfresco's partners to connect with Oracle, SAP or ServiceNow.
- Alfresco has no SaaS or platform as a service (PaaS) offering. Customers who want a managed service delivery model must select and work with Alfresco's partners.
- Alfresco's reference customers reported that deploying its platform and integrating with LOB systems is more difficult than expected. Additionally, they stated that it takes longer than expected to derive the desired business value from the solution.

### AODocs

AODocs is a privately held company based in Atlanta, Georgia, U.S. Its offering, also called AODocs, is a full CSP on top of Google Drive, and has additional document management features such as metadata management, workflow and governance. Key geographic markets are North America and Europe, followed by Australia and New Zealand. Key vertical markets are manufacturing, government and life sciences (for which a SaaS-regulated electronic document management system satisfies GxP validation requirements).

## Strengths

- An extensive set of document management, workflow and governance capabilities enables AODocs customers to exploit Google Drive and G Suite content storage and services.
- According to reference customers, AODocs' solution is easy to implement, with lower deployment cycle times than more traditional offerings.
- AODocs is a true SaaS solution, and thus provides clients with a continually evolving platform in the cloud. This benefit, combined with a compelling price, makes AODocs a good choice for small and midsize enterprises looking to standardize on Google's cloud technologies.

## Cautions

- AODocs lacks several standard CSP features, including capture and reporting. (It can, however, perform optical character recognition on images saved to the system separately.) Customers with both paper and electronic documents will need to look to third-party providers to remedy this shortcoming.
- AODocs is a cloud-only offering and relies on Google Drive or G Suite for its underlying content repository. There is no option for on-premises deployment, which makes it unsuitable for organizations needing to host their own solutions or implement a hybrid platform.
- AODocs is a small company with only four offices and fewer than 100 employees. It has a relatively small partner network, which includes a mix of channel and technology partners. Larger customers should check that AODocs and its partners can scale up to meet their requirements, particularly in terms of integration and customization.

## Box

Box is a public company headquartered in Redwood City, California, U.S. Its CSP is a combination of separately licensed components, including Box Enterprise, Governance, Relay and Platform. These components are available in Digital Workplace and Digital Business product suites. Its key geographic markets are North America, EMEA and Japan. Its key vertical markets are financial services, healthcare and life sciences, professional services, retail and consumer goods, and industrial goods and manufacturing.

## Strengths

- The Box Platform is a SaaS-based CSP with a strong software development kit (SDK) and developer toolkit for building custom content services applications. These can be opened to an extended range of participants, including employees, partners and customers outside the firewall. Application development templates enable citizen developers to realize business benefits more quickly.

- Box has strong prebuilt application integration for common productivity and LOB applications, including ones from Microsoft (Office 365), Google (G Suite), Slack, Quip, Oracle, ServiceNow and Salesforce.
- Box is quickly adopted by users within its client base. Reference customers gave high marks for the availability and consistency of Box features across various devices. They praised the platform's simplicity, ease of use, modern UI, and support for team collaboration.

### Cautions

- The Box Platform is a cloud-only CSP. It does not support on-premises deployment and is therefore unsuitable for customers requiring on-premises or hybrid deployments.
- Several key CSP capabilities are limited, including search, records management and workflow. The Box Relay workflow product currently does not support complex business process management or case management, and works only with the Box repository.
- Box provides data residency capabilities to host content in different geographies, but these capabilities are limited to content only. Metadata stored in Box, along with the rest of the control plane, is stored in Box's U.S. data centers. As metadata and classification capabilities grow within the platform, this could become a concern for international organizations with strict regulatory requirements concerning data location. Box defines Binding Corporate Rules to attempt to address the concerns of organizations with data relating to EU citizens.

### DocuWare

DocuWare is a private company that was recently acquired by Ricoh. It is headquartered in Germering, Germany. Its CSP offerings are DocuWare (on-premises software) and DocuWare Cloud (SaaS). DocuWare's key geographic markets are Europe and North America. Its product is focused on horizontal back-office processes and therefore has broad applicability across industries. Its biggest vertical market in terms of customers is manufacturing, which is followed by finance, government and education.

### Strengths

- DocuWare is well suited to small and midsize clients. Its pricing focuses on such customers, and DocuWare has large, well-developed, localized partner networks in North America and Western Europe.
- DocuWare's prebuilt workflow components for standard business processes, such as invoice processing, enable organizations to quickly digitize paper-based processes.
- DocuWare has long used a SaaS delivery model. Its SaaS and on-premises products have feature-parity, so customers can deploy either without sacrificing capabilities.

## Cautions

- Integration with leading enterprise LOB platforms is limited, especially compared with competitors that focus on larger enterprises. Beyond simple data capture integrations (supported by DocuWare's Smart Connect feature), deep integrations require custom efforts utilizing DocuWare APIs.
- Given its focus on midsize customers, DocuWare has limited presence within, and experience of, large-scale customers, and limited experience of complex use cases. Its average deployment size is small (less than 100 users), compared with large-scale deployments that may manage thousands of users and billions of documents.
- DocuWare's mobile capabilities are limited, compared with those of leading CSP vendors. Mobile native apps are available for iOS and Android, but these are limited to basic functions, namely document access, capture and workflow. No development framework is available to tailor these apps. Access to other DocuWare functions is available via the standard browser client, which can be used effectively on tablet devices.

## Everteam

Everteam is a private company headquartered in Lyon, France. Its CSP is called EverSuite. Everteam's primary geographic market is EMEA, where it has a strong presence, particularly in France and the Middle East. Its key vertical markets are financial services, energy, manufacturing and government

## Strengths

- Everteam has very good capabilities for archiving, policy management and information discovery. As a result, its platform ingests large volumes of information from other repositories and enables users to interrogate that data to deliver insights as required.
- Compared with other CSP providers, Everteam is especially strong in the Middle East, where it has an established network of experienced in-country system implementers.
- Reference customers for Everteam reported being very satisfied with their implementations and scored the vendor's technical support highly. They also said that implementations were good value for money.

## Cautions

- The user experience of Everteam's platform is fragmented because the CSP modules that handle different tasks are entirely separate applications. Also, the applications use highly technical concepts that casual users will struggle to grasp without significant training.
- There are no SaaS or PaaS versions of EverSuite's CSP. Cloud deployment is available only via third parties, so potential customers should carefully evaluate both the product and the hosting cloud partner.

- Support for Everteam's platform and access to skilled resources outside EMEA is limited, compared with international Leaders in this market. Sales and support in North America are mostly handled directly by a relatively small Everteam operation, but the company's partner channel is growing to support its expansion plans.

## Hyland

Hyland is a privately held company based in Westlake, Ohio, U.S. It also has offices elsewhere in North America, and in South America, Europe and Asia/Pacific. Its primary CSP is OnBase, which is augmented by complementary Hyland products; the separate Perceptive Content platform (acquired from Lexmark in 2017) offers similar capabilities. The vendor's primary geographic market is North America, but it also has a growing presence in South America and Europe. Key vertical markets are healthcare, higher education, financial services, insurance, government and manufacturing.

### Strengths

- Hyland has dedicated business units for healthcare, higher education and government, and insurance and financial services, focusing on all aspects of the customer journey from sales to solution implementation. Hyland's platform integrates tightly with key vertical products, such as those of Epic in the healthcare sector and Guidewire in insurance.
- Hyland's product offerings now include intelligent data capture, document generation and content collaboration, which extend its capabilities beyond those of most of its competitors. Hyland's Brainware capture engine represents an early adopter of ML in place of the conventional approach of template-driven zonal recognition.
- Hyland maintains a very high level of employee satisfaction. It has appeared in Fortune's 100 Best Companies to Work For list for six years. Its low employee turnover results in employees having a deep understanding of its product and long-standing customer relationships.

### Cautions

- Hyland lacks REST-based APIs. Access to APIs and API documentation requires prior training and certification. These factors make certain custom integrations by organizations difficult. However, Hyland plans to release selected REST APIs in December 2019.
- Hyland has not been as quick as other competitors in this market to launch a true SaaS/PaaS option for OnBase. Hyland released OnBase Foundation in 2019, which provides an increased frequency of product releases and will serve as the basis for a new Hyland SaaS platform (a future roadmap item). Customers looking to host in the cloud are therefore limited to application managed service options available from Hyland or self-hosting using infrastructure as a service (IaaS).
- Although Hyland has offices in EMEA, its presence there is limited. Potential customers should check whether they will have access to required implementation expertise in this region. Hyland is most visible in the Americas — it has a strong presence in the U.S. and a growing presence in the Caribbean and South America.



## IBM

IBM is a public company headquartered in Armonk, New York, U.S. It has a large international presence and a global installed base for its CSP offerings. Its primary CSP is the IBM Automation Platform for Digital Business, which combines several IBM products and uses FileNet as its primary content-related technology. IBM's primary CSP markets are North America and Europe, followed by Australia and New Zealand. Its key vertical markets are financial services, government, insurance and hi-tech.

### Strengths

- IBM's primary CSP has one of the strongest sets of capabilities on the market, and excels at content management, process management, analytics, capture and information governance. The complete platform includes integrations with other IBM products for functions such as ML, automation and rules management.
- Customers can choose from several deployment options. IBM offers its primary CSP as SaaS and in an IBM-supplied private cloud. Customers can opt to manage their own containerized versions of all software components either on-premises or using IaaS.
- IBM has a global presence and an extensive footprint of large-scale enterprise deployments. A large partner network provides significant expertise for implementing and enhancing its primary platform. This network includes partners with their own solutions that provide clients with wider choice and availability of product-level expertise.

### Cautions

- Migration from older versions of IBM's CSP products (including FileNet and Content Manager), especially heavily customized ones, is cumbersome and confusing, according to some reference customers. Customers are often unaware of the options available to modernize legacy deployments.
- IBM content services projects are often complex and costly because of the number of features and modules that make up the full extent of IBM's content services capabilities. This was a recurrent concern of reference customers surveyed for this Magic Quadrant.
- AI capabilities for content services, such as classification, metadata extraction and sentiment analysis, are quite closely bound to IBM's Watson AI platform. Although there is a benefit to this in terms of minimizing integration and testing costs, it also represents a limitation for customers seeking flexibility. IBM customers that need or want AI frameworks from other vendors — for example, to support business-domain-specific use cases — must build interfaces themselves.

## iManage

iManage is a private company headquartered in Chicago, Illinois, U.S. Its CSP offering is iManage Work Product Management. iManage's primary geographic markets are North America, Europe and Asia/Pacific. Its primary vertical market is the legal sector, but it also has a presence in professional

services. iManage is also starting to extend its applicability to other vertical markets that require high levels of security, such as financial services.

## Strengths

- iManage has strong integrations with Microsoft Outlook and Google Gmail — emails and attachments are managed directly within the iManage repository. For organizations in which document authoring is the reason for a business process (such as with contract management and RFP responses), the value of controlled, audited email collaboration is often high.
- iManage relies on a policy security model, rather than the more common access control list model. Policy-based security uses metadata tags to define which objects a user can or cannot access. This approach is easier to administer than standard access control list management, particularly when highly varied access control is required.
- iManage has robust document management capability, especially for records management, for which there are a range of functions beyond record disposal (the most common “basic” feature). These functions include controls for when a document is out for public review and alerts about when to delete prior versions. Organizations wanting to consider other aspects of documents’ life cycle between publication and retention may find these features advantageous.

## Cautions

- iManage’s document management capabilities and overall user experience derive from its tight focus on the needs of its primary market, the legal sector. Some advanced functions, like those of its RAVN AI platform, also focus on the legal market. Organizations looking to use the product outside their legal department or the legal sector should ensure that it fully meets their requirements.
- Compared with more general CSP platforms, iManage’s CSP is priced at a premium that reflects its focus on providing application functionality for the legal sector. Organizations looking for a more general platform on which to build content applications may find its price relatively high.
- iManage’s CSP has limited workflow capabilities, so customers may need to rely on a third-party product for these. Workflow capabilities exist for managing legal industry processes such as business intake and conflict management, but these are loosely integrated with the rest of the product and highly specialized.

## Laserfiche

Laserfiche is a privately held company with headquarters in Long Beach, California, U.S. Its CSP, also called Laserfiche, is available in the cloud both as multitenant SaaS and as an offering hosted by Laserfiche or its partners. The CSP is also available on-premises. It is sold and implemented predominantly via a large ecosystem of partners. Laserfiche’s primary geographic markets are the Americas and Asia/Pacific, and the company has a small but growing presence in EMEA. Its key vertical markets are government, financial services, education, manufacturing and healthcare.

## Strengths

- Laserfiche offers best-in-industry support for clients in the government and education sectors in North America. It has hundreds of prebuilt applications on its platform, an extensive number of resellers and certified implementation partners with industry experience. There is also a strong peer community.
- Laserfiche has strong records management and governance capabilities supported by comprehensive metadata functionality. These governance services can be extended to external content repositories through its federation capabilities.
- Laserfiche provides a flexible process design tool that enables citizen developers to capture data from LOB applications and trigger processes within its CSP. Process automation and content application composition are accomplished with the help of a user-friendly visual workflow and form designer tools.

## Cautions

- Most global support for Laserfiche is managed by its partners, though support for large customers is handled by Laserfiche directly. Many prospective clients will therefore need to evaluate the capabilities of Laserfiche's partners, not just of Laserfiche. Even so, reference customers for Laserfiche had high praise for the support they received from Laserfiche, both directly and via its partners.
- Laserfiche lags behind the Leaders in this market in terms of vision and capabilities for integrating third-party AI and ML capabilities. Clients who want to take advantage of broader AI/ML services will have to develop their own models for integration using Laserfiche's object-based integration framework.
- Laserfiche lacks Microsoft Office 365 web integration for its multitenant SaaS cloud offering, although this is planned for delivery in 2019. Additionally, other areas of Office 365 integration are currently missing. SharePoint Online integration is planned for late 2019, however, and Microsoft Teams integration is scheduled for 2021. Integration with Office 365 web apps has been available in Laserfiche's on-premises platform since 2017.

## M-Files

M-Files is a private company headquartered in Tampere, Finland and Plano, Texas, U.S. Its CSP is called M-Files Online. M-Files' primary geographic market for this product is Europe (especially the Nordic region), which is followed by North America, Australia and New Zealand. Key vertical markets are manufacturing, financial services, oil and gas, professional services, and architecture, engineering and construction, but the platform is suitable for all industries.

## Strengths

- M-Files Online displays content and related data artefacts in a single view. This enables users to navigate quickly between content and related business data objects, such as those relating to customers and sales opportunities, in a consistent way.
- M-Files' Intelligent Metadata Layer (IML) federation feature enables customers to consolidate a multivendor content ecosystem without having to migrate content to a single system. IML combines this federation capability with intelligence services for classifying and managing distributed content.
- M-Files continues to mature its cloud service — it now offers a SaaS version and a new subscription-based flexible licensing model (M-Files Online). Within the same commercial agreement, customers can utilize both cloud and privately managed (for example, on-premises) environments.

## Cautions

- M-Files' CSP has architectural constraints (such as limits on the number of documents in a vault) that are not present in many competitors' products. This potentially limits scalability and high availability in large deployments (some reference customers expressed concerns about scalability and high availability). M-Files is modernizing its platform's underlying components, such as the relational DBMS layer, to address this issue.
- Although growing, M-Files remains a relatively small company of approximately 500 people. As a result, compared with larger rivals, there is less availability of technical expertise. This is particularly true in the U.S., where its partner ecosystem is less well developed than in Europe.
- The M-Files user experience can be complex for relatively casual users. Object relationship linking is powerful and differentiated from the competition, but the navigation experience was often described as complex by reference customers with simple needs. Search and metadata-driven views provide alternative approaches to finding and working with content and data.

## Micro Focus

Micro Focus is a public company based in Newbury, U.K. Its CSP is the Micro Focus Content Manager. Micro Focus operates across EMEA, Asia/Pacific and the Americas. Key vertical markets are government, regulated industries such as life sciences and financial services, oil and gas, and manufacturing.

## Strengths

- Micro Focus' platform has strong archival and records management capabilities, including jurisdictions (a way to manage retention policy time periods based on a variable) and physical records management. In-place records management capabilities are also available for a range of repositories including Microsoft SharePoint, OpenText Documentum and IBM FileNet.

- Micro Focus provides a strong set of tools for file analytics, which, coupled with its records management capability, gives it strong archiving capabilities. Organizations focused on the archiving of content will find these capabilities advantageous.
- Micro Focus Content Manager has a significant installed base and strong sales support presence in Australia and New Zealand. Good levels of implementation expertise are also available in these markets. Micro Focus also has a presence in EMEA, Asia/Pacific and the Americas.

### Cautions

- Micro Focus Content Manager has a limited set of integrations with LOB applications. An SAP integration is available, but there is no integration with other common platforms, such as those of Oracle, Salesforce and Microsoft (Dynamics). Clients wishing to integrate with such applications will need to develop their own using the Content Manager API or look for third-party solutions.
- Micro Focus lags behind its rivals in terms of implementing a modern CSP vision. There is no native cloud offering, and the user experience is dated and in need of modernization. Content Manager is primarily a platform for data life cycle management, information governance and archiving. Application managed service hosting is available from third parties.
- Reference customers for Micro Focus mentioned difficulties working with and connecting to sales, support and professional services. Some said they have had success working with partners instead.

### Microsoft

Microsoft is a public company headquartered in Redmond, Washington, U.S. Its CSP is Office 365 E3/E5 and SharePoint Server 2019. Within Office 365, SharePoint is the component that provides the majority of CSP functionality. Other components, such as Flow, Teams and One Drive, provide complementary services. Office 365 is used in nearly all geographic and vertical markets.

### Strengths

- Microsoft Office 365 features a comprehensive set of services encompassing individual productivity, team collaboration, content management, process automation and document workflow.
- A unified cloud-based platform includes effective AI capabilities for content insight and process automation. Organizations can take advantage of the graph capabilities in Office 365 to help surface useful information before users search for it. Additionally, Microsoft Flow provides a host of prebuilt workflows within the Office 365 environment and works with external applications and services from providers such as Google (Gmail) and Salesforce.
- An extensive and rich ecosystem of third-party software and independent software vendor partners augments the platform's own capabilities. Although every CSP provider has software

partners, Microsoft stands out because its partners provide augmentation tools for a huge range of content services use cases. These partners include K2 and Nintex for workflow, and RecordPoint, AvePoint and Gimmal for improving Office 365's records management capabilities.

## Cautions

- Microsoft's CSP requires add-ons or third-party tools to meet complex requirements in areas such as information capture, records management and workflow. Additionally, reference customers referred to the complexity of implementing business solutions for rich external collaboration scenarios.
- In-depth solutions for industries like financial services, government and healthcare are entirely the work of Microsoft's extended partner ecosystem. Potential customers will need to evaluate these offerings in addition to the underlying platform, or build their own solutions.
- Microsoft's CSP has no federation capability. Content must be migrated into Office 365 in order to utilize the functional and governance services it provides. Customers must therefore embark on a consolidation and migration exercise or invest in a third-party product to manage content outside Office 365.

## NetDocuments

NetDocuments is a private company based in Lehi, Utah, U.S. Its CSP is also called NetDocuments, and its primary geographic markets are North America, Europe and Asia/Pacific. Key vertical markets are services-oriented: legal, professional services and financial services. NetDocuments is also beginning to focus on industries outside these domains, including financial services, healthcare and real estate

## Strengths

- NetDocuments prioritizes advanced document management capabilities, especially for legal documents. This includes management of compound documents. Organizations in sectors for which document generation is a primary function (such as the legal services industry) and that reuse content components (such as clauses in legal contracts) will find this advantageous.
- NetDocuments is a cloud-native platform with a true SaaS delivery model. This means there is only one product line to maintain, and avoids the feature disparity sometimes associated with vendors that maintain both cloud and on-premises versions. Reference customers expressed high levels of satisfaction with NetDocuments as a SaaS provider for legal documents.
- NetDocuments has robust integrations with Microsoft Office 365 and especially with Microsoft Outlook. It manages emails within its repository, and provides attachments from its repository. Organizations needing to manage email conversations about content alongside that content will find this advantageous.

## Cautions

- NetDocuments is a solution focused on legal document management, and this is evident from its user experience, common use of legal terminology and market share. It has limited adoption beyond corporate legal departments and law firms. Organizations looking for a solution for other sectors should favor other vendors.
- NetDocuments' UI is available only in English, and the system lacks support for double-byte characters. Organizations for which English is not the primary business language will find this a significant restriction.
- NetDocuments' platform has limited customer extensibility, compared to those of the Leaders in this market. Only data model configuration capabilities and the ability to embed external services capabilities in the UI are available as configurable options. It also lacks workflow capabilities for extensibility, for which it relies on third parties.

## Newgen

Newgen is a public company headquartered in New Delhi, India. Its CSP is the Newgen OmniDocs Enterprise Content Management (ECM) Suite. Its primary geographic market is Asia/Pacific, especially India, and it also has a strong presence in the Middle East and Africa. It has a small but growing presence in the U.S. and Europe. Key vertical markets are financial services, government and insurance and, to a lesser degree, healthcare, telecommunications and manufacturing.

## Strengths

- Newgen has a range of capable solutions tailored to certain industries and to horizontal use cases across its key vertical markets. Coupled with project templates and consulting expertise, these solutions enable customers to realize business value quickly.
- The application development experience is mature, thanks to an extensive set of tools. Tasks such as configuring content-centric applications, form processes and mobile experiences can be performed without having to write code. Several solutions within Newgen's suite focus on enabling citizen-developed use cases.
- Newgen has flexible licensing and deployment options, including software only, full SaaS and private cloud application managed service. The vendor tailors its licensing to clients' requirements through perpetual, subscription and value-based pricing (that is, pricing associated with business value metrics or outcomes).

## Cautions

- The user experience across the various elements of the Newgen suite is inconsistent. This can make solutions which require multiple components appear disjointed. Recent additions to the product line, such as the Corrus collaboration platform, are modern-looking and intuitive, but the business process management UI is especially complex and dated.

- Newgen's global presence is very limited. Its primary customer base is in India, the Middle East and Africa. It aspires to grow in the U.S. and Western Europe primarily through partners. Prospective clients in the U.S. and Western Europe need to evaluate the ability of Newgen's partners to meet their requirements.
- Newgen's annual investment in R&D is proportionally lower than that of many of its competitors, and the disjointed user experience reflects this. However, Newgen has kept pace with its rivals in terms of content services innovation.

## Nuxeo

Nuxeo is a private company headquartered in Brooklyn, New York, U.S. Its CSP is the Nuxeo Content Platform. Nuxeo's target geographical markets are North America and Western Europe. Its key vertical markets are financial services and consumer product manufacturing, followed by government, retail, media/entertainment and hi-tech.

### Strengths

- Nuxeo's platform has a modern, flexible architecture that includes federation capabilities to draw in content from other sources. Customers have the option to choose their underlying data management technologies (including SQL and NoSQL). The scalable architecture serves large deployments, potentially up to billions of documents, for both content storage and content processing.
- Reference customers had high praise for Nuxeo's user experience, especially its modern look and feel and simplicity.
- Reference customers scored the platform's configurability options highly, mostly due to the extensive range of capabilities available. A centralized design tool, Nuxeo Studio, covers all product extension points, and there is an extensive range of product APIs.

### Cautions

- Nuxeo has a limited set of native features for some of the more established content services capabilities, such as capture and records management. Prospective customers that need these should check whether Nuxeo's native capabilities are sufficient or whether third-party integrations will be required.
- Nuxeo-branded vertical applications for its platform are currently limited to case management for governance and digital asset management for uses case associated with managing brand-related artefacts. Customers should expect to have to tailor the platform to support other use cases.
- Nuxeo's limited, though expanding, partner base means that customers must rely heavily on Nuxeo's professional services. Reference customers reported that these services are overburdened.



## Objective

Objective is a public company based in Sydney, Australia. Its CSP is Objective ECM. Objective's primary geographic markets are Australia, New Zealand and Europe, followed by North America. Its key vertical markets are government and heavily regulated industries.

### Strengths

- Objective's product is a robust document management platform that includes support for both content collaboration and file analytics. It has strong records management capabilities, including in-place records management.
- Customers can use Objective ECM's governance, workflow and complex document creation modules with other content repositories, such as those of Microsoft SharePoint and Micro Focus Content Manager. Organizations that require stronger records management capability, drawing on other platforms that they already have, may find it advantageous to combine such platforms with Objective ECM.
- Reference customers were highly satisfied with Objective's product and strongly valued its customer relationship management.

### Cautions

- Objective's CSP is narrowly targeted at government and public sector customers in its primary geographic markets. Deep integrations with common LOB applications, such as those of SAP, Salesforce, and Oracle, are not available. Organizations can configure integrations using available integration frameworks (such as Microsoft Flow) or develop their own using the CSP's APIs.
- Objective's UI is available only in English and the system lacks support for double-byte characters. Organizations for which the primary business language is not English will find this restrictive.
- Objective's repository module is not available as SaaS, which limits options for clients wishing to move to the public cloud. It is available as a cloud-hosted application managed service. Five of its modules (Perform, Trapeze, Keystone, Redact and Connect) are available as SaaS and can be connected to other Objective instances or to repositories from other vendors (such as Micro Focus Content Manager).

## OpenText

OpenText is a public company based in Waterloo, Ontario, Canada. Its CSP products are the OpenText Extended ECM Platform (which includes the Content Suite Platform) and Documentum. Its primary geographic markets are North America, EMEA and Asia/Pacific, specifically Australia and New Zealand. Key vertical markets have high regulatory demands: the financial services, government, life sciences, legal, and energy and utilities sectors, for example.

## Strengths

- The OpenText Extended ECM Platform has out-of-the-box options for deep integration with LOB systems, especially those of SAP, but also those of Salesforce, Oracle (E-Business Suite) and SAP SuccessFactors. These integrations offer a user experience rich in functionality and are embedded directly into LOB applications and the OpenText application.
- OpenText has an extensive and experienced partner ecosystem, including integrators, technical partners, resellers and ecosystem partners (such as SAP, Microsoft, Salesforce and AWS). This gives users options beyond OpenText's professional services, which are typically premium-priced.
- OpenText continues to expand its SaaS/PaaS presence. OpenText Core Share is available for collaboration, and the OpenText OT2 platform is closing the feature gap with the vendor's more established CSPs. This gives clients additional cloud-based options beyond the more longstanding offerings traditionally associated with OpenText.

## Cautions

- OpenText has a broad but often overlapping CSP portfolio, including the Extended ECM Platform and Documentum. The Extended ECM Platform appears to have the most strategic focus. Customers evaluating OpenText products as new purchases should scrutinize the respective offerings' strengths and roadmaps. This will help them determine which product will meet their long-term needs.
- Reference customers expressed frustration when it comes to negotiating with OpenText — a complaint backed up by our interactions with Gartner clients. This applies to both new implementations and renewals or extensions of existing contracts (including maintenance renewals and product upgrades). OpenText is the subject of more inquiries from Gartner clients about license audits than any other CSP vendor.
- Reference customers frequently described OpenText projects as complex and time-consuming, primarily due to the extensive range of functionality available in the platform.

## SER

SER is a privately held company with headquarters in Bonn, Germany. Its CSP is the Doxis4 iECM Suite — Content Service Bus. SER's primary geographic market is Europe, but it also has a growing presence in Asia/Pacific and North America. Its key vertical markets are manufacturing, insurance, financial services and government.

## Strengths

- SER's platform has a strong combination of rich content services, federation and native AI. Doxis4 surfaces content and data from multiple sources, such as other content management systems and popular LOB systems, to support business processes.

- SER has several well-crafted out-of-the-box vertical solutions, including for the banking and energy sectors. It also has horizontal solutions, such as for complaint management and invoice processing. These applications have rich integrations with productivity tools such as Microsoft Outlook and with financial solutions such as those of SAP.
- SER provides clients with multiple deployment options for Doxis4: on-premises, public cloud and SaaS. SER has taken care to provide parity of features across the deployment options available to clients.

### Cautions

- SER has traditionally focused narrowly on the European market. However, the additional capital raised its recent acquisition by the Carlyle Group positions it for expansion into other markets.
- The federation capability of SER's platform is limited to search and archiving only. It does not provide a way for users to fully utilize content stored in other repositories — a feature that is becoming more common among rivals' products.
- Doxis4's UI and collaborative capabilities are dated in many respects. The user experience lags behind those offered by market leaders.

### 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

- **AODocs:** This vendor appears in this year's Magic Quadrant because its market share has continued to grow. It provides a solution that is well aligned with Gartner's vision of the continued evolution of the market and the importance of SaaS/PaaS.
- **iManage:** This vendor appears in this year's Magic Quadrant because of evidence of its applicability beyond a single market (the legal sector).
- **NetDocuments:** This vendor appears in this year's Magic Quadrant because of evidence of its applicability beyond a single market (the legal sector).

#### Dropped

- **GRM Information Management:** Due to the selloff of its Chinese organization, this vendor did not meet the geographic inclusion criterion for this Magic Quadrant, which required vendors to have an established customer base and localized support (provided directly or via partners) in at least two major regions (as defined in the inclusion criteria). GRM remains a strong vendor with a rich SaaS offering in both North America and Latin America.

- **Fabasoft:** This vendor did not meet the 2019 inclusion criteria for revenue and growth with its CSP product line. Fabasoft has a significant customer presence in Europe with an information governance-centric solution that is available as SaaS. It also has a worldwide presence in the insight engine segment with its Mindbreeze product portfolio.
- **Oracle:** This vendor is redeveloping its strategy for the CSP market. Its focus is the Content and Experience Cloud, a product primarily aimed at B2C use cases and most typically associated with web content management technology. Oracle is not actively promoting WebCenter Content, its on-premises CSP, to new clients. As such, it does not have a strategic CSP product to bring to market. Oracle therefore, did not meet the geographic inclusion criterion that required vendors to market their products in at least two major regions (as defined in the inclusion criteria).

## Inclusion and Exclusion Criteria

This Magic Quadrant assesses 18 vendors, all of which met the following inclusion criteria (the main change from 2018 is the direct specification of minimal functional capabilities):

- **Offering:** The vendor had to have a generally available CSP offering for enterprise use, which must be available as a separately billed, stand-alone product. The product had to be generally available before 1 May 2019.
- **Revenue:** The vendor must have had at least US\$20 million in total revenue derived from CSP sales in 2018 *or* have a demonstrated revenue growth rate of 40% from 2017 to 2018. Total CSP revenue includes revenue generated from sales of CSP software/services, maintenance and support services. Total CSP revenue is aligned with sales of:
  - **Licenses:** Rights to use the software, based on contract type (perpetual or term license)
  - **Cloud-based services:** Revenue from cloud services, including IaaS, PaaS and SaaS
  - **Subscriptions:** Annual fees for licensed, on-premises software, as well as license revenue from single-tenant managed services (such as hosting)
  - **Technical support and maintenance fees:** Contract fees for support services (excluding training), new versions, updates and upgrades
- **Total users:** There had to be at least 200,000 active, paid users among all the organizations licensed to use the product(s).
- **Installed base:** The installed base as of 1 April 2018 had to meet the following criterion:
  - The total number of customer organizations had to be higher than 500.
- **Geography:** The vendor had to actively market its products, have an established customer base and localized support (provided directly or via partners) in at least two major regions. At least 10% of the vendor's customer base had to be billed in a geography outside its primary territory. The geographies were:

- North America
- Europe
- Middle East and Africa
- Asia/Pacific
- Latin America
- **Minimum functionality:** The vendor's platform had to support a basic level of functionality via native capabilities for the following (unless otherwise specified) as a minimum:
  - Administration:
    - Unified administration console
  - Analytics and reporting:
    - Ability to extract reports to an external reporting application
    - Business application enablement
  - Capture:
    - Provision of native services, or integration with a supported third party, to provide:
      - Zonal optical character recognition (OCR)/intelligent character recognition (ICR)
      - Form recognition
      - Bar code recognition
  - Collaboration:
    - Ability to share content with individual users and groups
    - Ability to collate content into some form of workspace to which other participants can be invited
    - Ability to annotate and comment on content in a PDF format (as a minimum)
  - Content management:
    - Versioning
    - Silent check-in/check-out
    - Grouping of documents based on folder, metadata or sets
  - Content security:
    - Access control for individual content items
  - Delivery model:

- Ability to deploy the solution in a cloud
- Information governance:
  - Retention and disposition management with legal holds
- Productivity:
  - Multichannel access (desktop, web and mobile)
  - Integration with Microsoft Office (direct saving from Word)
- Search:
  - Metadata and full-text search
  - Search results that are restricted by the enforcement of content permissions
- System security:
  - Lightweight Directory Access Protocol (LDAP) support
  - SAML support
  - Repository encryption
  - Audit trail
- Workflow:
  - Multistep workflows
  - Electronic signatures (natively or via supported integration)

## Honorable Mentions

---

- **EISOO** is a CSP vendor with a presence in Asia/Pacific, primarily China. It is expanding into other territories, thanks to a global strategic partnership with Huawei. Its product has evolved from a CCP to include many features that are also important to the CSP market. Enterprise customers in Asia/Pacific should include EISOO on their CSP shortlist. EISOO did not meet this Magic Quadrant's requirements for geographical presence.
- **Easy Software** is a CSP vendor based in Germany that also has a presence in the U.K., North America, Austria, Turkey and Singapore. Its offering originated in the archiving sector, but also provides capabilities for processes such as procure to pay and HR. A deep integration with SAP software is available, as is integration with other ERP solutions, such as Microsoft Dynamics. The recent acquisition of apiOmat (an integration API service and multiexperience development platform) has the potential to align Easy Software better with the evolution of the CSP market. Easy Software did not meet this Magic Quadrant's requirements for geographical presence.
- **ASG's** Mobius Content Services platform provides a range of content services that support information governance, content-driven workflows and archiving use cases. Its primary market is in North America, but it also has a presence in EMEA and Asia/Pacific. It lacks the native

document management and collaboration capabilities required for inclusion in this Magic Quadrant. Integrations with vendors that provide these capabilities (such as Microsoft, with SharePoint) are available from ASG.

## Evaluation Criteria

### Ability to Execute

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.

Table 1 shows the Ability to Execute evaluation criteria and weightings for this Magic Quadrant.

**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 2019)

Gartner uses several data points to assess Ability to Execute in the CSP market. They include data points arising from:

- Assessments and comparisons of the included vendors' capabilities, captured in a survey (similar to that for which we provide a template in "Toolkit: Sample RFP for Content Services Platforms and Content Collaboration Platforms") and evaluated using Gartner's Critical Capabilities methodology (for which, see "Critical Capabilities for Content Services Platforms").
- Assessment of vendors' financial viability using a standard Gartner methodology that does not necessarily equate size with financial stability.

- Information from vendors about their installed bases, services and operations.
- Analysis of customer feedback (via surveys of reference customers and other sources) regarding capabilities, performance, implementation, support, migration and general product satisfaction.
- Ongoing analysis, based on Gartner's interactions with clients.

Scores derived from these and other data sources are distributed among the evaluation criteria listed in Table 1. The weightings of these criteria have not changed from 2018. However, the individual data sources that attribute to them have changed in line with the market's evolution.

## Completeness of Vision

Gartner assesses vendors for their understanding of how market forces can be exploited to create value for customers and opportunities for themselves. As part of this assessment, Gartner evaluated vendors' ability to support business needs by means of characteristics applicable to modern CSPs. They could manifest these characteristics in different ways, such as through product features, deployment methods, professional services and partner solutions.

The capabilities, roadmaps and strategies that vendors outlined to support these characteristics were factored into their overall scores for Completeness of Vision. For this evaluation we used the same data sources described in the Ability to Execute section above.

Table 2 shows the Completeness of Vision criteria and weightings for this Magic Quadrant. Less emphasis is placed on marketing strategy and sales strategy than in the previous Magic Quadrant. This is a relatively mature market, but one that needs to evolve to meet new challenges. Gartner determined that messaging related to marketing and sales strategy is now of less importance than offering (product) strategy and innovation.

**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 2019)



## Quadrant Descriptions

---

### Leaders

Leaders in this market articulate the strongest vision and have access to a distribution channel that can fulfill it. They have significant market presence, strong partner channels, presence in multiple regions, consistent financial performance, broad platform applicability and international customer support. They also deliver suites of technologies that address the demand for direct delivery of most of the 15 critical capabilities of a CSP (described in “Critical Capabilities for Content Services Platforms”). They deliver these either directly or via well-integrated partnerships. All these factors support their strong Ability to Execute. Their strong position for Completeness of Vision is supported by an ability to support digital transformations and modernization work, which requires broad, viable solutions and ambitious, well-developed roadmaps.

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 the market’s direction. This is apparent in areas of innovation where they have been slower to progress than Leaders, such as AI, modern user experiences and cloud presence. Additionally, Challengers may lack presence in certain industries or geographies, and may be unable to differentiate their offerings as clearly as Leaders. There may also be gaps in their roadmaps.

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. They typically have broad applicability across several industries and geographies. However, they have limitations in terms of scale, which constrains their Ability to Execute. They are generally fairly small organizations with distribution channels, market shares and partner networks that are more limited than those of Leaders and Challengers.

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.

## Niche Players

Niche Players have limitations in terms of both Ability to Execute and Completeness of Vision, in comparison with Leaders. This makes them more suited to niche projects, such as industry-specific and departmental deployments. Niche Players characteristically focus on a particular 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). They have significant market presence, compared with vendors not included in the Magic Quadrant.

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

Having evolved from the long-standing ECM market, the CSP market is relatively mature. Differentiation purely in terms of features and functions can therefore be hard for vendors to achieve. However, this market *is* modernizing. Content plays such an important role in digital transformation initiatives that clients require agile, adaptive platforms. Gartner's interactions with clients looking to purchase CSPs indicate specific demands for:

- A highly integrated and consumerized user experience with consistency across all devices
- The ability to derive value from investments in CSPs more quickly
- Cloud modes of delivery, with innovations being delivered quickly and frequently, even where hybrid deployment models are used
- Intelligence and automation embedded into all functions, from productivity capabilities to security controls
- Transparent and robust information governance and security, along with tools to manage these areas cost-effectively

Vendors have responded to these demands by adding new services and capabilities to their products. Their communication of these additions can be confusing, however, as common terms are used to mean different things, "AI" and "cloud" being notable examples. Customers should be aware of the developing capabilities of vendors in the following areas, and should check how these are implemented to ensure suitability for their technology strategy:

- **User experience:** Over the past few years, most vendors have considerably updated the user experiences they provide, with many now delivering compelling, modern experiences across a range of devices. But it is important to evaluate how far these developments spread through their entire product stack. Vendors with large application portfolios have not deployed user experience improvements consistently across all their products, so the user experience can sometimes be inconsistent.

- **Time to value:** A major factor in any CSP purchasing decision must be how quickly the customer can derive business value from a solution. Vendors can shorten the “time to value” in a variety of ways. The quickest is to provide prebuilt applications, thus enabling immediate deployment and usage for given business scenarios. Low-code/no-code configuration tools provide further options for extending these applications or building entirely custom solutions without having to revert to more complex development methods. Beyond these approaches, the API layer is important, as is the ability of the customer’s in-house IT unit to utilize this effectively alongside the existing application ecosystem. Vendors’ offerings range from those that provide native APIs, to those that offer microservices-based REST APIs, and those that supply well-rounded developer SDKs.
- **Cloud delivery models:** Most CSP vendors now provide and promote SaaS platforms, with continuous innovation built into their delivery cycles. However, there are still many application managed services masquerading as SaaS, which can slow innovation and complicate product upgrades.
- **AI:** Almost all CSP vendors now provide some form of AI within their platforms, but they do so in different ways. Prospective customers need to qualify which of the following approaches best suits their requirements:
  - **Native embedded ML capability.** This approach enables quick implementation, and imposes no additional costs, but is usually limited to a given set of use cases.
  - **Framework for ML.** This approach offers a framework that enables the client to integrate with, and configure the output from, external ML engines. This method can be much more flexible, but imposes additional costs for implementation and ongoing usage.
  - **Hybrid of the above.**
- **Security and governance:** CSP vendors have long focused on providing fine-grained security control, but this has often been complex to manage and difficult for business users to understand. Increasingly, therefore, vendors are now using AI to automate security controls. Additionally, modern UIs can translate the underlying complexity of security management in terms relevant to business policy.

This Magic Quadrant represents a snapshot of the CSP market (as we define it). It will help you select a CSP vendor, but do not use it as your only aid. You should also consult the companion “Critical Capabilities for Content Services Platforms,” which will prove especially helpful for identifying vendors for particular use cases. Your final selection criteria must reflect your organization’s functional and technical requirements and business objectives. Do not, for example, select Leader or reject a Niche Player simply on the basis on those labels. 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 dynamics of the CSP market continue to shift. This market has traditionally been dominated by long-standing vendors focused on operational content needs, but customers are now expecting more in terms of “consumerization” of the user experience and products that address new ways of performing business operations. The tension between digital workplace requirements (for ad hoc, collaboration-rich, day-to-day usage) and digital business requirements (for operational, process-rich usage) are resulting in:

- **Continued expansion of SaaS-based vendors.** The reluctance of many organizations to put mission-critical content in a public cloud continues to decline. As it does so, vendors that have pure SaaS platforms and a well-developed information governance and security stance are gaining market share.
- **Modernization of long-standing platforms.** The shift in users’ expectations of, and new preference for, the cloud has motivated the long-standing vendors to modernize. Those vendors now provide either new SaaS platforms or have rearchitected existing offerings to be more flexible and adaptable.
- **A broadening of scope by industry-specific vendors.** Vendors that previously focused on industry-specific use cases, particularly in the legal market, are expanding their offerings to address wider business needs. They are challenging other vendors in areas where information governance and security are priority requirements.

Three further key points relating to the CSP market in 2018:

- Both the CCP market and the CSP market grew in 2018. Revenue in the former increased to \$3.8 billion, which raised its share of the total content services market from 33.7% in 2017 to 36.2% in 2018. The CSP market increased from \$6.3 billion in 2017 to \$6.8 billion in 2018.
- The ranking of the top-three CSP vendors — OpenText, Microsoft and IBM — was unchanged in 2018.
- The top-three vendors commanded 46.1% of the CSP market in 2018.
  - For additional market size and market share data for the content services market, see “Market Share Analysis: Content Services, Worldwide, 2018.”

## Gartner Recommended Reading

“How Markets and Vendors Are Evaluated in Gartner Magic Quadrants”

“Critical Capabilities for Content Services Platforms”

“Evaluation Criteria for Content Services Platforms”

“In-Depth Assessment of Microsoft SharePoint Online With Office 365 for Document and Records Management?”

“Toolkit: Sample RFP for Content Services Platforms and Content Collaboration Platforms”

“Create a Culture of Digital Dexterity With the ‘New Work Nucleus’”

“Control Content Sprawl With Federations”

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

## Evidence

Sources for the analysis in this Magic Quadrant include:

- A Gartner vendor and product survey conducted in May 2019
- A Gartner survey of vendors’ reference customers, conducted in May 2019, for which there were 187 respondents
- Gartner’s market share research
- Gartner Peer Insights vendor reviews
- In-person and video-based briefings with vendors
- Video demonstrations of use cases and usability
- Feedback from 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
- Vendors’ factual reviews

## 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.

**GARTNER HEADQUARTERS****Corporate Headquarters**

56 Top Gallant Road  
Stamford, CT 06902-7700  
USA  
+1 203 964 0096

**Regional Headquarters**

AUSTRALIA  
BRAZIL  
JAPAN  
UNITED KINGDOM

For a complete list of worldwide locations,  
visit <http://www.gartner.com/technology/about.jsp>

---

© 2019 Gartner, Inc. and/or its affiliates. All rights reserved. Gartner is a registered trademark of Gartner, Inc. and its affiliates. This publication may not be reproduced or distributed in any form without Gartner's prior written permission. It consists of the opinions of Gartner's research organization, which should not be construed as statements of fact. While the information contained in this publication has been obtained from sources believed to be reliable, Gartner disclaims all warranties as to the accuracy, completeness or adequacy of such information. Although Gartner research may address legal and financial issues, Gartner does not provide legal or investment advice and its research should not be construed or used as such. Your access and use of this publication are governed by [Gartner Usage Policy](#). Gartner prides itself on its reputation for independence and objectivity. Its research is produced independently by its research organization without input or influence from any third party. For further information, see "[Guiding Principles on Independence and Objectivity](#)."