

Magic Quadrant for Content Services Platforms

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Analyst(s): Karen A. Hobert, Michael Woodbridge, Joe Mariano, Gavin Tay

Content services platforms are the next stage of enterprise content management, representing a shift from self-contained systems and repositories to open services. This research helps application leaders evaluate CSP vendors' ability to deliver content services that enable digital business.

Additional Perspectives

- Midmarket Context: 'Magic Quadrant for Content Services Platforms' (5 October 2017)
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Strategic Planning Assumptions

By 2020, 20% of major EFSS and ECM vendors will morph their existing offerings into content service platforms.

By 2020, 15% of enterprises will have dropped their traditional ECM provider in favor of a provider that offers consumerlike content services.

Market Definition/Description

Cloud, social collaboration, mobile and analytics technologies have transformed demands and expectations for content in digital business. The variety and volume of content continue to grow. So does its importance: increasingly, IT and business leaders use content to complement or even drive digital business processes.

Content technology markets are evolving toward three areas: platforms, applications and components. This Magic Quadrant addresses the next stage in enterprise content management (ECM): the ECM market is now the content services platform (CSP) market. As a result, there are changes in how we define and analyze this market (see "Reinventing ECM: Introducing Content Services Platforms and Applications" and "What You Need to Know About Content Services Platforms" for additional information on how we have redefined ECM to CSP).

Gartner's new definition for this market is as follows:

A content services platform is a set of services and microservices, embodied either as an integrated product suite or as separate applications that share common APIs and repositories, to exploit diverse content types and to serve multiple constituencies and numerous use cases across an organization.

CSP vendors are recasting ECM in terms of a service-oriented architecture. This core is the basis of an integrated set of content-related services (and microservices — see Note 1 for a definition), repositories and tools that can be easily extended and adapted. A CSP has the flexibility to support existing and emerging content use cases. It has its own repository but should also be able to integrate external repositories through connectors, APIs or packaged integrations. Today, many CSPs can be deployed on-premises, in the cloud or in hybrid architectures.

A CSP is characterized in part by the breadth of its support for content types and formats over the entire content life cycle. Key capabilities include:

- Capturing and ingesting content in digitized formats, including scanning, content migration, user-created content or autogenerated content.
- Managing and retaining digitized content and associated metadata, including content associated with systems of record, file sync and transfer, search and findability, and metadata management.
- Processing digital business content, including developing workflows, and integrating with enterprise systems and data, line-of-business (LOB) processes, and purpose-focused applications.
- Improving user productivity through more-effective finding and use of digitized content in digital business initiatives.
- Providing platform services that combine integrated, content-related services and microservices, repositories, publicly available APIs for application integration, and administrative tools.
- Providing platform services that combine integrated, content-related services and microservices, repositories, logical information layers, and centralized administration of services and management tools.
- Integrating and extending the platform, content and interfaces to commonly used productivity, LOB and ERP systems through publicly available APIs for application integration, multirepository support, data integration extensions and out-of-the-box connectors.

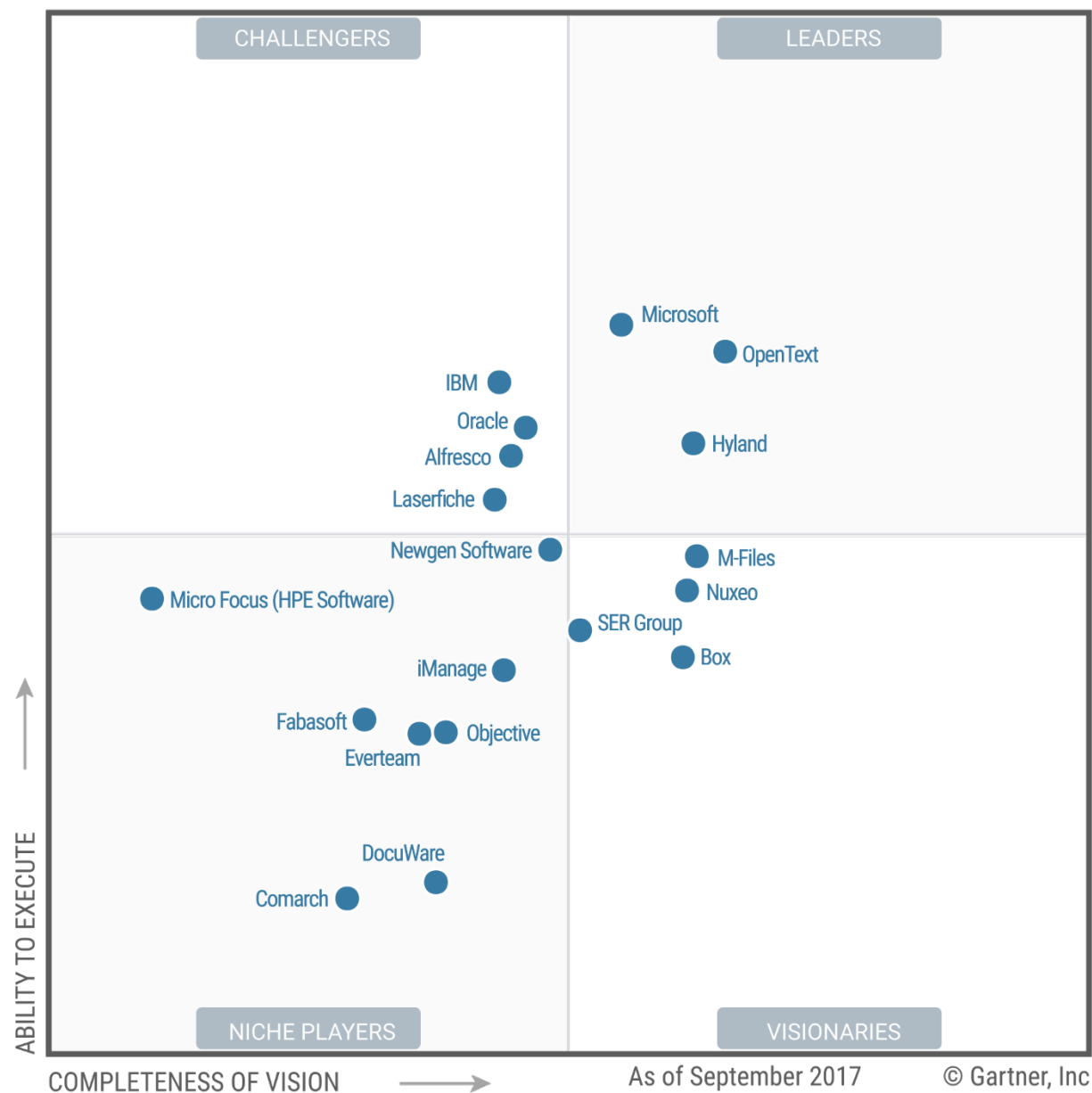
For a more complete listing of CSP functions and capabilities, see the Appendix.

Since the CSP market is an evolving market in 2017, we have updated the representative vendors, inclusion criteria and evaluation criteria. And while it has evolved from the ECM market, there are significant differences with respect to the makeup of its vendors. As such, the new lineup of evaluated vendors includes those we have evaluated in previous Magic Quadrants for ECM and those that would not have classically fit into the ECM market. The latter group comprises those that

were strictly platforms that did not offer packaged solutions, focused on a single vertical market, were too geographically localized or delivered lighter-weight content services functionality, among others.

Magic Quadrant

Figure 1. Magic Quadrant for Content Services Platforms



Vendor Strengths and Cautions

Alfresco

Alfresco is headquartered in Maidenhead, U.K., and San Mateo, California, U.S., with offices in Atlanta, U.S., Australia, France and Germany. The Alfresco Digital Business Platform comprises several services for content, processes, governance, integration and extension. The platform is built on an open-source core that leverages industry standards and open-standard APIs. The result is ready-to-use integrations with various productivity applications; the integrations can be customized and extended. Alfresco's Content Services mesh with its Process Services (Activiti-powered BPM) and Governance Services (automated records management). Deployment options are on-premises, in the cloud (SaaS and managed) and hybrid. Alfresco focuses on regulated industries including financial services, government, insurance, manufacturing, education and healthcare. Alfresco is a good fit for organizations that like to build their own applications and want the full control to do so.

Strengths

- Alfresco's open-source approach and extensive APIs and interfaces enable customers to easily customize its content services to their organization's specific requirements.
- Alfresco has taken steps to enhance its technology partnerships to advance differentiation and innovation, such as being the first content services provider on Amazon to be able to launch an Alfresco instance with an Amazon Web Services Quick Start button.
- In addition to Alfresco support offerings, there is a strong and active Alfresco user community that provides additional peer-to-peer support. Reference customers interviewed for this Magic Quadrant rated the community highly as a source of shared advice, support and information.

Cautions

- Alfresco lags behind other vendors in this market in the development of on-demand, pluggable services and connectors to external line-of-business, ERP and other content services applications. It relies on partners and third-party offerings to deliver connectors and extensions.
- Alfresco's platform currently does not fully or flexibly support the growing number of content repositories that are now typical for digital business.
- Reference customers interviewed for this Magic Quadrant reported dissatisfaction with Alfresco's "ability to understand their organization's needs" and "derived value provided by the product."

Box

Box is a public company founded in 2005, based in Redwood City, California, U.S., with offices in Europe and Japan. Originally, it focused on content collaboration services (previously labeled enterprise file synchronization and sharing [EFSS]). Today, it offers two products: Box, a package of CSP features and user interfaces, and Box Platform, a cloud-native API for extending content services to enterprise systems and a platform for building custom applications. Both are available in

the public cloud only, implemented in the vendor's own data centers in the U.S., or through Amazon Web Services, Microsoft Azure (recently announced) or IBM's local data centers in other regions. Box markets the offerings as a simplified, consumerized, cost-effective and agile set of CSP services that underpin digital transformation. It has about 76,000 customer organizations, 15,000 using the Box API, with a concentration in healthcare, professional services and financial services. It has about 10 million paying Box users. Many customers initially start with Box's foundational content collaboration services and expand their deployments into the Box Platform content services. Box Platform is a good fit for organizations modernizing content services approaches and leveraging cloud-based services to build customized content-oriented applications and interfaces.

Strengths

- Usability is a primary differentiator for Box, and its success here is reflected in the feedback from the reference customer surveys, where Box rated highly in terms of ease of use.
- The Box platform is particularly well-suited for content processes that span organizational boundaries, such as enabling collaboration between partner organizations.
- Reference clients rated Box professional and support services highly, commenting that the Box support team was knowledgeable and proactive in solving any problems during the implementation and customization of the platform.

Cautions

- Box's content management features — such as metadata, retention management, workflow, team workspace management — are stripped down compared with those of rival CSPs. They may not be robust enough to replace some legacy ECM capabilities.
- Box Platform has no capability to give customers insight, governance or functionality for remote repositories other than its cloud-only content repository.
- Reference clients expressed frustration with delays in meeting roadmap commitments for critically anticipated features — specifically Box Drive and Box Relay (still in beta), which have had very long development times compared to other content services.

Comarch

Comarch is an IT services and software company based in Krakow, Poland, with offices worldwide. Its biggest presence is in Europe, specifically the DACH region. The Comarch CSP, introduced in 2008, has a broad range of content-related capabilities and several dedicated vertical solutions. Comarch CSP can be procured as an on-premises solution or in the cloud, as a SaaS solution run from Comarch's network of data centers operated across the world. Comarch is designed as an enterprise content services solution to address full content management needs, including document capture, OCR, workflow, records, life cycle and archiving. Comarch offers packaged solutions for specific verticals, including healthcare, retail, manufacturing, banking and insurance. It has over 500 customers and about 270,000 users. Customers range from small to large organizations, and the largest bloc is in manufacturing. Comarch's solution is a good fit for EMEA-centered organizations

that want traditional content management capabilities to address the full range of content, processing, records and life cycle of their enterprise content and business processing.

Strengths

- Comarch has a good set of "traditional ECM" features, such as document management, capture and workflow. These features are available in both the on-premises and cloud offerings.
- Though Comarch markets its CSP as a horizontal solution, it has several strong industry-specific content services applications in healthcare, CRM, ERP and finance.
- Reference customers surveyed for this report rated Comarch highly for its prompt and knowledgeable implementation support. All of them said that they would recommend Comarch to other, similar organizations.

Cautions

- Comarch has few large, global enterprise customers. Prospects that need scalability and geographic reach should validate with the vendor and reference accounts that Comarch can support their requirements.
- The Comarch platform is maturing and currently offers basic functionality, in comparison to other CSPs, for social and collaboration, reporting and analytics, and integration capabilities.
- The overall user experience of the Comarch platform has not kept abreast with those of other CSP vendors in terms of usability requirements, such as adaptive user interfaces across devices.

DocuWare

DocuWare is based in Germering, Germany. Its CSP offerings include DocuWare for document capture and management, DocuWare Workflow for business processing, and DocuWare Intelligent Indexing for metadata management and content indexing. All are available either on-premises or in a multitenant cloud built on a Microsoft Azure infrastructure. DocuWare has regionalized sale directors in Europe, North America and Latin America. It is expanding globally in Western Europe, South Africa and the Middle East as part of a new market expansion program. The vendor offers horizontal processing solutions such as invoicing, purchasing, employee onboarding and other common business processes. It specializes in document processing for the automotive, government (financial processes), manufacturing, educational and retail verticals. DocuWare is a good fit for small and midsize enterprises looking for traditional content management capabilities, with flexible purchasing options and delivery models.

Strengths

- DocuWare's cloud and on-premises offerings have feature parity for seamless hybrid deployment. They let customers of all sizes acquire traditional content services that focus on core features: imaging, document management, workflow, intelligent indexing and content archiving.

- DocuWare is strongest in the EMEA and North American markets, is expanding throughout Western Europe and South Africa, and is increasing its current visibility in the Latin American and Middle Eastern markets.
- Reference customers reported high levels of overall satisfaction with their DocuWare implementation, citing how the product offers good value, how responsive the vendor is to their needs, and how the product has been enhanced to meet their requests.

Cautions

- DocuWare has been slow to incorporate emergent content services features, such as content analytics and multirepository support deployment. It is lagging behind competitors in this market.
- DocuWare focuses its marketing and sales efforts on delivering horizontal use cases for accounting, finance, human resources and customized applications. It does not market to, or offer direct sales and solutions focused on, specific industries, which may not be a match for some industry-specific content services requirements.
- Some customers say that customizing or integrating the DocuWare environments with other systems is difficult, and that professional services support is required for specialized integrations.

Everteam

Everteam is headquartered in Lyon, France, with a U.S. regional headquarters in Boston, Massachusetts and regional offices in Europe, the Middle East and Asia. Its CSP suite, Everteam, includes everteam.document, everteam.capture, everteam.case, everteam.records, everteam.archive, everteam.process and everteam.analytics. The platform is available as on-premises software or a SaaS-based cloud service. It is a mature product, with information governance and a wide range of content capabilities, from document management to workflow and business processing. The company is investing heavily in redeveloping the product into a microservice platform for content-centered application development. It's also investing in natural-language processing and machine learning for content and file analytics services, with autotagging, tagging and managing files across multiple repositories, including ECM stores. The CSP offers publicly available APIs with connectors to many common content services. Everteam's partner network offers regionalized solution development, product implementation and support. The vendor sells mainly to midsize and large enterprises as well as government agencies in Europe and the Middle East, but has been expanding in North America, Asia/Pacific and Latin America. Key vertical practices are engineering, government, insurance and utilities. Everteam is a good fit for customers that need expanded and innovative approaches to the processing, analytics and oversight of unstructured content.

Strengths

- Everteam's new microservice architecture includes a modernized application layer for building content-centric applications and interfaces.
- Everteam's emphasis on governance — through content and file analytics for tagging and classification of content across multiple repositories and systems — aligns with customers' content services strategies for cross-repository openness and centralized oversight.
- Reference customers reported high levels of satisfaction with their Everteam investment, from procurement to implementation to support. They gave the vendor high marks for its support and implementation expertise.

Cautions

- Outside of the EMEA market, Everteam's market presence is still maturing and relies entirely on implementation partners. Customers should work with the vendor to identify partners that are fully experienced in Everteam solution delivery.
- Everteam struggles to articulate the services-oriented transformation of its platform and value proposition, with inconsistent messaging and strategies, especially in maturing regions such as the U.S. The market assumes that it is still a regionally focused ECM provider.
- In Gartner surveys, customers have said that Everteam is inconsistent in how completely it implements functions, requiring additional effort by customers to integrate or enhance the platform.

Fabasoft

Fabasoft is a software vendor and cloud services provider headquartered in Austria. It offers two on-premises CSP products, Fabasoft Folio and Fabasoft eGov-Suite, and a Europe-based cloud offering, the Fabasoft Cloud. Fabasoft's cloud platforms are deployed via appliances, making for simplified and rapid implementation of the vendor's CSP services in any cloud environment — public or private. Fabasoft offers app.ducx and app.test development modules for modeling, developing and testing customized customer solutions. The Fabasoft platform is an integrated solution that covers all parts of the document life cycle and digital records management. The vendor targets highly regulated businesses that are subject to the General Data Protection Regulation (GDPR) and other data privacy regulations. Its adaptive client interface includes integrations into Microsoft Office, Microsoft Office 365 and many other productivity tools. Its primary focus market is the European Union, specifically regulated industries including manufacturing, healthcare, finance and the public sector. Fabasoft's CSP capabilities are tightly integrated with Mindbreeze InSpire, an enterprise insight and search appliance owned by the Fabasoft Group. It is a good match for regulated businesses with a need for content classification, insight, records and content life cycle management.

Strengths

- The Fabasoft platform supports broad integration with content and data systems for process-oriented use cases.
- Tight integration with Mindbreeze InSpire is a key differentiator for Fabasoft in this market, providing extended autoclassification, business process management and metadata extraction from documents across multiple repositories.
- Reference customers praised the ease of initial deployment and getting started with Fabasoft's products, especially when working directly with Fabasoft support professionals.

Cautions

- Fabasoft has limited ability to support customers outside of Europe, and offers cloud data centers only in Europe.
- Fabasoft is now encouraging new customers to adopt its cloud-based CSP appliance offerings, the Fabasoft Cloud or the Fabasoft Private Cloud, intending to phase out traditional deployments on customer hardware.
- Reference customers cited that initial implementation is critical to future success, requiring experienced partners that can build detailed system requirement plans and use cases from the outset.

Hyland

Privately owned [Hyland](#) is based in Westlake, Ohio, U.S., with regional offices in Latin America, EMEA and APAC. Its OnBase product offers a wide range of content capabilities, from document management to content analytics. Its newest service is ShareBase, which streamlines both internal and external collaboration experiences, and can leverage OnBase capabilities. OnBase is available as on-premises server software or as SaaS. Hyland's customers are mainly North American midsize-to-large corporations. Hyland has long differentiated itself with a focus on strong horizontal- and industry-specific content solutions. It has deep expertise in healthcare, higher education, insurance, government and financial services. Hyland is also a good fit for enterprise customers that want to combine traditional content management capabilities with out-of-the-box, end-to-end content processing apps for horizontal (ERP) or vertical business needs.

Note: At the time of writing, Hyland had recently acquired Lexmark's Perceptive CSP. Hyland has not yet revealed how it will incorporate Perceptive into its product roadmap and corporate strategy. This Magic Quadrant evaluates OnBase 16. OnBase 17 was released for general availability in June 2017, after the cutoff point for evaluation.

Strengths

- Hyland's realigned platform-focused value proposition emphasizes rapid deployment of content services and purpose-focused solutions. It continues to attract new line-of-business buyers and customers looking to migrate from legacy ECM solutions.
- Hyland is aggressively rebuilding its OnBase platform, modernizing the user experience and ensuring "any device/anywhere" access to content.
- Reference customer expressed satisfaction overall with Hyland's easy API-based integrations, as well as with the high-quality third-party integrations via Hyland partners and service providers.

Cautions

- Hyland's SaaS pricing is complicated and costly compared to rival CSP vendors. Some reference clients in our survey complained of inflexible pricing and contract negotiation.
- Hyland's recent Perceptive acquisition is a new venture for this long-stable vendor, introducing product as well as customer base complexity that may disrupt development and marketing efforts — traits that many OnBase customers find attractive.
- Hyland has limited global presence (92% of its market is in North America), although has gained global presence with its recent acquisition of Perceptive. Prospective international customers should do due diligence on its partner channel and its ability to support their deployment.

IBM

IBM, based in Armonk, New York, U.S., has an extensive set of global content services products. These include Content Foundation (based on IBM FileNet Content Manager), Content Manager OnDemand (CMOD), Datacap, Enterprise Records, Connections Enterprise Content Edition, Watson Explorer Enterprise Edition and Case Manager. All are available as on-premises or cloud-based managed services. IBM has a strong vertical focus, with deep presence in the financial services, insurance and government sectors, and in IBM-centric organizations in other sectors. It augments its own sales and professional services teams with a strong set of system integration and ISV partners to meet the content needs of large, global enterprises. IBM's content services include strong records management, process management and audit capabilities. IBM is a good fit for risk-averse organizations that have strict compliance requirements, and for organizations that have structured, content-centric process needs, such as for loan origination or claims processing.

Strengths

- IBM's content and predictive analytics capabilities, coupled with its integration strengths, enable it to support complex processes such as fraud detection, patient care, and insights that cross corporate boundaries and information sources.

- IBM's Enterprise Records suite, for records management and compliance uses, is one of the most complete records management offerings in the industry. It covers the whole spectrum from policy management to execution.
- IBM's global reach and partner ecosystem are unmatched. It's especially strong in large insurance firms, banks and governments.

Cautions

- IBM has not moved as quickly as some competitors to embrace the public cloud. IBM and its partners host IBM content applications on managed private cloud deployments. Customers and prospects looking for public cloud services may find that the vendor's public cloud offerings will not meet their requirements for some services.
- Changes in top management and key content services personnel in recent years have had a negative impact on IBM's content services product development and strategy.
- Some reference customers, especially midsize companies, expressed frustration over the cost of deploying and maintaining IBM Content Foundation and IBM Case Manager on-premises.

iManage

Headquartered in Chicago, Illinois, U.S., [iManage](#) targets law firms, corporate legal departments and professional services firms with its iManage Work 10 suite. It also offers iManage Govern for records management, iManage Share for external file sharing and collaboration, and iManage Insight for enterprise search capabilities. iManage is a vertical specialist, with a platform optimized for legal and professional services use cases. It is focused on core document management, records management and document-centric collaboration capabilities. iManage has been in the CSP market in various iterations for over 20 years — first as an independent company, then as a serial acquisition by Interwoven, Autonomy and Hewlett Packard. It came full circle in July 2015 after a management buyout from HP and is now again a privately held, independent company. iManage Work 10 is a good fit for legal industry and professional services customers that want traditional content services and functionality along with processing applications geared to legal content use cases.

Strengths

- iManage has served customers for more than two decades, and has a large installed base among global law firms and professional services organizations. The vendor targets these verticals well, having engendered happy and loyal customers.
- iManage experienced good revenue growth in 2016 with its renewed customer focus, and has opened customer support centers in Chicago, London, Belfast, Bangalore and Sydney.
- Scalability and content security are areas that some reference customers found to be particularly strong for iManage. In addition, legal customers have long touted iManage Work's tight integration with email as a benefit.

Cautions

- iManage Work has mainly been deployed on-premises. The vendor's multitenant cloud platform is relatively new, having been rebuilt and relaunched in 2017.
- As a vertical content services specialist in the legal industry and professional services, iManage Work may not be suitable for all prospects.
- Reference customers indicated that iManage could improve its routing and process handling capabilities.

Laserfiche

Laserfiche, based in Long Beach, California, U.S., offers a full set of CSP capabilities in on-premises and SaaS offerings. The portfolio includes core content management capabilities, Laserfiche Quick Fields, image processing, Laserfiche Records Management and Laserfiche Forms workflow. Laserfiche Cloud, a SaaS offering hosted on AWS, includes file syncing and sharing capabilities for document collaboration and secure offline document access capabilities. The platform uses publicly available APIs for application development, advanced forms-based process creation and content-centric business process development (using visual workflow designer tools). The vendor has expanded the operational dashboard for centralized monitoring of processes and progress; a Business Process Library rounds out the process offering. The platform is available in all regional markets through direct and VAR partnerships, and the vendor's partner ecosystem is extensive. Laserfiche is especially strong in the government, financial services, higher education, healthcare and manufacturing sectors. It is a good fit for customers that want traditional content management plus out-of-the-box business process solutions for digital transformation.

Strengths

- Laserfiche has a well-integrated and extensive set of content services, combined with strong support for designing and implementing content-centric business processes.
- Laserfiche is keeping up with content services trends and messaging through a platform-oriented vision that explicitly focuses on digital transformation.
- Reference customers continued to report high satisfaction levels with the vendor and platform, citing rapid implementation and ease of use, along with positive and responsive support from the vendor and its partners.

Cautions

- Customer claims and sample RFPs reveal higher software licensing prices compared to those of other vendors in this market, although overall TCO may prove more cost-efficient over time.
- Outside of its core industry verticals, Laserfiche places heavy reliance on business partnerships for industry-specific expertise and regional sales. Customers should work with Laserfiche to identify Gold Certified Partners for the most experienced support.

- Reference customers warned that complex implementations and customization require careful planning and the support of skilled Laserfiche professional services to get most from the platform.

M-Files

M-Files is a privately owned company based in Tampere, Finland, with a North American headquarters in Dallas, Texas, U.S., and offices in the U.K., Canada, France, Germany, Australia and Sweden. Its CSP product, also called M-Files, has a broad range of capabilities deployed on-premises or as a public or private cloud. M-Files is very closely aligned to the Microsoft ecosystem: The platform was developed using an array of Microsoft components and is tightly integrated with the Microsoft end-user experience. M-Files promotes the idea of "intelligent information management," which is based on a classification, management and functional services layer for content and structured information, regardless of its source repository. The M-Files customer base is primarily small-to-midsize enterprises (those under 1,000 employees) in traditional markets for CSPs, such as finance, manufacturing, engineering, construction and professional services. 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.

Strengths

- M-Files is a relatively simple product to install, configure and manage. It fits especially well with customers that are invested in a Microsoft infrastructure.
- M-Files has a well-thought-out strategy and product offering to address customers' fast-growing number of content repositories, as well as the attendant migration costs, impact and effort of migrating from existing repositories and incorporating cloud-based content.
- Reference customers rated M-Files highly for usability, with fully featured experiences regardless of device or interface: its web, desktop and mobile clients provide ways of working that are familiar to users.

Cautions

- M-Files targets the midsize enterprise (MSE) market, with some successful large-enterprise deployments. Accordingly, it may lack the experience and resources to deploy its CSP on a scale that some rivals can.
- The M-Files platform repository layer has some limitations on the number of objects that can be stored. Multiple repositories ("vaults" in M-Files terminology) will be needed in very large deployments, thereby increasing the architectural footprint and potentially leading to an increase in operational management.
- M-Files has targeted certification for local standards such as SÄHKE2 (a Finnish standard), but lacks certification or statements of compliance for international or U.S.-based standards such as DoD5015.2, MoReq2 or ISO 15489.

Micro Focus (HPE Software)

Micro Focus (HPE Software), based in Newbury, U.K., is a global enterprise software company. The Micro Focus and heritage HPE Software spin-merge, which finalized on 1 September 2017, consolidates the content offerings into a single CSP: Micro Focus Secure Content Management (SCM). The platform can work with the heritage HPE ControlPoint data and content analytics product. It can also work with the heritage HPE structured data management capability, SecureData Manager (SDM), which enables records management, archiving and compliance for content life cycle management across large volumes of unstructured and structured content. Technical partnerships with Iron Mountain, Objective and Microsoft (for SharePoint integration) serve to expand the CSP offering. Micro Focus SCM focuses on regulated industries such as life sciences, financial services, government, oil and gas, and manufacturing. Micro Focus SCM is a good fit for large enterprises in need of content life cycle management and enterprise information management.

Strengths

- The integration of SCM with other heritage HPE Software products — especially ControlPoint data and content analytics, and SDM for records management and compliance tools — creates a set of capabilities that fit very well with data and content life cycle management needs for organizations with large volumes of enterprise content.
- Strategic technical partnerships, especially with Objective and Iron Mountain, extend Micro Focus SCM with risk and compliance, productivity, and collaboration scenarios.
- Reference customers reported high levels of satisfaction with the heritage HPE Software's content and records management services, especially when spanning a range of enterprise data sources and systems. Customers cited significant cost-savings after implementing the HPE platform.

Cautions

- Micro Focus does not offer cloud or managed hosting directly. Customers must get cloud-based Micro Focus content services from hosting partners.
- The Micro Focus SCM platform is relatively weak in supporting user productivity and business processing. Reference customers said that usability is lacking and not up to date with modern user interfaces.
- HPE Software reference customers reported confusing messaging around content services, product lines, roadmaps and release schedules. The spin-merger with Micro Focus has increased customer inquiries about how heritage HPE Software products will be supported by Micro Focus research and development.

Microsoft

Microsoft, based in Redmond, Washington, U.S., has an international presence and delivers a core set of collaborative content management capabilities as part of its SharePoint offerings, including SharePoint Server and Office 365 via SharePoint and OneDrive for Business. SharePoint Server is

available on-premises, while SharePoint Online is a cloud-based multitenant offering typically bundled with Microsoft Office 365 subscriptions. Although the two products use common code bases, they differ programmatically and functionally. Microsoft released a mobile app for SharePoint in 2016. SharePoint is tightly integrated with Microsoft Office and Microsoft OneDrive for Business, as part of the Office 365 productivity platform. Seamless integration with emerging cloud-based Microsoft applications such as Teams, Flow and Microsoft Graph means richer team-based and insight-oriented content productivity use cases. Microsoft is a good fit for customers with deep Microsoft investments for productivity and business processing.

Strengths

- Microsoft sees content services as foundational capabilities of its widely used and familiar office productivity lines, especially the Office 365 cloud platform. As a result, content services are intimately linked with the vendor's goal of effectively delivering digital business productivity for business customers.
- Microsoft SharePoint Online, delivered as part of Office 365, enables organizations to participate in a collaborative, contextual user experience, as part of a productivity services platform offering a broad range of user-centered content capabilities.
- Reference customers were very satisfied with the availability of high-quality (Microsoft and third-party) professional services, documentation, self-service and add-on solutions that augment or extend SharePoint, such as expanded content life cycle management or business processes.

Cautions

- SharePoint as a CSP is part of the larger Microsoft productivity platform. Most value is derived from the entire platform of services rather than from SharePoint as an individual solution, which is only focused on content-oriented productivity over other CSP use cases.
- Microsoft SharePoint customers depend on additional products to round out its CSP capabilities. Organizations turn to Microsoft (e.g., Flow in Office 365) and/or third-party BPM extensions when building industry-specific content services applications.
- Reference customers rated the ease of integration using the standard Microsoft APIs and tools as merely average. Integration too often requires custom integration that adds complexity, cost and time to implement (regardless if they turn to the recent SharePoint Framework or third-party development to make it work).

Newgen Software

Newgen Software is based in New Delhi, India, with regional offices in the U.S., Canada, Dubai, the U.K. and Singapore. Its CSP product has five components: OmniDocs for end-to-end ECM; OmniFlow iBPS for BPM; OmniScan for document capture, digitization and delivery; OmniAcquire for on-demand information capture from a wide variety of endpoints; and the Newgen Enterprise Mobility Framework for building and managing secure, configurable hybrid mobile apps. The vendor offers several well-established, industry-specific turnkey solutions, and develops custom solutions

for specific needs. The platform is based on a microservice architecture that enables digital transformation. Its main markets are the financial services (including banking and insurance), government and shared-service sectors. Newgen is a good fit for firms of many sizes, including small and midsize firms, and for those looking for traditional and transformative content services that support regulated and sensitive content use cases.

Strengths

- Newgen has realigned its CSP strategy and product development to focus on digital business transformation through integrated and flexible content services. The change fits those customers that want to balance requirements for specific business processes with requirements for enterprise modernization.
- Newgen continues to expand the platform's range of domain expertise and industry-specific competitive solutions through its growing partner network as well as regional and industry centers of excellence.
- Nearly all the Newgen reference customers surveyed for this report said they were "completely satisfied" with the vendor's service and support, and praised its timeliness to respond to support requests.

Cautions

- Despite increased sales and marketing activities, Newgen is seldom asked about in Gartner inquiries, indicating limited market awareness of its CSP expertise.
- Newgen is adept at using leading-edge technologies, such as chatbots and conversational UIs, in many of its custom content application projects. But the vendor doesn't leverage these capabilities, or their benefits for customers, in its mainstream CSP product.
- Newgen's reference customers rated as "average" the ease of integration using standard APIs and tools. This indicates that a higher degree of customer effort is needed to embed CSP capabilities within the organization.

Nuxeo

[Nuxeo](#) has headquarters in New York, U.S., and offices in the U.K., France, Portugal and other offices in North America. The Nuxeo Platform, introduced in 2008, is an open-source, subscription-based CSP available on-premises, in the cloud or in various hybrid deployments. It has a broad range of content services, including digital asset management (DAM) and a comprehensive API. The vendor has begun provisioning SaaS-based applications for several use cases — the first ones being DAM and case management, which are expected to be released later in 2017. The platform uses a modular architecture, with support for NoSQL databases and other popular open-source components, such as Elasticsearch. An aggressive growth plan, backed by a recent new round of venture capital, aims at disrupting traditional CSP vendors across a broad set of use cases. The vendor has been successful among midsize-to-large enterprises, especially in financial services and federal government. It currently targets financial services, technology and public-sector organizations, as well as consumer products, retail, manufacturing, entertainment and media that

require DAM. Nuxeo is a good fit for customers that plan to develop customized content services, applications and extensions for line-of-business applications and systems.

Strengths

- Nuxeo's modern and modular platform gives customers the ability to fine-tune the platform to meet their specific needs, such as choosing between a traditional RDBMS or a NoSQL approach for scalability, distributed data centers and adaptable metadata handling.
- Nuxeo explicitly recognizes the reality that enterprise content will reside in multiple repositories, which in turn will still need flexible, centralized management and access.
- A common theme in reference customer feedback is the speed of implementing the Nuxeo Platform and how quickly customers were able to gain value from their investment. Over 60% of respondents said the implementation took less than six months; over half of these said it took less than three months.

Cautions

- Nuxeo is a small and maturing company with a handful of North American and Western European offices. Its partner channel is limited compared to those of larger rivals.
- The Nuxeo Platform lacks the feature richness of rival products, especially in content capture and records management. Capture, for example, relies entirely on offerings by partners such as Ephesoft.
- The many platform deployment options can present a degree of complexity. Reference customers reported that internal staff responsible for supporting, maintaining and improving the solution would benefit from early, comprehensive training.

Objective

Objective is based in Sydney, Australia. Its core CSP product is Objective ECM, which includes traditional document management, content collaboration, records management and workflow modules. There are five complementary solutions: Objective Trapeze for image and drawing processing, Objective Keystone for document collaboration, Objective Connect for secure external collaboration with files, Objective Inform for content governance, and Objective Perform for content-driven processes. The vendor specializes in the public sector and highly regulated industries in Australia, New Zealand, the U.K. and now in the U.S., through a recent acquisition. Objective has developed a technical partnership with Micro Focus (HPE Software) and has developed significant integration across the product lines to offer clients enhanced experiences, records management and data integration capabilities for their mutual installed bases. Objective is a good fit for government and public-sector organizations looking for content-enabled business applications that ensure compliance and information governance.

Strengths

- Objective has strengthened its global partnership with Microsoft to give customers improved regulatory governance features when implementing Office 365. It also recently created an integration interface for Micro Focus Secure Content Management (SCM). Both signal the vendor's effort to grow its channel and international presence.
- Objective has clarified its CSP product positioning in its latest software releases, aligning itself more exactly with emerging customer CSP demands.
- Objective has long experience and deep expertise with government-related records management, compliance and privacy. It has a growing portfolio of related content-enabled applications as a prime competitive differentiator.

Cautions

- Prospective customers outside Asia/Pacific and the U.K. should carefully evaluate Objective's capabilities in their regions.
- Objective's modular product line may be confusing to buyers looking for a single service. Customers should evaluate their project requirements and select modules that match their content services needs.
- Reference customers rated the ease of integration using standard APIs and tools as "average," suggesting that improvements are needed so that customers can more easily incorporate the platform's CSP capabilities with their infrastructure.

OpenText

[OpenText](#), based in Waterloo, Ontario, Canada, has a large content and information product portfolio comprising content services, BPM, analytics and customer experience management. OpenText offers two CSPs — its long-standing Content Suite and Documentum, which it acquired in early 2017 from Dell EMC. OpenText's CSPs can be purchased in a variety of deployment options: on-premises (OpenText Content Server or Documentum Platform), as managed hosted services (OpenText Cloud) or as multitenant SaaS services (OpenText Leap). Complementary Documentum content products include D2 for document management, Captiva for capture, Records Management, Information Rights Management, Kazeon file intelligence and xCP for workflow. The vendor has a global reach and penetration into most industry verticals, and Documentum brings specific strength in the life sciences market. OpenText is a match for firms looking for expansive content services that meet numerous use cases, and for business processing of unstructured content.

Strengths

- OpenText's dominant market share, professional services capability and extensive partner network make it an obvious CSP candidate for organizations that want a proven and trusted partner, which can address a broad range of horizontal and vertical requirements.

- OpenText has invested heavily in embedding CSP capabilities within common line-of-business and productivity applications, creating a contextualized user experience. Its partnership with SAP in particular created many deep integrations that let SAP customers easily exploit content capabilities.
- Reference customers rated OpenText highly for its integration capabilities, including a large range of prebuilt adaptors, and for the breadth and capabilities of the platform's APIs.

Cautions

- Gartner clients have expressed concerns about OpenText's management of maintenance contracts — specifically a move toward performing license audits that could result in an increase in annual maintenance costs. Prospects and customers should pay careful attention to contract terms during negotiation and be prepared to work regularly with OpenText to ensure compliance.
- The vendor's CSP portfolio consists of many disparate products, some of which have considerable overlap and could confuse prospects about an optimal solution path. Prospects should review OpenText's product roadmaps to ensure they meet their use case requirements.
- OpenText solutions can be complex to configure and deploy. The typical time scale to complete an OpenText implementation is among the longest of the vendors surveyed for this research. (Note: This longer time scale is also partially attributed to the scale and scope of these deployments.)

Oracle

[Oracle](#), based in Redwood City, California, U.S., has long provided a comprehensive set of content management capabilities as infrastructure. The vendor's CSP offerings are the on-premises Oracle WebCenter Suite Plus including WebCenter Content, WebCenter Portal and WebCenter Sites. The SaaS-based Oracle Content and Experience Cloud is a multitenant cloud service offered as part of the Oracle Cloud Platform. WebCenter Content is often used to support organizations' records management and compliance needs. It integrates with many business applications to support back-office applications and enable the content ecosystem. Oracle today is placing more emphasis on cloud-based delivery options. For content-centric applications, Oracle relies on its partner ecosystem. Traditionally, the vendor has targeted large, global enterprises, but with the shift to "cloud-first," it will target the midsize enterprise market more directly. Oracle is a good fit for customers that have Oracle systems, especially its ERP solutions, and want the flexibility of hybrid on-premises and cloud-based content services deployment.

Strengths

- In shifting to a cloud-first strategy, Oracle is combining its traditional content infrastructure strengths with a new focus on making content actionable. This shift matches the customer trends, directions and requirements that Gartner sees emerging in the content services market.

- Oracle has the sales force, tech support staff and services, consulting expertise, and broad partner network to fully support large-scale, global content services initiatives.
- Reference customers surveyed for this Magic Quadrant rated Oracle's scalability, integration and interoperability as its strongest capabilities.

Cautions

- Oracle's two products — on-premises and cloud — have different design goals, use cases and architecture. Organizations need to identify their content services use cases and make sure to align with the appropriate Oracle offerings.
- Oracle's integration with non-Oracle line-of-business application data and content is limited, and may not meet content services use cases that call for managing heterogeneous content.
- Most reference customers said that the Oracle WebCenter user interface was dated, needing look and feel improvements, and that its document capture/ingestion capabilities are not strong enough for their needs.

SER Group

SER Group is headquartered in Bonn, Germany, with subsidiaries and local branch offices across Europe, China, India and Latin America. Its Doxis4 CSP platform is a set of integrated, modular components for capturing, archiving and managing content, with a special focus on information logistics. There are also capabilities for collaboration, federated search, workflow and content processing across varied content ecosystems. The vendor has expanded content analytics and automation capabilities by leveraging machine learning to automate ingesting, classifying and managing content metadata. Doxis4 deploys on-premises or in the cloud (including a cloud-based file syncing and sharing module). SER Group has several separate, regional companies, each with dedicated sales and support resources for target verticals, including government, healthcare and banking. SER Group is a good fit for regulated EMEA and APAC enterprises wanting comprehensive CSP capabilities that can be adapted across large content ecosystems as well as across various working scenarios, locations and industry-specific solutions.

Strengths

- SER Group is a long- and well-established CSP vendor that is completely self-funded and develops all its technology. Its business practices have established a strong track record in developing advanced technologies and simplified user interfaces for its CSP platform, as well as in market expansion (as witnessed by strong revenue growth).
- SER Group's unified CSP platform is built as an integrated, cross-functional Content Service Bus that can federate content sources, deployment models and processes.
- Reference customers gave high marks to the ease and speed of piloting and deploying the SER platform when using its native capabilities and services.

Cautions

- SER Group remains relatively unknown in North America, and has no current plans to expand into the region.
- The platform's external metadata capabilities only support federated searching, while its internal metadata layer supports Dosis repositories at this time.
- Some reference customers say that making customizations, integrations and application development can become complex and difficult, requiring skilled system integrators or SER Group's professional services team. In some regions, such support can be difficult to find.

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

Based on the revised inclusion criteria, the following vendors have been added:

- Box
- Comarch
- DocuWare
- Fabasoft
- iManage
- Micro Focus (HPE Software)
- Nuxeo

Dropped

- **Dell EMC:** In January 2017, Dell EMC's Enterprise Content Division (ECD), including the Documentum, InfoArchive and Leap product lines, was acquired by OpenText.
- **Lexmark (now Kofax):** On 12 July 2017, private equity firm Thoma Bravo finalized its purchase of Kofax's Enterprise Software business. In the deal, Thoma Bravo sold the Perceptive CSP business to Hyland (also a Thoma Bravo property), effectively moving the Kofax CSP business to Hyland. It retained the remaining Kofax/ReadSoft properties, including the Kofax Total Agility BPM solution.

- **Xerox:** In early 2017, Xerox separated and reformulated its DocuShare business from its parent company. In the process, its original ECM products have also been separated across the new companies. The current form of the DocuShare product does not meet our inclusion criteria.

Inclusion and Exclusion Criteria

The inclusion criteria represent the specific attributes that Gartner determined to be necessary for inclusion in this Magic Quadrant. *For 2017, Gartner updated three inclusion criteria, retired three and added a new one.*

Inclusion Criteria

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

1. Offering: Vendor has a *generally available* CSP offering for the enterprise market as of 31 March 2017. It must be available as a separately billed, stand-alone product.

2. Revenue: Vendor must have had *at least \$15 million* in total revenue derived from CSP sales in 2016. Total CSP revenue is aligned to 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 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.

3. 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 (e.g., 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 invisible to the end user.

4. 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

5. Integration: Vendor must offer integration capabilities through publicly available APIs, native connectors, extensions, plug-ins and interfaces with EDI, LOB, HRMS, CRM, ERP, CMIS and so on.

6. References: Vendor supplies details of five customers that must have deployed the service or product for a minimum of six months. These must be new references that have not been provided in prior years, and should be deployments that have occurred in the last 24 months. References should reflect users that have a minimum of 250 seats deployed, though deployments supporting larger numbers of users are preferred. References must represent a diversity of industries, company sizes and geographies.

Retired Criteria

The following inclusion criteria from the 2016 Magic Quadrant for ECM have been retired this year:

Note: These may be still be valuable to specific organizations when evaluating CSP vendors, but Gartner does not consider them essential criteria in all cases.

- **Analytics/BI:** Vendor must offer content analytics and/or BI capabilities either natively or through integration with analytics engines.
- **Geographic presence:** Vendor must actively market its products and have an established customer base in at least two major regions — for example, North America *and* Europe, the Middle East and Africa (EMEA), or Asia/Pacific *and* Latin America. At least 10% of overall revenue must come from outside the vendor's home market — if the vendor has presence in

North America and Europe, and North America is the home market, then 10% of revenue must come from Europe.

- **Packaged apps:** Vendor must offer at least three packaged apps that provide vertical or specialized industry solutions.

Honorable Mentions

Vendors that did not qualify for inclusion in this Magic Quadrant, but which clients may also wish to consider, include:

- Adobe
- Docurated
- NetDocuments
- SpringCM
- Veeva

Evaluation Criteria

Ability to Execute

Gartner analysts evaluate technology vendors on the quality and efficacy of the processes, systems, methods or procedures that (1) enable them to be competitive, efficient and effective, and (2) 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	Low
Customer Experience	High
Operations	Medium

Source: Gartner (October 2017)

Completeness of Vision

Gartner analysts also evaluate technology vendors on the vendors' ability to convincingly articulate logical statements about the market's current and future directions, innovation, customer needs, and competitive forces, and on how well these statements match Gartner perspectives. 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 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 and cloud repositories
- Business application interaction
- Vertical solutions and business processing
- Collaborative authoring features

- Content analytics

Table 2. Completeness of Vision Evaluation Criteria

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

Source: Gartner (October 2017)

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 content services platforms (CSPs), they have strong channel partners, presence in multiple regions, 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 demand for direct delivery of most (if not all) of the eight essential functional components of CSP software, that 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. They typically 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 geographical coverage, but they execute well despite some product or market share limitations.

Visionaries

Visionaries may offer all eight of the essential functional components of CSP software natively. 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 December 2017, Gartner renamed the enterprise content market (ECM) as the content services platform (CSP) market to better represent its evolution — in business content requirements, technologies, products and vendor strategies — over the last few years. This renamed CSP Magic Quadrant specifically focuses on how a key group of vendors are responding to these changes, and the implications of this for application leaders responsible for enterprise content services.

In broad terms, the emerging CSP market has the following characteristics:

- A platform orientation, including service-oriented architecture, integrated content repository, and content-related services and user interfaces, instead of prebuilt, content-oriented process applications.
- A services-led architecture that enables content-oriented capabilities in 14 functional areas (see the Appendix), all of which can be delivered in on-premises, cloud or hybrid deployments.
- Agile and flexible services and interfaces that can be customized, extended and integrated through publicly available APIs, connectors to commonly used productivity, EPR and line-of-business applications.
- Innovation in content-related processes, emergent analytical and intelligent functionality, and new approaches to services delivery models. These in turn enable more-seamless management of enterprise content in use cases including user productivity, records management, business processing, content ecosystems and digital transformation.

The representative vendors, inclusion criteria and evaluation criteria we followed for this evolved Magic Quadrant for CSP have been updated significantly. *The lineup and positions of vendors in this*

*Magic Quadrant should **not** be compared directly with the lineup and positions in the 2016 edition of the Magic Quadrant for ECM.*

All vendors in this Magic Quadrant feature a services platform, but there are differences in their platform approaches. Specifically, we recognize two broad platforms types:

1. **Classic content management systems.** Classic repository-based systems come with a complete set of content-related services (see the Appendix). These 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.

Example vendors: Hyland, Laserfiche, Newgen Software, SER Group

2. **Services-led content platforms.** Service-led architectures are "born in the cloud," with agility and flexibility for using and managing unstructured content across diverse content ecosystems, use cases and applications. Vendors in this category optimize around microservices, multiple repositories, logical layers, publicly available APIs and centralized management. The benefits include customization, extensibility and hybrid architectures.

Example vendors: Alfresco, Box, M-Files, Nuxeo

All the vendors in this Magic Quadrant meet our revised inclusion criteria (see the Inclusion Criteria section for details) and support the most common CSP use cases. These use cases include personal and team productivity, records management and compliance, process applications, content ecosystems, and digital transformation/modernization.

Recommendations

Application leaders in charge of content services should:

- Develop a content services strategy that prioritizes content-related functionality to enable digital transformation, and that aligns business needs with the capabilities of the most appropriate CSP.
- Evaluate CSP offerings by first examining the organization's critical use cases and their related functional needs.
- Adopt content practices to address these functional needs by working closely with business users, to enable delivering user-friendly, modern and seamless content experiences.
- Exploit the CSP for business value innovation by segmenting use cases into types that balance (1) the needed level of centralized control and oversight, and (2) the flexibility of ad hoc usage and experimentation.

Use this Magic Quadrant as only one tool in selecting a CSP vendor. 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. A vendor in any one of the four quadrants could be the best choice for your particular needs.

Further Reading

Consult Gartner's companion "Critical Capabilities for Content Services Platforms" research — a detailed comparative analysis that scores competing CSP products against the set of critical differentiators identified by Gartner (forthcoming — due November 2017).

Consider reading Gartner publications that analyze the field of content management more broadly:

- "Reinventing ECM: Introducing Content Services Platforms and Applications" and "What You Need to Know About Content Services Platforms" provide details on our evolving definition of content services and CSPs specifically.
- "Cool Vendors in Content Services, 2017" profiles vendors that are pursuing new approaches to sharing, delivering and using content in intelligent manners.

The content management market is evolving as new processes based on digital information replace traditional processes based on paper documents. Application leaders in charge of a CSP can reimagine content services strategies to define new opportunities for digital transformation, as detailed in "Reinventing ECM: Introducing Content Services Platforms and Applications."

Two other Magic Quadrants focus on specialized content:

- "Magic Quadrant for Web Content Management"
- "Magic Quadrant for Insight Engines"

"Magic Quadrant for Content Collaboration Platforms" could also help, as vendors in this market are increasingly adding lightweight document management capabilities to their productivity and collaboration platforms.

Finally, "Four Steps to Improve Content Services Governance" and "Mitigate the Major Content Services Implementation Risks With Four Actions" advise application leaders in charge of content services to plan strategically for CSP adoption, and assess the right delivery and implementation model for their organization.

Market Overview

The content services platform (CSP) market — formerly tracked by Gartner as "enterprise content management" (ECM) — is marked by big changes, including:

- The rise of a new market leader, OpenText, unseating IBM because of its acquisition of Dell EMC's ECD products (Documentum, Leap and InfoArchive).
- The sale and divestiture of long-term CSP (ECM) products, such as Kofax Perceptive to Hyland and Xerox's DocuShare.

- Increased traction and influence of cloud office and content collaboration platform (formerly enterprise file synchronization and sharing [EFSS]) vendors, which are now competing in the document management business.
- Continued healthy expansion of the market: 8% growth from 2015 to 2016, with global revenue up to \$6.1 billion from \$5.6 billion as content-related processes increasingly are digitized.
- Market concentration of the top three vendors, which account for 43% of the market combined. A group of "Others," comprising over 1,000 vendors worldwide, takes the No. 1 market share slot with 29% of the market.

Gartner expects the CSP market to continue to be dynamic and innovative as well as show growth, even though some other related but newer markets, such as content collaboration platforms, are expected to grow faster.

For additional data on the content services market size and shares, see "Market Share: All Software Markets, Worldwide, 2016."

The importance of these dynamics is reflected in Gartner's decision to restructure its ECM market coverage as content services, which can be aligned with platforms, applications and components (see "Reinventing ECM: Introducing Content Services Platforms and Applications"). This shift is also reflected in the resegmentation of Gartner's quantitative ECM and office suites Market Share and Forecast reports (see the Recommended Reading section below). These reports now align with the way buyers increasingly view office suites, ECM and web conferencing as core building blocks in their digital workplace (see "Update: Gartner to Resegment Its Enterprise Content Management and Office Suites Market Share and Forecast").

Additional research contribution: Karen M. Shegda

Appendix

Content services platforms (CSPs) are the next stage of ECM. Their main functions are characterized by an array of capabilities that include carry-overs from ECM applications as well as new or emerging capabilities exploiting digital technologies. Table 3 lists the primary CSP functions and their representative capabilities.

Table 3. CSP Functions and Capabilities

Function	Capability
Administration	- Audit administration - Device administration - Key management - Policy administration - Rules administration - Scheduling administration - User administration
Analytics	- Content analytics - Process analytics - Reporting - Social analytics - Usage analytics
Capture and recognition	- Mobile capture - Recognition - Scan
Client and user interface	- Adaptive client - Browser-based client - Client management - Content viewers - Desktop client - Mobile client - Productivity suite client integration - Team sites - UCC integration
Collaboration and productivity	- Comments - File sharing - File synchronization - Folder sharing - Folder synchronization - Notes - Social tags and ratings - Task management - Workspace
Content security	- Access control - Audit - Automated content cleansing - Data loss protection - Digital rights management - Download restriction - Encryption at rest - Redaction - Watermarking

Function	Capability
Creation and ingestion	Authoring Bulk ingestion Concurrent authoring Email capture Fax capture File transfer IM capture Natural-language generation Templates Translation Web services capture
Deployment, delivery and publishing	Multichannel publishing Publication rollback Publication scheduling Publishing approval
Document and content management	Annotation Check in/check out Compound documents Renditioning Rich media Versioning File management
Integration	CMIS integration LOB application integration Native integration (APIs) Web services integration
Navigation and search	Enterprise search Federated search Insight engine Media search Metadata taxonomy Native search Natural-language querying Navigation Search visualization
Platform	Authentication Data management High availability Repository
Records and retention	Global policy management Immutability Legal hold Physical records Records Retention

Function	Capability
Routing and processing	Business process management Forms Notifications Process simulation Rules Workflow
Tagging and metadata management	Metadata model Machine-learning-based automatic classification Rule-based automatic classification Security classification Tagging

Source: Gartner (October 2017)

Gartner Recommended Reading

Some documents may not be available as part of your current Gartner subscription.

"How Markets and Vendors Are Evaluated in Gartner Magic Quadrants"

"Reinventing ECM: Introducing Content Services Platforms and Applications"

"What You Need to Know About Content Services Platforms"

"Predicts 2017: Automating and Improving Workers' Content Interactions and Experiences"

"Four Steps to Improve Content Services Governance"

"Mitigate the Major Content Services Implementation Risks With Four Actions"

"Update: Gartner to Resegment Its Enterprise Content Management and Office Suites Market Share and Forecast"

"Cool Vendors in Content Services, 2017"

"Market Share: All Software Markets, Worldwide, 2016"

Evidence

Sources for the analysis in this Magic Quadrant include:

- A Gartner survey of vendors' reference customers, conducted in April 2017, for which there were 100 respondents
- Gartner Market Share research

- Gartner Peer Insights vendor reviews
- Feedback from discussions with users of Gartner's client inquiry service
- Vendors' responses to questionnaires specific to this Magic Quadrant
- Interviews with vendors' customers
- One-on-one briefings with vendors
- 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 Microservice Definition

Gartner defines a microservice as a:

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

Based on a combination of SOA and domain-driven design (DDD), microservice architecture (MSA) is a design paradigm that has three core objectives: development agility, deployment flexibility and precise scalability. Its 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 multiple times a day. MSA also enables them to support web-scale traffic volumes.

Source: "Innovation Insight for Microservices"

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>

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