

Critical Capabilities for Content Services Platforms

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The content services platform market is highly mature, differentiated by the maturity of cloud-first solution options and the applications of AI to content. Application leaders should use this report to navigate beyond vendor marketing and understand differentiating factors for key use cases.

Overview

Key Findings

- The content services platform (CSP) market is highly mature, but the availability of a full-suite CSP in a multitenant SaaS deployment model is still rare.
- The way intelligence capabilities are applied to content is a differentiator for the vendors in this market.
- Microsoft has an outsized influence on the market. Every vendor has a coexistence strategy, but differentiation exists in the robustness and maturity of those strategies and the depth of technical integration with Microsoft products.
- CSP vendors have varying levels of experience integrating with vertical and even departmental applications. Prebuilt, out-of-the-box connectors continue to be rare and specialized.

Recommendations

Application leaders responsible for content services technologies as part of a digital workplace application strategy should:

- Identify key areas of differentiation and value between market offerings by prioritizing key content services use cases using the categories provided in this report.
- Ensure that machine learning capabilities are evaluated on a level playing field by requesting that shortlisted vendors provide a proof of concept built to the organization's use case and content.
- Match their requirements to integrate with Microsoft 365 to CSP vendor capabilities by using the Cloud Office Content Services use-case ranking.

- Assess the integration strategy of potential vendors carefully by identifying if they provide an open API framework, an integration platform as a service (iPaaS) or fully mature, prebuilt connectors.

What You Need to Know

A content services platform (CSP) is a vital part of any organization's content services strategy. CSPs are best aligned with use cases that cover the more formal aspects of how content is used in an organization. As such, CSPs typically provide advanced capabilities for content intelligence, records management, process automation and federation.

This year's report introduces new capabilities and a new use case to focus on differentiation between the vendors in this market. This report analyzes the capabilities of 20 major vendors in the market. It does so by prioritizing, scoring and ranking a set of 10 capabilities (described in the section Critical Capabilities Definition).

The vendors are then further assessed based on how well these capabilities support a set of four use cases, namely:

- Business role hub document management
- Cloud office content services
- Information governance
- Content and process automation

Application leaders should use this research alongside the companion [Magic Quadrant for Content Services Platforms](#) to evaluate vendors' capabilities against the business problems they are looking to solve. Whereas the Magic Quadrant takes a broad view of the vendors' vision and ability to execute, this Critical Capabilities report focuses on just the products and services. It provides a summary of the relevant product modules, individual use-case scores and the highlights and areas of concern for each use case. This report should not be used to compare year-over-year movement of vendor products or services, as our specific critical capabilities and use cases are subject to change on an annual basis.

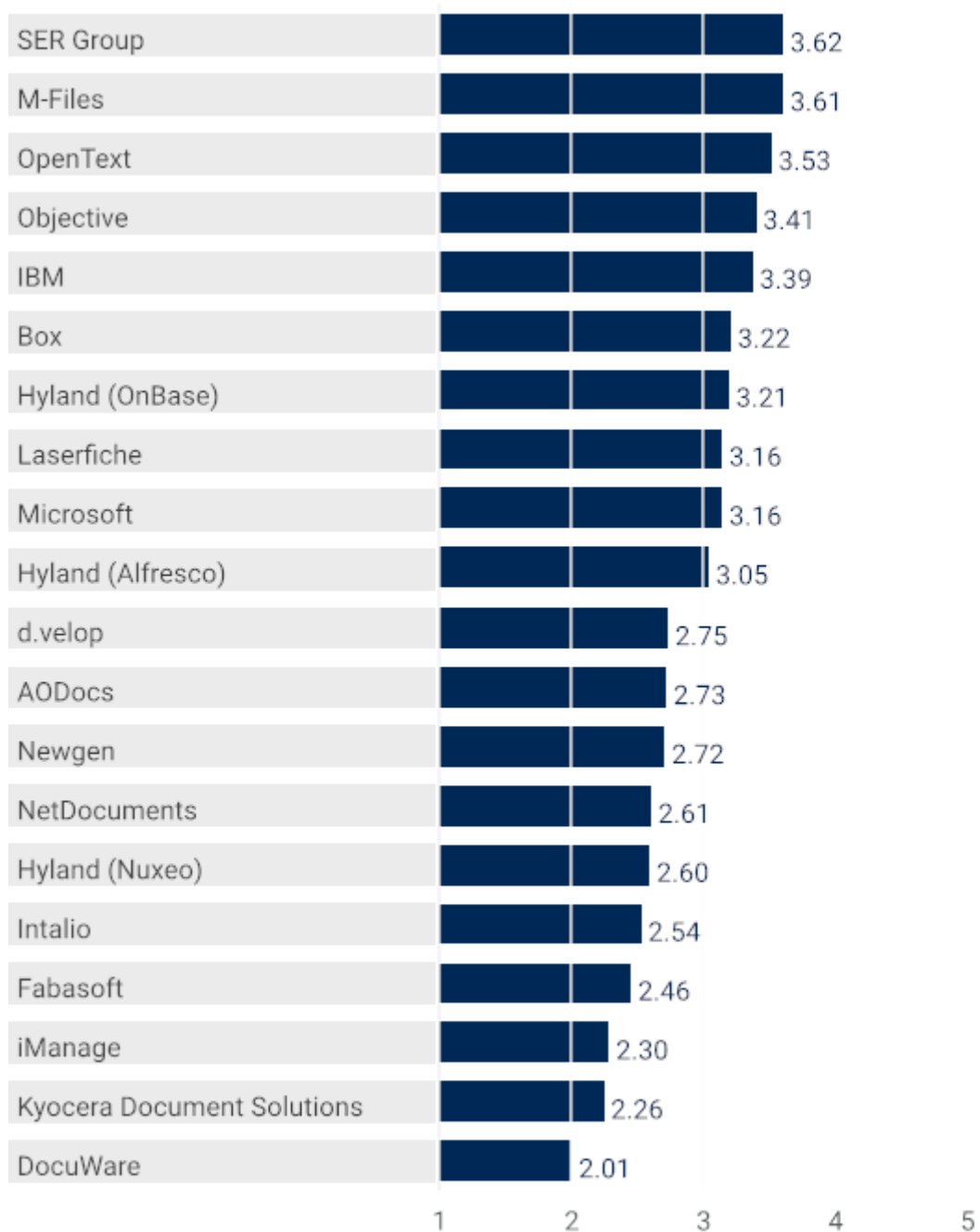
Analysis

Critical Capabilities Use-Case Graphics

Vendors' Product Scores for Business Role Hub Document Management Use Case



Product or Service Scores for Business Role Hub Document Management



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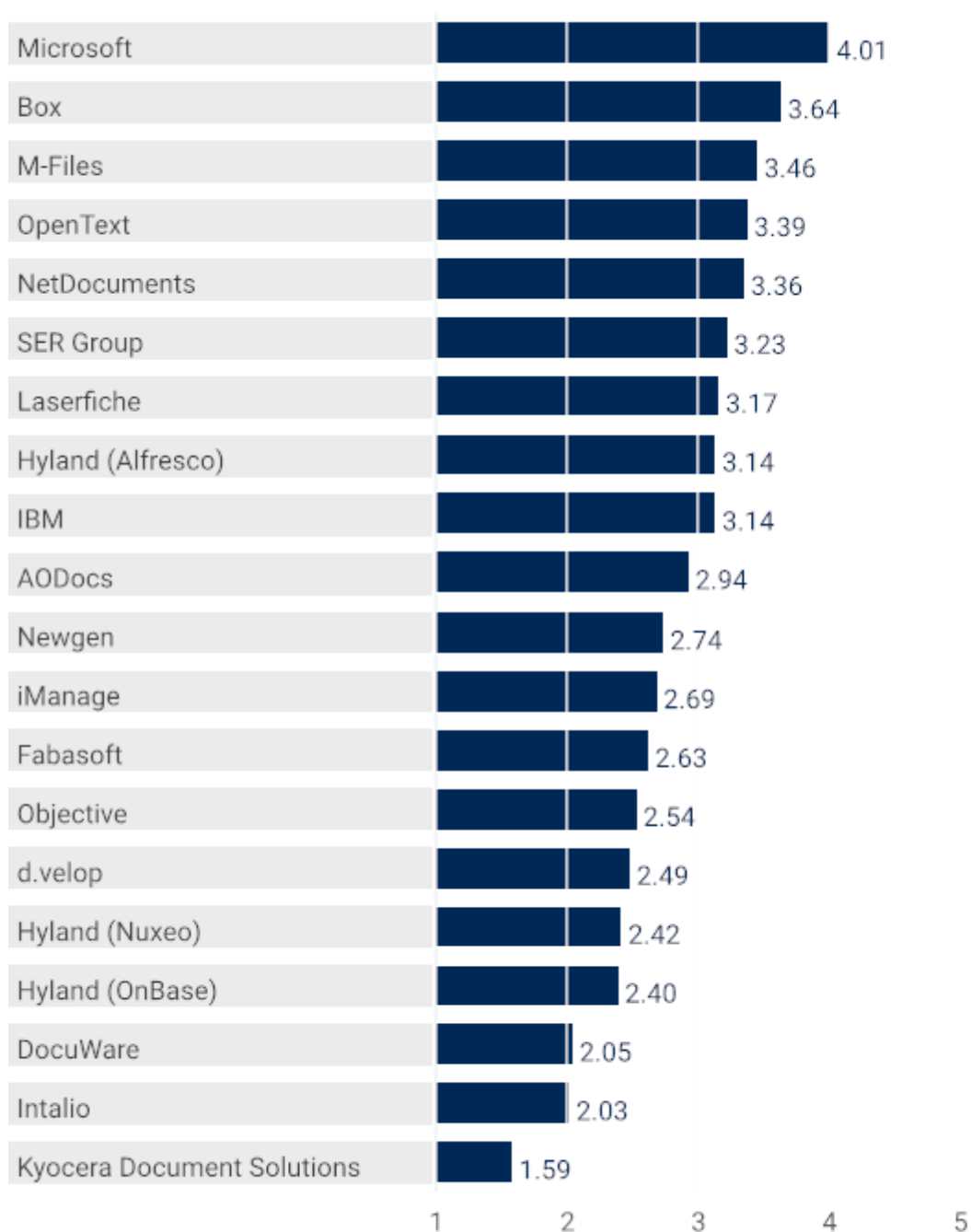
Gartner

Source: Gartner (October 2021)

Vendors' Product Scores for Cloud Office Content Services Use Case



Product or Service Scores for Cloud Office Content Services



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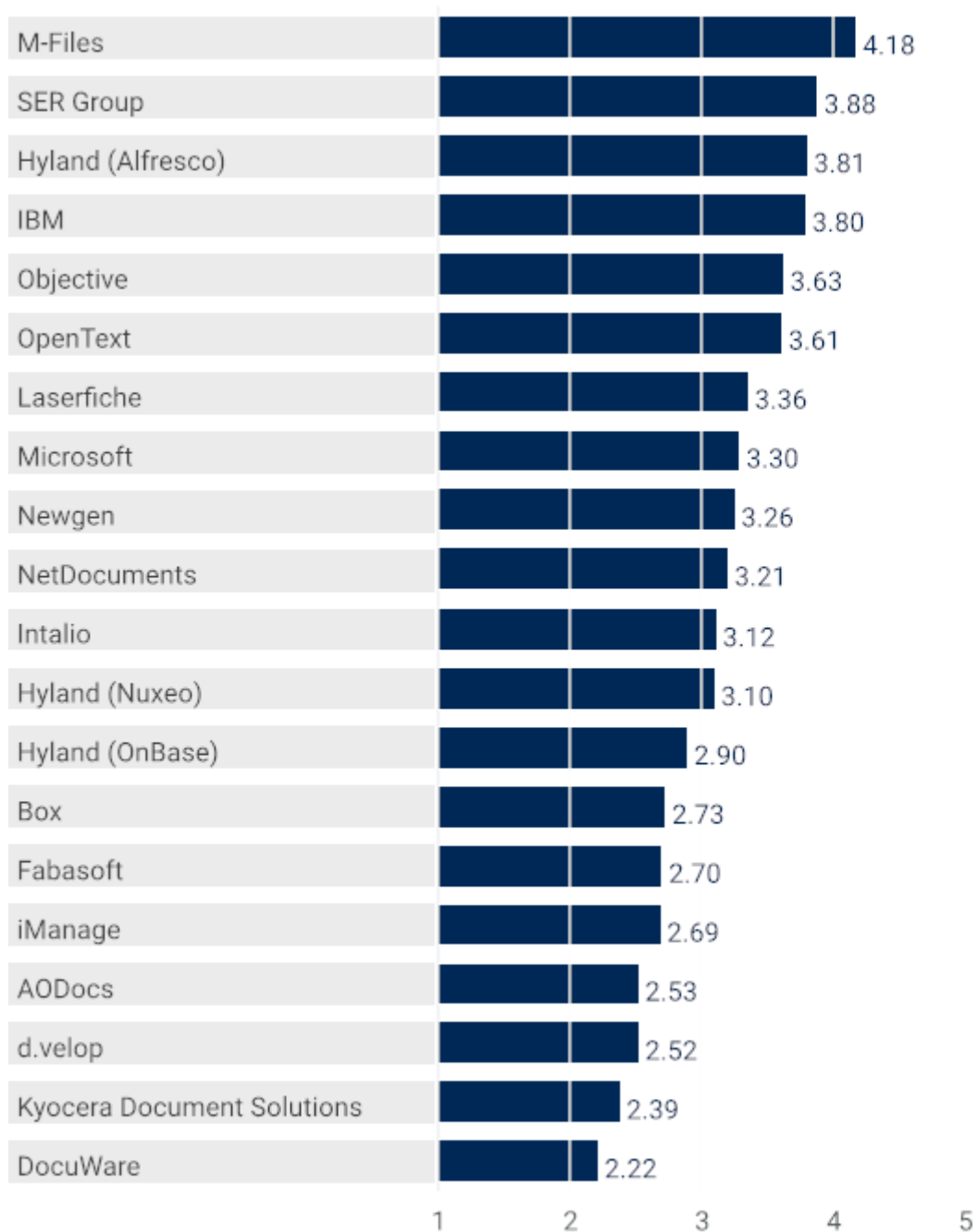
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Vendors' Product Scores for Information Governance Use Case



Product or Service Scores for Information Governance



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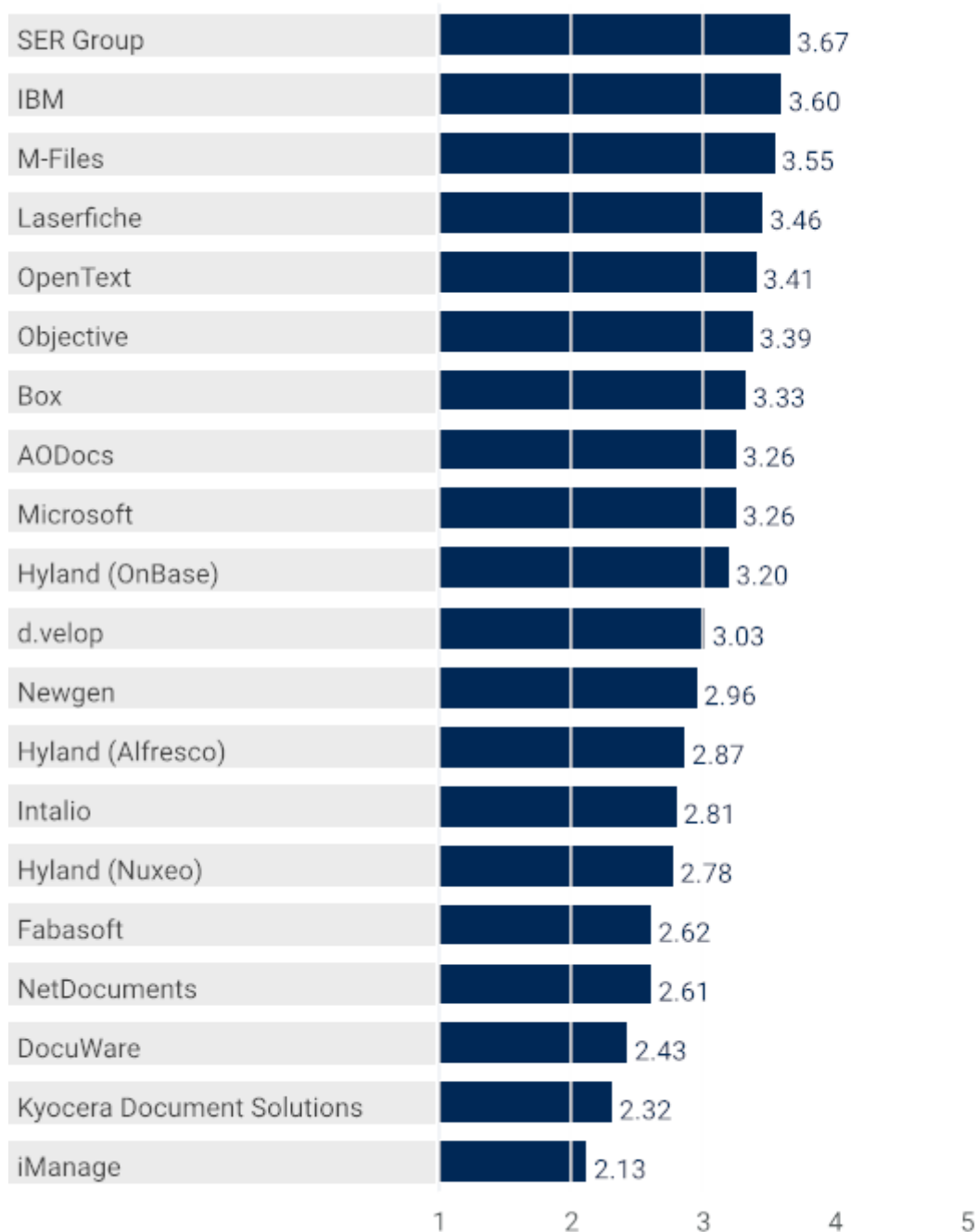
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Vendors' Product Scores for Content and Process Automation Use Case



Product or Service Scores for Content and Process Automation



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Vendors

AODocs

AODocs delivers full CSP functionality on top of Google Drive and Google Cloud Storage, including document library services, metadata, records management and process automation. AODocs provides these to clients primarily as SaaS, although a private cloud option is available on demand.

AODocs provides a good, solid set of capabilities across the use cases for business role hub document management, content and process automation, and cloud office content services. In 2021, the vendor has invested in complex metadata, forms, advanced viewer, mobile applications and document comparison features to expand its capabilities. It provides a modern and highly configurable experience for end users, administrators and implementers. Its primary differentiation and strength is in providing services to organizations that have invested in the Google productivity ecosystem.

Gaps in federation, security intelligence and complex records management features compared to leading competitors in the market mean that the platform ranks in the lower quartile for the information governance use case.

Box

The Box Content Cloud platform consists of capabilities grouped around productivity and collaboration, partner integrations, records management (Box Governance), security (Box Shield and Box KeySafe), platform (Box Platform), workflow (Box Relay), compliance and content residency (Box Zones). The platform is focused on employee- and business-centric collaborative content use cases. Box is a cloud-based multitenant solution.

Box scores best in the cloud office content services use case. Broad integration with cloud office suites, including Microsoft and Google, and an ecosystem of 1,500 partner integrations place emphasis on Box as the content platform of choice for customers who have a cloud-first application strategy. Box's strengths as a cloud content platform lie in its global scaling, including the ability to support large user populations and document libraries. All of this is achieved at cloud scale, with fault tolerance, balancing and storage delivered by the underlying platform.

Box lags in information governance use cases because of a lack of maturity in its governance features, including file plan management and file-level records management, and granular access controls at the document level.

DocuWare

DocuWare is a full content services platform. DocuWare has focused on expanding its administration, configuration and deployment by releasing private cloud deployment and SSO for public cloud, and consolidating configuration features into a single HTML5 client. DocuWare is available to deploy on-premises, in a public or private cloud environment, or as a SaaS solution.

DocuWare struggled to achieve high scores in any use case this year, scoring highest in content and process automation and cloud office content management. DocuWare provides full workflow and capture, along with preconfigured solutions specifically aimed at business administration activities, ideal for clients in the SMB market.

DocuWare does not stand out in our scoring. The lack of native integrations with business role hubs (Workday, SuccessFactors and Salesforce, for example) is particularly challenging, as this is often a key enterprise purchasing driver. Integration with new work hub (NWH) solutions is also

limited compared to peers in the market. There are no integrations with common NWH applications, such as Microsoft Teams, Zoom and others.

d.velop

The d.velop documents platform suite is composed of d.velop documents, d.velop mobile, d.velop document reader, and d.velop enterprise search. Over the last year, d.velop has focused on making improvements to its core capabilities with Microsoft 365 integrations, content collaboration and e-signatures.

D.velop scored highest in the content and process automation use case. D.velop's strength is as an entry-level platform, providing a solid base set of features including line-of-business application integrations with Microsoft Dynamics, Salesforce, SAP and SAP SuccessFactors.

D.velop ranks low in our information governance use case due to its basic records management capabilities, which in particular lacks in terms of holds management, and its limited federation capabilities.

Fabasoft

Fabasoft's content services platform, Fabasoft Business Process Cloud, includes content services and business process automation, as well as enterprise search (Mindbreeze). It is focused on meeting cloud-based document and business process management needs.

Fabasoft's strength lies in its cloud-based document and business process management platform, which provides a low-code environment for configuring and customizing business processes and forms-based applications. Fabasoft eGov-Suite is an application of this technology to digitize public administration.

Fabasoft has started to introduce AI features into contract management and classification applications in its portfolio.

Fabasoft fails to distinguish itself against the more mature vendors in the marketplace across the critical capabilities of business role hub connectors, federation and productivity intelligence. Fabasoft scored worst in the business role hub document management use case as a result.

Hyland (Alfresco)

Hyland's Alfresco Digital Business Platform is composed of Alfresco Content Services, Alfresco Governance Services, Alfresco Process Services, Alfresco Process Automation, Alfresco Search and Insight Engine, and Alfresco Federation Services. Alfresco offers on-premises, private cloud and platform as a service (PaaS) deployment options.

Over the last year, Hyland's focus with Alfresco has been to define a strategy for the platform in relation to OnBase and Nuxeo.

Alfresco ranks highly for the information governance use case, displaying strength in content consolidation and in-place records management. The platform's strength in records management

and Alfresco's federation capabilities provide organizations with the ability to centralize content or records management functionality.

Alfresco remains very limited in the business role hub use case. The platform provides only a few direct integrations with line-of-business applications, namely Salesforce, SAP and Workday.

Hyland (Nuxeo)

Hyland's Nuxeo Platform is composed of Nuxeo Platform, Nuxeo Studio, Nuxeo Insight, Nuxeo Mobile, Nuxeo Drive and Nuxeo Federation Framework. Over the last year, the focus for Nuxeo has been on improving its AI capabilities. Nuxeo offers on-premises, private cloud and PaaS deployment options.

Nuxeo ranks at the bottom in all use cases in this report. This is mostly driven by its lack of a SaaS strategy. The Nuxeo platform also has the fewest line-of-business application integrations, only integrating with Salesforce. The platform also lacks integrations with Google personal productivity tools.

Nuxeo's strength is in its platform being based on MongoDB and NoSQL. This makes it a strong option for organizations looking to support billions of documents. Their primary use case is for marketing organizations, especially as it relates to rich-media content, which is not a focus of this report.

Hyland (OnBase)

Hyland's content services platform is the OnBase platform. Over the last year, Hyland released Hyland RPA and intelligent capture as a managed service. OnBase is available for on-premises or private cloud deployment.

OnBase scored strongest in the business role hub use case. While its purpose-built integrations with common line-of-business applications are limited to Salesforce, SAP and Workday, it does have industry connections in healthcare with Epic and in insurance with Guidewire and Duck Creek. The platform has screen-level integration, data-level integration tools and APIs for coding custom solutions.

The lack of a mature SaaS deployment option negatively impacted the scoring for OnBase in all use cases. OnBase also struggles to differentiate itself from the rest of the market in productivity, content and security intelligence capabilities.

IBM

IBM's Cloud Pak for Business Automation platform includes document management (IBM FileNet Content Manager), records management (IBM Enterprise Records), process automation (IBM Business Automation Workflow), automation reporting (IBM Business Automation Insights), content intelligence (IBM Business Automation Document Processing) and intelligent document capture (IBM Datacap). The platform is focused on business-centric automation, information governance and archiving use cases. IBM provides deployment options for on-premises, private and public cloud, hosted managed services, and SaaS.

IBM scores best in our content and process automation use case. The platform's strength as a business automation platform lies in its integration and scaling of business process management with content services. This can be achieved at a large scale for enterprise customers who value a vertically integrated stack that includes infrastructure, database and content services platform. IBM's strength as a content services platform lies in its ability to scale to billions of objects.

While IBM has a broad and comprehensive set of capabilities, it lacks multitenant SaaS delivery, which is a key market driver. In addition, IBM's collaboration capabilities are rated as weak, including integration with cloud office technologies. These factors mean that IBM struggles to compete with cloud-first content service platforms with strong integrations with cloud office and NWH applications.

iManage

The iManage Work platform is composed of iManage Work, iManage Share, iManage Drive, iManage Security Policy Manager, iManage Threat Manager, iManage Records Manager, iManage New Business Intake, iManage Conflicts Manager, AI-based iManage Insight and iManage Extract, and iManage Closing Folders. iManage continues to focus on solutions where case work is the primary use case. In addition, iManage Work is available as a SaaS platform.

The use case in which iManage scored best is cloud office content services. Highlights here included integration with Microsoft Teams, which preserves the context of the iManage workspace in the team/channel and supports web-based Microsoft Office clients. This is alongside the long-standing, rich Outlook integration, which provides simple and intelligent email classification.

iManage performs poorly in comparison to other CSP providers in the content and process automation use case due to its basic and legal industry-specific workflow capabilities. It is also limited in the business role hub document management use case due to its limited number of general enterprise application integrations.

Intalio

Intalio provides a full set of CSP capabilities across a range of products, including Intalio Document, Record, Case, IAM, Mobility, AI & Cognitive Services, Dashboard & Reporting Services and Data Integration. It is available as software or a private cloud service.

Intalio scored best in the information governance and content and process automation use cases. This ranking is supported by its strong set of BPM-type capabilities, including forms and workflow templates. Intalio also has strong content intelligence capabilities, with cognitive analysis applied to both text and rich media content sources.

Intalio struggles to differentiate itself from longer-standing, globally focused competitors in the market on the other use cases, which are integration-focused (cloud office content services and business role hub document management). Here, Intalio lacks integration with major line-of-business applications, such as SAP and Salesforce. In addition, its Microsoft 365 integration is more limited than other options on the market, particularly with regard to Microsoft Teams.

Kyocera Document Solutions

Kyocera provides a full set of CSP capabilities from two products within their portfolio: yuuvis and Eversuite. Yuuvis provides the standard formal document management and process services, while Everteam Policy and Everteam Discover provide information governance and federation services. Yuuvis is available for deployment as software or SaaS. Eversuite is available as software or a hosted service.

Kyocera scored highest for the information governance use case. Its combination of federation services and strong records management capabilities in the Eversuite platform are comparable to other solutions in the market. However, it is disconnected from the rest of the vendor's CSP offering, which is provided by yuuvis and is not integrated.

Kyocera struggles to differentiate itself in any of the use cases covered in this analysis. Its features generally lag behind leading competitors in the market, and a lack of a cohesive vision in how the products and services combine means that Kyocera scores in the bottom quartile for all cases.

Laserfiche

The Laserfiche content service platform includes core content services, multichannel capture, information governance, records management, intelligent process automation, collaboration and business application integrations. Laserfiche can be deployed as multitenant SaaS, on-premises or a hybrid.

The Laserfiche platform scores best in the content and process automation use case. The platform includes business process design, workflow, forms and reporting/dashboarding. The integration and ease of configuration of these business automation tools make them a stand-out feature of the Laserfiche platform. Templated business applications offer customers a set of off-the-shelf applications that can help to improve time to value.

Laserfiche has introduced new integrations with Microsoft 365 products, including Teams, SharePoint and Outlook, which improve support for collaborative use cases.

Laserfiche lags in some collaborative features, such as desktop file synchronization and sharing, which weakens its use in collaborative employee-centric use cases.

M-Files

The M-Files Online suite is composed of content services, workflow, records management and federation services. M-Files made a major investment in acquiring Hubshare to offer a best-in-class external file sharing experience to the market. M-Files Online is available on-premises, in private or public cloud and as a multitenant SaaS solution.

M-Files leads the market in two use cases. It ranked highly in federation and smart metadata, enabling it to score first in the information governance use case and second in the business role hub document management use case.

M-Files scored well across all use cases, but it provides fewer integrations with major enterprise applications than leading peers. Additionally, M-Files is built to deploy primarily as a departmental or small enterprise solution, and is not intended for large enterprise storage and archiving use cases.

Microsoft

SharePoint is the content services platform for all of Microsoft 365 E5. Additional services include Power Automate (task automation), OneDrive (content collaboration) and Teams (workstream collaboration). Microsoft has expanded its portfolio with the general availability of SharePoint Syntex and Viva Topics. Microsoft 365 is available as a multitenant SaaS tool.

Microsoft continues to lead the field for clients looking to address the cloud office content services use case. Strong capabilities in security intelligence, SaaS deployment and content collaboration bolster Microsoft's standing in that use case.

Microsoft has not significantly improved its scoring in capabilities such as business role hub connectors, federation and content intelligence. Microsoft 365 would not be a common choice for organizations looking to store documents from SAP or other leading business role hubs. Additionally, use cases that have high-volume image ingestion and processing, such as claims or mortgage application processing, are not commonly served by SharePoint.

NetDocuments

The NetDocuments ORGANIZE suite is the core of the NetDocuments cloud platform, which includes content services and records management, PROTECT for advanced security, PLAN for process automation and DELIVER for content collaboration. NetDocuments has made enhancements over the last year in achieving FedRAMP compliance, enhanced content collaboration capabilities and deeper integration with the Microsoft 365 suite. NetDocuments is a SaaS solution.

NetDocuments scores best in the cloud office content services use case, driven by its score for productivity intelligence, its NDMail integration with Exchange and Gmail, and its integration with Microsoft 365 services like Teams and Power Automate.

NetDocuments struggled to stand out in a majority of our use cases. The vendor is attempting to expand its heritage focus on legal document management. However, it continues to have middling scores for capabilities such as productivity intelligence, process and automation, and business role hub connectors.

Newgen

Newgen's OmniDocs Contextual Content Services Platform is composed of OmniDocs Contextual Content Services Platform, iBPS, Records Management System and CognIt. Over the last year Newgen's focus has been on improving its cloud platform, low-code and AI capabilities. Omnidocs is available for on-premises deployment, public cloud or multitenant SaaS.

Newgen's process automation capability is strong, but more developer-focused than others in the market. It provides some capabilities in predictive indexing, document assembly and bots for task automation. However, even its low-code platform is more developer-focused than end-user-focused.

One of Newgen's strengths is its out-of-the-box solutions for many common business applications. Newgen has a content services application for contract life cycle management, e-invoicing, HR document management and legal document management.

Objective

Objective is focused on capabilities grouped around content management (Objective ECM), governance and records management (Objective Inform), NWH integration (Object GOV365), external collaboration (Objective Connect) and workflow (Objective Perform). Objective is available for on-premises, private hosted cloud or public cloud deployment.

Objective's strength as a governance and records management platform lies in its support for advanced records management use cases, including file plans, policy inheritance, disposition rules, metadata-driven rules and security. This is particularly useful to records-centric business processes in national and local government, where regulations require advanced controls.

Objective's integration with Microsoft's M365 platform is a leader in the industry. Objective supports file sharing, federation, in-place records management and conversational archiving for Microsoft M365's collaboration tools. This makes Objective a good choice for public-sector organizations requiring both collaboration and records management to be integrated with the Microsoft platform.

Objective scores worst in our cloud office content services use case. While Objective has a mature set of content management and governance capabilities, it currently lacks a strong multitenant SaaS option, which is a key market driver.

OpenText

OpenText has a large portfolio of content services products. Its content cloud branding covers a range of products, including OpenText Extended ECM Platform (inclusive of Content Suite Platform), Core Content and Documentum. These products provide a broad set of capabilities covering document management, records management, collaboration workflow, capture and content analytics. Extended ECM and Documentum are available as software or hosted solutions. Core Content is a SaaS offering.

OpenText scores in the upper tier for all use cases covered in this analysis. Its highest ranking is for the business role hub document management use case. The strength of its integration with common enterprise integrations supports this positioning. This strength in integration is apparent in the cloud office content service use case, thanks to its strong integration with Microsoft 365.

While scoring well across all use cases, OpenText scores less well than other competitors for a number of critical capabilities where the vendor's solutions are not market leaders. These include

federation, content intelligence and productivity intelligence.

SER Group

SER Group's Dosis4 is based on Dosis4 Content Services for on-premises or hosted deployment and DOXIS4CLOUD Content Services for cloud deployment. These platforms are composed of Dosis4 Content Services, Dosis4 Process Services and Dosis4 Cognitive Services at its core CSB. The Dosis4 iRoom enables internal and external collaboration, while Dosis4 Federation Service makes external content available in Dosis4. SER's focus for the last year has been on UI, email and line-of-business application integration.

SER Group scored highly in the business role hub, information governance and process automation use cases. The workflow engine can trigger tasks and workflows in line-of-business applications. Its SmartBridge strategy provides a standard set of APIs for integrating with line-of-business applications.

SER has its lowest score in the In the cloud office use case. This is primarily driven by a low score for productivity intelligence. SER will need to improve its strategy for nudge tech features, such as proactively suggesting actions or content to a user based on their role and the context of their work.

Context

The market for content services platforms (CSPs) continues to move toward cloud-first technology options, with differentiated capabilities being delivered by vendors to support line-of-business problems out-of-the-box. These products have traditionally been used for operational, imaging-centric use cases, which Gartner describes as "digital-business-centric," or even archiving. However, the shift to support human-centric hybrid work patterns has accelerated a change in strategy.

Cloud deployment options are now a primary consideration in solution scoring. Most established vendors have begun to provide some multitenant or hosted solution. But in many cases, they do not yet have feature parity with the legacy on-premises platforms. New cloud-first entrants also often lack maturity in areas such as records management or workflow and automation. Tools in this space are being modernized, but few vendors offer a complete solution for all use cases.

The four use cases rated in this document are important benchmarks for the breadth of each platform. They span the classic content and document management use cases, as well as new hybrid work use cases. They were selected because they are the most common reasons organizations choose to purchase and implement CSP technologies (based on interactions with Gartner clients during inquiry).

Note that this report should not be used to compare the year-over-year movement of vendor products or services, as the critical capabilities and use cases are subject to change each year.

There is still significant room for differentiation in this market in the areas of content intelligence, productivity intelligence, security intelligence and multitenant deployment.

Additionally, vendors are taking different approaches to the way they integrate with the rest of your application portfolio. In some cases, they have acquired or developed an integration platform as a service (iPaaS) capability. In other cases, they are developing prebuilt connectors. In yet other cases, they depend on third-party developers for those connectors.

In this year's report, it is apparent that the ranking of vendors can differ considerably depending on the use-case focus. Where records management and privacy concerns are the highest priority, for example, in the information governance use case, particular vendors rise toward the top of the rankings. This would indicate that these vendors are more appropriate for organizations for which compliance is a primary concern.

Conversely, where collaboration and supporting hybrid work patterns are a focus, a different set of vendors appear at the top of the list. When selecting CSP technologies, application leaders should focus on the priorities for their organization and use this report to determine how well products meet those objectives.

Product/Service Class Definition

In broad terms, a modern CSP should display the following characteristics:

- **Cloud scale:** The ability to scale up and out to meet demand and provide seamless connectivity to a broad ecosystem of suppliers, partners and customers while delivering continuous innovation.
- **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.
- **Short time to value:** The ability to deliver business value quickly. This can be achieved in several ways, including by providing prebuilt applications and citizen-developer-based tooling to quickly realize business value and provide ongoing flexibility.
- **User centricity:** A “consumerized” user experience with embedded mobility and consistency across devices. A focus on overall user experience is of paramount importance to drive adoption and realize the expected benefits of this technology.
- **Intelligence:** Advances in artificial intelligence techniques, including machine learning and deep neural networks, have enabled innovations for content-rich systems, specifically in 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. These characteristics can be implemented in many different ways by product features, additional services and the messaging that is delivered to the market.

Critical Capabilities Definition

Records Management

Records management covers the features that enable an organization to be compliant with regulatory and organizational mandates.

It includes certification with international standards and formal controls for long-term content preservation.

Process Automation and App Dev

The most basic feature of workflow and process is typically ad hoc task assignment, which can be used in an approval-type process.

More advanced features enable authorized users to create flows and UIs (represented as forms) suitable for end users to utilize for any number of business processes.

Security and Privacy Intelligence

Standard security and privacy controls enable the organization to provide role-based access across a variety of endpoints. Advanced capabilities proactively identify, classify and control sensitive content.

Content Intelligence

Content intelligence is a set of capabilities that enable content classification, metadata augmentation, integration of computer vision and natural language processing to provide content understanding without requiring manual intervention.

Productivity Intelligence

Productivity intelligence is primarily focused on anticipating the needs of users and prompting them to take the next best action.

This is enabled by task management and graph technology across a platform used to identify similar work patterns and suggest or push content to users proactively.

Advanced capabilities enable the ability to link content across files, sites and conversations based on common themes or entities without human intervention.

NWH Connectors

New work hub (NWH) connectors cover the breadth and depth of the CSP's integration with productivity applications.

These include workstream collaboration, meeting solutions, email and calendar, collaborative work management and content collaboration tools.

Business Role Hub Connectors

Business app connectors focus on the breadth and depth of the CSP's integration into line-of-business applications.

These include enterprise resource planning, customer relationship management and human resources management.

Federation

The ability to extend content services such as security, search and records management to external content systems via prebuilt connectors, and to manage content objects in place.

Content Collaboration

The ability to support internal and external collaboration activities via secure, consumerized sharing services.

Paas/SaaS Deployment

Content services deployed as an evergreen, cloud-based set of capabilities.

Use Cases

Business Role Hub Document Management

Integration with line-of-business applications that are in common use across organizations. Examples include integration with sales, human resources and procurement.

Cloud Office Content Services

Organizations that use cloud office suites are looking to augment them with document management, messaging and automation with the robust services available from CSPs.

Cloud office suites will often provide a “single pane of glass” through which end users can access and collaborate on documents, regardless of where they are stored. CSPs will provide the records management, process automation and federation capabilities needed to support this use case.

Information Governance

Where a CSP acts as a secure corporate repository to support corporate policy requirements for records management, privacy, security and compliance.

Information governance combines the ability to support policy creation, execution, management and any necessary audit capabilities. Traditionally, this capability has been driven by records management and archiving. Moving forward, it will be matched by increasing pressure to provide better support for privacy and security.

Content and Process Automation

Core automatic document processing, including new account onboarding, loan processing, claims processing, underwriting and work order management.

Vendors Added and Dropped

Added

- Fabasoft has been added to the Critical Capabilities report this year. It last qualified for inclusion in 2018, but failed to meet geographical inclusion criteria in subsequent reports.
- D.velop and Intalio have qualified for the Critical Capabilities report for the first time this year. They have been included as honorable mentions in previous reports.

Dropped

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

Inclusion Criteria

The inclusion criteria for this Critical Capabilities research are the same as the companion [Magic Quadrant for Content Services Platforms](#), which assessed 18 vendors, all of which met the following inclusion criteria.

Market Presence Criteria

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

- **Offering:** Vendor has a generally available CSP offering for enterprise that is being actively marketed to new clients and must be available as a separately billed, stand-alone product. The product must have been generally available before 1 May 2021.
- **Revenue:** Vendor must have at least \$20 million in total revenue derived from CSP sales in 2020, *or* have a demonstrated revenue growth rate of 25% from 2019 to 2020 *and* at least \$10 million in total revenue from CSP sales in 2020.
- **Total users:** As of 1 May 2021, there must have been at least 200,000 active paid users among all organizations that are licensed to use the content-services-related product.
- **Installed base:** The current installed base as of 1 May 2021 must meet the following criteria:
 - The total number of customer organizations with paid for, active, content-services-related deployments must be higher than 500
 - There must be at least 50 deployments which have over 500 seats
- **Geography:** The vendor must have an active presence in at least three major regions. "Active presence" is defined as having at least 10% of revenue billable in a single region outside of the primary territory and a further 5% of revenue billable in a third territory. Major regions are defined as:
 - North America
 - Europe

- Middle East and Africa
 - Asia/Pacific
 - Latin America
- **International commitment:** The vendor's main CSP product offering must include an internationalization framework for the user experience that allows it to be presented in different languages. The product must also be available in at least three different languages.
 - **Presence as a foundational platform:** The market definition describes CSPs as "the foundational component in an organization for the management and utilization of content." Therefore, the vendor must confirm that its product is applicable to a broad range of use cases. For the purposes of this Magic Quadrant, that is defined as:
 - At least 20% of the vendor's CSP customer deployments must be in a secondary area of business activity. A business activity is a common topic area and can be a combination of corporate and vertical activity (for example, support for corporate HR and recruitment industry companies, or engineering departments and engineering organizations, is all counted as a single business activity).
 - **PaaS/SaaS offering:** The vendor must have a SaaS/PaaS version of the product available with at least 1,000 active monthly users on the PaaS/SaaS platform as of 1 May 2021. The Gartner definition of SaaS and PaaS are included below. However, please note that, for the purposes of this market evaluation, services that are private instances hosted in a tailored fashion specifically for an individual client should not be included in this count.
 - **Market traction:** The vendor must have sold and implemented their CSP product (that meets the functional inclusion criteria below) to at least 10 new (net new clients to the vendor) clients in the period between May 2020 and May 2021.

Functional Criteria

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

- **Content repository:**
 - Large-scale content repository capable of storing tens of millions of content objects and related metadata in a single customer instance
 - Ability to store all content types, regardless of format
- **Document and content management library services:**

- Ability to upload content and create new content from scratch within the platform
- Native document management capabilities that allow users to work directly on content stored in the platform, with facilities to check content in/out and create new versions
- Ability to track and maintain version history
- Provision of templates for the creation of new content
- **Records management:**
 - Ability to create and manage retention policies that define how long content is retained when it gets to a certain state
 - Ability to automate deletion of content when it exceeds its defined retention period
 - Ability to lock content and metadata, making it immutable when it has reached a given state
 - Ability to automate the application of retention policies based on classification, location or metadata state
- **Open APIs:**
 - A REST-based API, available for consumption by customers, that provides access to the majority (more than 70%) of core product features
- **Security and privacy controls:**
 - Ability to apply and maintain granular levels of security, including create read, update, delete and download
- **Metadata:**
 - Ability to define and apply metadata models for specific content types
 - Ability to define different types of metadata, including text, numeric, date and boolean data
 - Ability to apply ad hoc metadata tags to content
 - Ability to enforce different controls on metadata completion, including look-ups from predefined lists and making certain metadata mandatory
- **Search:**
 - Ability for end users to perform a full text search for text that might occur anywhere within content stored in the system

- Ability for end users to perform a metadata search
- Collaboration:
 - Ability to synchronize content with a local device for accessing remotely and while offline
 - Ability to share content with internal and external recipients from the UI
 - Ability to provide synchronous or asynchronous comments on the content
- Enterprise administration:
 - A unified administration console that allows administrators to manage users, groups, roles, and general system performance and capability parameters
 - Ability to integrate with enterprise directory information services for user/group/role/security management (must include general LDAP and Active Directory support)
 - Support for single sign-on (SSO)
- Reporting:
 - Ability to define and run reports that describe system usage
- Mobility:
 - A mobile client available on both iOS and Android platforms that provides access to basic document management capabilities.

Table 1: Weighting for Critical Capabilities in Use Cases

Critical Capabilities ↓	Business Role Hub Document Management ↓	Cloud Office Content Services ↓	Information Governance ↓	Content and Process Automation ↓
Records Management	5%	0%	28%	0%
Process Automation and App Dev	17%	5%	11%	34%

Critical Capabilities ↓	Business Role Hub Document Management ↓	Cloud Office Content Services ↓	Information Governance ↓	Content and Process Automation
Security and Privacy Intelligence	7%	15%	14%	4%
Content Intelligence	9%	2%	14%	22%
Productivity Intelligence	0%	17%	0%	6%
NWH Connectors	5%	35%	5%	0%
Business Role Hub Connectors	29%	0%	5%	18%
Federation	12%	5%	23%	0%
Content Collaboration	6%	5%	0%	4%
Paas/SaaS Deployment	10%	16%	0%	12%
As of 15 October 2021				

Source: Gartner (October 2021)

Critical Capabilities Rating

Each of the products/services that meet our inclusion criteria has been evaluated on the critical capabilities on a scale from 1.0 to 5.0.

Table 2: Product/Service Rating on Critical Capabilities

Critical Capabilities ↓	AODocs ↓	Box ↓	d.velop ↓	DocuWare ↓	Fabas
Records Management	3.0	3.0	2.0	3.0	3.0
Process Automation and App Dev	3.7	3.0	3.5	3.0	3.0
Security and Privacy Intelligence	2.7	3.8	2.5	2.0	3.0
Content Intelligence	3.2	3.0	3.0	2.8	3.0
Productivity Intelligence	3.0	3.0	2.5	1.0	1.0
NWH Connectors	2.5	4.0	2.0	2.0	3.0
Business Role Hub Connectors	2.0	3.5	2.5	1.0	1.5
Federation	1.0	1.0	2.5	1.0	2.0
Content Collaboration	4.2	4.3	3.0	2.0	3.3

Critical Capabilities ↓	AODocs ↓	Box ↓	d.velop ↓	DocuWare ↓	Fabas
Paas/SaaS Deployment	4.0	4.3	3.0	3.3	3.0
As of 15 October 2021					

Source: Gartner (October 2021)

Table 3 shows the product/service scores for each use case. The scores, which are generated by multiplying the use-case weightings by the product/service ratings, summarize how well the critical capabilities are met for each use case.

Table 3: Product Score in Use Cases

Use Cases ↓	AODocs ↓	Box ↓	d.velop ↓	DocuWare ↓	Fabasoft
Business Role Hub Document Management	2.73	3.22	2.75	2.01	2.46
Cloud Office Content Services	2.94	3.64	2.49	2.05	2.63
Information Governance	2.53	2.73	2.52	2.22	2.70
Content and Process Automation	3.26	3.33	3.03	2.43	2.62
As of 15 October 2021					

Source: Gartner (October 2021)

To determine an overall score for each product/service in the use cases, multiply the ratings in Table 2 by the weightings shown in Table 1.

Critical Capabilities Methodology

This methodology requires analysts to identify the critical capabilities for a class of products or services. Each capability is then weighted in terms of its relative importance for specific product or service use cases. Next, products/services are rated in terms of how well they achieve each of the critical capabilities. A score that summarizes how well they meet the critical capabilities for each use case is then calculated for each product/service.

"Critical capabilities" are attributes that differentiate products/services in a class in terms of their quality and performance. Gartner recommends that users consider the set of critical capabilities as some of the most important criteria for acquisition decisions.

In defining the product/service category for evaluation, the analyst first identifies the leading uses for the products/services in this market. What needs are end-users looking to fulfill, when considering products/services in this market? Use cases should match common client deployment scenarios. These distinct client scenarios define the Use Cases.

The analyst then identifies the critical capabilities. These capabilities are generalized groups of features commonly required by this class of products/services. Each capability is assigned a level of importance in fulfilling that particular need; some sets of features are more important than others, depending on the use case being evaluated.

Each vendor's product or service is evaluated in terms of how well it delivers each capability, on a five-point scale. These ratings are displayed side-by-side for all vendors, allowing easy comparisons between the different sets of features.

Ratings and summary scores range from 1.0 to 5.0:

1 = Poor or Absent: most or all defined requirements for a capability are not achieved

2 = Fair: some requirements are not achieved

3 = Good: meets requirements

4 = Excellent: meets or exceeds some requirements

5 = Outstanding: significantly exceeds requirements

To determine an overall score for each product in the use cases, the product ratings are multiplied by the weightings to come up with the product score in use cases.

The critical capabilities Gartner has selected do not represent all capabilities for any product; therefore, may not represent those most important for a specific use situation or business

objective. Clients should use a critical capabilities analysis as one of several sources of input about a product before making a product/service decision.

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