

# Magic Quadrant for Document Management

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Document management tools are a foundational technology deployed by enterprises to enable and automate content-centric activities. Application leaders should consider document management solutions for a wide range of collaborative and operational content purposes.

## Market Definition/Description

Gartner defines document management as the tools and practices used to capture, store, process, and access documents and content in support of personal, team and enterprise needs. It is used for a wide range of collaborative and operational purposes, enabling the digital workplace, content collaboration, content-centric processes, content services for enterprise applications and content governance. Gartner estimates that 70% to 80% of enterprise information is unstructured, posing a significant challenge for organizations that must unlock the potential and mitigate the risks of content. Document management tools are critical to enterprise application strategies that need to support unstructured information or content.

Document management tools are general-purpose platforms for managing content that help users in a variety of ways:

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- Business professionals who use documents to enable content-centric business processes use document management to support workflow automation and task management.
- Business professionals using enterprise applications like CRM, ERP, human capital management (HCM) and supply chain management (SCM) use documents in the flow of work. Document management sits invisibly behind these applications.
- Records managers and administrators responsible for controlling the retention and disposal of business-critical information use document management tools to maintain compliance with regulatory requirements and company policy.

Document management tools are a packaged collection of component content services that can be configured to suit specific business needs. They can be found as components of digital workplace suites like Microsoft 365 and Google Workspace. They are often used as foundational platforms for building business solutions. This means they may compete with adjacent markets for content service applications like digital asset management and contract life cycle management, which are prepackaged experiences tuned to departmental and industry business needs. Deciding between a general-purpose document management tool and a packaged application is a key choice for buyers.

Vendors may offer content service components found in adjacent markets to support document management, including:

- Electronic signatures
- Intelligent document processing
- Artificial intelligence
- Automation
- Enterprise search services

Some vendors offer a complete suite of tools. However, best-of-breed approaches are

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include encryption; sovereign storage; storage tiering; on-premises storage; cloud storage; file system storage; content-addressable storage; database storage; and write-once-read-many (WORM) storage.

- **Metadata** services describe content using summary data. Simple systems have read-only system metadata, but more sophisticated services support document classification, user-defined types and attributes using industry-standard metadata models.
- **Search** services find content based on metadata or the full text of documents. Search tools use natural language processing to create an inverted index or more advanced vector embeddings. Many systems support faceted search, which can filter results based on metadata.
- **Library and repository** services organize and index collections of documents. Library services provide facilities to check content in and out, and to track and maintain version history. Some solutions support complex relationships between content such as renditions. These features are tightly integrated with content storage, metadata, search, governance and security services. Advanced library services include support for templates.
- **Security and protection** services prevent unauthorized access and changes to content and metadata with role-based access control. Advanced features provide endpoint protection, data-loss prevention and security classification.
- **Digital workplace integration** ensures documents can be used in digital workplace suites which include collaborative work management, workstream collaboration, meetings, intranets and collaborative document editing.
- **Information governance** services classify, preserve, and dispose of content according to operational and legal needs. This includes retention policies that determine the lifetime of content; content classification to support personally identifiable information (PII) and Health Insurance Portability and Accountability Act (HIPAA); record administration; and, in advanced cases, support for complex records standards.

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viewing services on web and mobile devices. Some provide native support for devices and operating systems like file sync and share services.

- **API and integration services** enable customized integration with other applications for a wide variety of content-centric use cases. Integration services interfaces include command line interfaces, language framework software development kits (SDKs), web services and batch interfaces. Some vendors support standards such as secure file transfer protocol (SFTP), WebDAV and Content Management Interoperability Services (CMIS).
- **Collaboration** services help employees and third parties work together on content. Collaboration services include support for team workspaces, synchronized content across devices, support for real-time coauthoring and collaborative editing, integration with digital workplace suites, and support for external collaboration.
- **Workflow automation** coordinates and automates document-centric tasks between users and systems. Common uses are document review and approval life cycles, case-centric processes and electronic signatures. For more advanced needs, see the markets for business process automation (BPA), robotic process automation (RPA) and enterprise low-code application platforms (LCAPs).
- **Enterprise application integration** helps users access documents in context when using tools like Salesforce, ServiceNow, SAP ERP and SAP SuccessFactors, and Workday. Integration with applications like Epic Systems in healthcare and Duck Creek Technologies and Guidewire in insurance are also common.
- **Capture services** help users ingest and classify content from sources that include the user's device, end-user imaging services and other repositories. Document processing techniques for classifying content data include optical character recognition for text-based images, bar codes, text extraction and intelligent character recognition for handwritten text.
- **Artificial intelligence** solves significant knowledge management challenges focused on

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- **Deployment** model flexibility helps organizations commission and manage services in a wide variety of ways including through SaaS, vendor-managed services and client-managed services. Multitenant SaaS models are most common in collaboration use cases, and vendor-managed services are most common for operational use cases.
- **Administration and analytics** help power users and administrators configure the system, assess its performance and manage the system.

## Magic Quadrant

Figure 1: Magic Quadrant for Document Management



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**Gartner.**

## Vendor Strengths and Cautions

### Adobe

Adobe is a Niche Player in this Magic Quadrant. Its Adobe Document Cloud consists of

Acrobat Sign and Acrobat Services API. It's mainly focused on PDF content management

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Its roadmap is focused on integrating Adobe Acrobat with digital workplace suites as the PDF experience for Microsoft 365 and on generative AI (GenAI)-enabled document Q&A.

### *Strengths*

- **Business model:** Adobe's use of software as a service as a delivery method means that the business model scales well, supporting a large number of customers with relatively few employees. Adobe demonstrated strong growth in both customer acquisition and revenue, and it has a pricing model that is easy for clients to understand.
- **Product/service:** Adobe tools are commonly deployed for working with PDFs, including document review, annotation, authoring, editing, electronic signatures, redaction, accessibility, merging and prepress functions.
- **Industry standards:** Adobe created the original PDF standard and continues to be a major contributor to its stewardship. PDF is critical to many document-centric business processes and those seeking consistency with these specifications should consider Adobe solutions. However, support for these standards is widespread among document management tools.

### *Cautions*

- **Product/service:** Adobe's offering is not a document management tool but rather a PDF document viewing and editing tool that integrates with other document management tools of choice. As such, Adobe Document Cloud does not offer document management capabilities in many areas and relies on third-party tools to support information governance use cases.
- **Product strategy:** Adobe's roadmap did not indicate enhancements to address gaps in its document management capabilities compared with other vendors. Instead, it is focused on AI-enabling its document viewing and editing capabilities.
- **Vertical/industry strategy:** While Adobe has a broad customer base across many industries, it does not offer specific and tuned solutions for these clients. Adobe's

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Box is a Leader in this Magic Quadrant. Its Box Intelligent Content Management is mainly focused on digital workplace and external collaboration use cases.

Its operations are mostly focused across North America and Japan, with a relatively smaller presence in Europe. Much of its revenue is derived from enterprise accounts with more than 1,000 users.

Box demonstrates vision and strategy focused on operational business use cases through the recent acquisition of Crooze, a low-code application development platform for document management, and Alphamoon, an intelligent document processing platform. Additionally, it has announced Box Hubs, a system for managing curated content collections, and GenAI-enabled document Q&A as part of the offerings.

### *Strengths*

- **Operations:** With over 115,000 customers, Box's products operate at a velocity and scale that help acquire and onboard over 5,000 new customers every year. Box's scalable, multitenant SaaS architecture allows clients to extend its services to their entire workforce.
- **Business model:** Box's self-service models allow organizations to adopt its products with minimal friction. Its SaaS delivery model, including FedRAMP support for U.S. government agencies, means that the business model scales well, supporting a large number of customers with relatively few employees.
- **Market understanding:** Box continues to execute its vision of expanding its offerings from collaboration to operational use cases. Box demonstrates a strong understanding of the market and client needs, and recent acquisitions promise to deliver an alternative to traditional on-premises document management tools focused on operational use cases.

### *Cautions*

- **Data sovereignty:** Government clients outside of the United States, or those with geographic data residency regulation requirements, may not be able to align with Box's

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and other than platform certifications like FedRAMP, GxP and HIPAA, it does not currently offer strong content-centric applications tuned to the needs of specific industries.

- **Product strategy:** Box is losing market share to vendors focused on digital workplace suites, so it must adapt its product strategy to focus on new market opportunities. Organizations are increasingly consolidating investments into digital workplace suites (outside of Japan) to enable hybrid and remote workforces, rather than adopting best-of-breed digital workplace solutions like Box for document management.

## Dropbox

Dropbox is a Challenger in this Magic Quadrant. Its eponymous Dropbox product is focused on digital workplace and external collaboration use cases.

Its operations are mostly focused in North America, and it has clients in both the enterprise and consumer segments of the market, with the majority from the enterprise segment.

Dropbox's roadmap includes plans for digital workplace integrations with desktop co-authoring for Microsoft Office 365 (generally available in October 2024). AI improvements also include Dash (generally available in October 2024), which provides AI-powered universal search across connected apps to surface relevant content. Dropbox has further improved transcription experiences and intelligent filters for images and videos, as well as incorporating version management enhancements that include a side-by-side document comparison tool that highlights and summarizes all edits between versions.

### Strengths

- **Market visibility:** Dropbox has strong brand visibility in both the consumer and enterprise market segments. Dropbox continues to outperform peers in social media visibility.
- **Sales execution/pricing:** Dropbox executes at significant size and scale, with over 18 million paying customers. Its pricing is among the best in the market and is clearly attractive to customers who adopt the service in large numbers.

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- **Product:** Dropbox lacks depth of features for workflow, content governance, library services, metadata and AI that reduces its utility for use cases where these features are critical. It also has limited enterprise administrative controls, and there is a lack of coherence and consistency in its user experience.
- **Operational experiences:** Dropbox's support for enterprise application content services, content-centric business processes, and information governance use cases were weak due to lack of depth in enterprise application integrations, workflow automation, content governance, metadata and security capabilities.
- **Product strategy:** Dropbox's product roadmap lags behind some competitors in the market for GenAI- and AI-related technologies, with its Dash AI Dash feature becoming generally available in October 2024.

## Google

Google is a Challenger in this Magic Quadrant. Its products are Drive, Document AI and Vertex AI, which are focused on Digital Workplace use cases.

Its operations are global in nature, but mainly focused in North America and Europe.

Google's vision in this market is focused on digital workspace document management delivered as a suite and enabled by AI. Gemini for Workspace provides GenAI-enabled search and document Q&A. Google Document AI, an API service for document understanding and classification, offers both a training environment and pretrained models for common document types. Vertex AI supports a wide range of machine learning (ML) and GenAI use cases, including enterprise search.

*Google did not respond to requests for supplemental information or to review the draft contents of this document. Gartner's analysis is therefore based on other credible sources.*

## Strengths

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document analysis, capture and enrichment services. Those looking to leverage Google Cloud AI services should also evaluate its digital workplace tools for document management.

- **Product:** Google Drive provides effective, general-purpose Digital Workplace document management and supports External Collaboration use cases. For users of Google's digital workplace suite, Google Drive remains the best option for closely integrated document management.

### *Cautions*

- **Strategy:** Outside of its core Digital Workplace use case and collaboration utility, Google does not publish a detailed roadmap for developing the platform to support other document management use cases and industry-specific solutions.
- **Geographic strategy:** Google Workspace and Drive are only available in two regions — the U.S. and the EU — which makes it challenging to deploy them where local laws prevent data from being held outside national boundaries, such as France, Germany and Asia/Pacific (APAC).
- **Product:** Google's workflow automation, content governance, API and enterprise application integration, library, content storage and metadata services need further development to meet the needs of operational use cases. The Vault retention and e-discovery service lags in meeting operational business needs for advanced records management requirements, including record immutability, multiphase disposition and defensible destruction.

### **Hyland**

Hyland is a Challenger in this Magic Quadrant. Its products — Alfresco, Digital Business, OnBase, Nuxeo, Perceptive Content, Hyland Intelligent Document Processing (IDP), RPA, Automate, Insight and Credentials — are broadly focused on enterprise application content services, content-centric business processes and information governance.

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an evolution of the previous Hyland Experience strategy. Clients can leverage services like Hyland Automate alongside its current range of document management platforms, with additional content, process and application intelligence services planned for 4Q24 and 2025 as part of the roadmap. Its roadmap also includes AI enablement.

### *Strengths*

- **Industry strategy:** Hyland has a strong industry focus on healthcare, education and insurance in North America. Since each market operates as an independent business unit, clients can obtain domain-specific applications that are engineered to meet their specific industry needs.
- **Open-source:** Hyland is the only vendor represented in this research that provides open-source document management tools, which it offers with support subscriptions and vendor-managed services. Access to some of its platforms is available through open-source forums, allowing them to be assessed and tuned to client needs independently of the vendor.
- **Scalability:** Hyland has benchmarked Nuxeo with 10 billion documents in a single repository to provide best practices for building large-scale information management systems. Nuxeo's scaled-out architecture lends itself to a variety of horizontal and vertical scaling options, which helps clients that require high-volume content applications, like customer communications archives.

### *Cautions*

- **Product strategy:** It remains to be seen whether Hyland's recent strategic pivot to focus on federated content cloud — a fabric of in-place content services connected through cloud services — is aligned with market needs. Clients should carefully examine Hyland's unified product strategy as it relates to Perceptive Content, OnBase, Alfresco, Nuxeo and Content Innovation Cloud.
- **Business model:** Hyland reported a limited growth between calendar year (CY) 2022 and

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buying decisions. Hyland is slower to offer GenAI innovations than its competitors, and clients should determine whether the products they acquire confer rights to strategic products in its pipeline.

## IBM

IBM is a Niche Player in this Magic Quadrant. Its document management products are IBM Cloud Pak for Business Automation, watsonx Orchestrate and Watson Discovery. In addition, clients will recognize FileNet and Content Manager onDemand, which are focused primarily on content-centric business processes and information governance.

Its operations are global and its clients tend to be large enterprises with significant IBM technology investments.

IBM is focused on enabling the augmented workforce and operationalizing investments in AI. With its “Digital Labor” strategy, IBM believes that AI assistants will enable the augmented workforce and deliver effective business automation.

### *Strengths*

- **Offering strategy:** IBM provides strong workflow automation capabilities. Clients who are looking to automate document management business processes and who have existing investments in FileNet and Content Manager onDemand products should evaluate IBM’s product portfolio.
- **AI functionality:** IBM’s watsonx Orchestrate is a comprehensive and mature suite of AI capabilities that complements its business automation and document management portfolio. It provides GenAI-powered capture, classification and enterprise search features centered on content-centric business processes.
- **Market understanding:** IBM demonstrates a strong understanding of the document management market and the role of process automation in content-centric business processes. Its vision links together client investments in AI, document management and business processes.

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should be cautious about selecting IBM's portfolio of document management solutions for new projects, except where they can leverage existing investments in the technology.

- **Product:** IBM has inconsistent innovations and capabilities across its portfolio and some individual products pose challenges in integration. Clients should prudently negotiate pricing and SKUs with IBM to discern the specific features they require to make informed buying decisions.
- **Operations:** Regular upgrades in IBM's vendor- and client-hosted solutions are complex and slow to complete. It lags behind its competitors' offerings in meeting client demands for self-service SaaS solutions.

## Laserfiche

Laserfiche is a Leader in this Magic Quadrant. Its eponymous Laserfiche product is broadly focused on content-centric business processes and information governance.

Its operations are mostly focused across North America, with a partner-driven presence in Europe, Latin America and Asia/Pacific. Its clients tend to be small and medium-sized enterprises in the government, education, healthcare, financial services and manufacturing market segments.

Laserfiche is focused on scaling and automating its vendor-managed service to optimize its offerings' reliability and costs. This includes FedRAMP Moderate certification to align with the needs of government customers in North America. Its roadmap shows investments focused on leveraging AI, including document Q&A, knowledge-base Q&A and document classification.

### *Strengths*

- **Sales strategy:** With a strong indirect sales channel, Laserfiche helps customers engage with local implementation partners that mostly deliver multitenant, vendor-managed service options. Gartner Peer Insights data indicates that Laserfiche has the highest levels of customer satisfaction among the vendors surveyed.

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solution templates help customers solve common business problems without having to configure the platform for their specific business needs.

### *Cautions*

- **Overall viability:** Clients should be cautious of Laserfiche's ability to invest in its platform at the same rate as its largest competitors. With fewer employees, it has been slower to introduce AI capabilities into its product offerings.
- **Service:** Laserfiche does not provide self-service sign-up and provisioning of its service, which is a key trend in this market. Customers looking to run product trials need to work through its partners to secure access to the platform for trialing and provisioning services.
- **Geographic strategy:** Laserfiche has a limited direct presence outside of North America, and customers in other regions should seek assurance of its ability to support them in these regions in terms of cloud services and implementation.

### **M-Files**

M-Files is a Challenger in this Magic Quadrant. Its eponymous M-Files product is mainly focused on content-centric business processes and information governance use cases.

Its operations are focused in Northern Europe and North America, and its clients are mainly small and medium-sized enterprises, while 45% of its revenue comes from large enterprises. Its clients are mainly in the professional services, manufacturing and retail market segments.

M-Files plans to expand deployment of Aino — its GenAI assistant for search, knowledge-base Q&A and document Q&A — across its platform. It continues to roll out its enhanced user experience features and plans to launch improvements in key Microsoft 365 (M365) digital workspace experiences. Its roadmap includes improvements in trial experiences and cloud self-service capabilities.

### *Strengths*

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- **Market responsiveness:** M-Files demonstrates strong alignment with AI trends. It delivers the benefits that GenAI-enabled search and conversation have to offer in content by enabling an integrated experience through Aino and Microsoft content services.

#### *Cautions*

- **Deployment:** M-Files offers client- and vendor-managed services for the delivery of its solutions and try-before-you-buy services for prospects. However, it lags behind competitors for self-service purchasing and provisioning, i.e., SaaS
- **Marketing strategy:** M-Files' Knowledge Work Automation marketing is not aligned with clients' needs, which are instead focused on collaborative and operational use cases. M-Files industry solutions are nascent and not as widely deployed as those of other vendors.
- **Sales strategy:** M-Files' market reach through its partner channel underperforms in comparison to peers, and it fails to demonstrate expected returns from investments. Its geographic strategy and scaling outside of core markets mean clients outside of North America and Europe should perform due diligence on how the vendor will support them.

## **Microsoft**

Microsoft is a Leader in this Magic Quadrant. Its SharePoint Online, Microsoft Purview, Power Platform, and Microsoft 365 Backup and Microsoft 365 Archive products are focused on digital workplace use cases. We did not evaluate SharePoint Embedded as part of this research since it shares similar capabilities with SharePoint Online.

Its operations are geographically diversified, and its clients include small, medium and large enterprises in every market sector.

Microsoft deployed GenAI in its document management products and plans to continue the commercial rollout of its Microsoft 365 Copilot solution. It plans to further integrate AI using Microsoft Syntex and SharePoint Advanced Management. Microsoft Syntex and Purview will be enhanced to address information governance use cases. SharePoint Embedded will

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Businesses also apply these services broadly for operational use cases across the organization.

- **Automation capabilities:** Microsoft Power Automate's integration of business- and robotic-process automation enables users to automate common document-centric business processes and workflows. It balances the ability to create complex workflows with the ability for business users to build workflows with no-code tools.
- **Innovation:** Microsoft integrates GenAI in document management with Copilot. Its service is further complemented by SharePoint Premium, which incorporates transactionally priced content service components enabled by machine learning and AI services.

### *Cautions*

- **Operational use cases:** Microsoft products have well-documented service limitations, including a 30 million object per site library limit. They are commonly deployed alongside operationally focused document management tools for content-centric business processes and information governance.
- **Product packaging:** Microsoft's advanced features, such as those for records management, are only available with the more expensive Microsoft 365 E5 and Purview licensing. Clients should thoroughly evaluate Microsoft's portfolio to discern the specific functionalities they require.
- **Records management:** Microsoft's capabilities for complex record-keeping requirements lag due to its lack of multistage retention and pruning of the audit log (kept for 180 days) in its E3 subscriptions. This limits the application of Microsoft content services to some operational use cases that need to implement multiphase retention policies.

## **Newgen Software Technologies**

Newgen Software Technologies is a Niche Player in this Magic Quadrant. Its NewgenONE

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Newgen's roadmap is focused on applying the Marvin GenAI engine to a wide variety of content-centric tasks such as document classification, extraction, redaction, threat detection, document generation and business process design.

### *Strengths*

- **Offering strategy:** Newgen offers a broad range of capabilities across document capture, document management, document generation, low-code application development and business process automation use cases. Clients looking for a single vendor with a broad set of content services should evaluate Newgen.
- **Industry strategy:** Newgen is focused on building products for the banking, finance and insurance sectors, with solutions for predictive analytics in underwriting and risk management, real-time fraud detection and compliance reporting.
- **Workflow capabilities:** Newgen's workflow capabilities are part of an integrated suite that includes process design, interface design, data modeling, communication design and more. It provides prospective clients with integrated business processes along with low-code capabilities.

### *Cautions*

- **Service:** A significant proportion of Newgen's workforce is in the product support and professional services department, which is also its major revenue driver. Prospective clients should evaluate the need for significant vendor expertise and involvement to support and deliver their products.
- **Application integration:** Newgen's enterprise application content services and digital workplace use cases scored in the bottom half of vendors. Its capability to provide packaged integration with enterprise applications or digital workplace tools should be carefully assessed by prospective clients.
- **Geographical strategy:** Gartner continues to see little evidence of Newgen activity in the North American and European markets, as it rarely appears in vendor shortlists or is the

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Objective is a Niche Player in this Magic Quadrant. Its products are mainly focused on content-centric business processes and information governance in the government sector.

Its operations are mostly focused in Australia and New Zealand, and its clients tend to be large governmental organizations.

Objective's roadmap is focused on functionalities such as topic detection for search, AI-driven autoredaction, geo-specific records management classification templates, GenAI-powered document Q&A and document graphs, along with improvements that enhance user experience by leveraging GenAI.

### *Strengths*

- **Product:** Objective's Nexus and Federation capabilities are designed to meet the information management needs of security and defense-related organizations. Objective provides strong information governance features and is the only vendor to offer automated redaction capabilities.
- **Market responsiveness:** Objective demonstrates strong achievement against its product roadmap and goals and has a good release cadence to customers.
- **Industry strategy:** Objective is focused on the government market and most of its customers are in this segment. This strategy directs its product portfolio and investments in the market.

### *Cautions*

- **Geographic strategy:** Objective has limited ability to execute outside of its core markets, which are predominantly English-speaking. It lags behind its competitors' ability to support the localization needs of clients outside its home market.
- **Service:** Objective struggles to provide full self-service SaaS capabilities and is slow to onboard new customers at scale compared with its competitors, which impacts its growth.

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OpenText is a Leader in this Magic Quadrant. Its OpenText Content Cloud, which includes Extended ECM (recently renamed Content Management), Documentum Content Management and Core Content Management, is mainly focused on operational experiences, including use cases for enterprise application content services, content-centric business processes and information governance. It recently acquired Micro Focus, which included the Content Manager and IDOL (now renamed Knowledge Discovery) products.

Its operations are geographically diversified across North America, Europe and APAC, and its clients tend to be large enterprises.

OpenText's roadmap includes the evolution of tailored application experiences for government, engineering, life sciences and healthcare, as well as departmental solutions for HR (SuccessFactors integration), IT Ops and ITSM (ServiceNow and Service Management Automation X [SMAX] integrations) and Sales and Customer Service (Salesforce integrations). Insurance (Guidewire integration) is on the roadmap for early 2025.

### *Strengths*

- **Offering strategy:** OpenText's long-standing relationship with SAP is the centerpiece of its document management solutions, which are not only supported and resold by SAP as certified solutions but also subject to premium qualification for compatibility with its platform. Those looking for a premium SAP-endorsed document management solution should evaluate OpenText.
- **Marketing strategy:** The simplification of OpenText's offerings under the Content Cloud brand and 'X' licensing scheme has the potential to make its portfolio easier for buyers to understand.
- **Business model:** OpenText is a portfolio company with diverse interests in multiple markets, which enables it to leverage investments in AI and cloud across divisions, products and markets. Clients should evaluate OpenText Aviator AI capabilities to enhance their existing document management solutions.

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- **Licensing:** Entitlements to one of OpenText's document management products do not confer rights to others. Clients considering OpenText's new 'X-Plan' licenses should be cautious of changing licenses where existing license SKUs would suffice.
- **Deployment:** OpenText's range of deployment options includes client-managed services on private clouds, vendor-managed services on public cloud infrastructure and nascent SaaS solutions. OpenText's Core SaaS products are not as widely deployed as those of other established competitors with SaaS offerings due to a lack of self-service purchasing.

## Ricoh

Ricoh is a Niche Player in this Magic Quadrant. Its Ricoh Process Automation suite, which includes DocuWare, Axon Ivy, RICOH Kintone plus and PFU, is mainly focused on content-centric business processes and enterprise application content services use cases.

Its operations are mostly focused in Europe and North America, and its clients tend to be small and medium-sized enterprises.

Ricoh's roadmap includes incorporating ongoing improvements in user experience and mobility, integrating acquired intelligent document-processing solutions, and adding AI-powered document classification, data extraction and enhanced analytics. It also plans to launch inbound and outbound transfer of e-invoices in European markets, with Peppol and new web-based workflow configurations.

### Strengths

- **Geographic strategy:** Ricoh has considerable experience in the EMEA market. Its natively aligned departmental products are consistent with the requirements and objectives of small- to medium-sized organizations in the region.
- **Product:** Ricoh's DocuWare provides repeatable solutions for accounts payable invoice automation and contract life cycle management. It supports clients looking for discrete operational use cases that require enterprise application content services and content

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## Cautions

- **Enterprise focus:** Ricoh rarely deploys its document management tools as a broad platform for large enterprises. Large enterprise clients considering its adoption should thoroughly evaluate its utility as a platform to support the wide variety of enterprise use cases.
- **Product strategy:** Ricoh's acquisitions of DocuWare, Axon Ivy, PFU Limited and Natif.ai remain loosely integrated and overlapping, and clients will need to evaluate whether it is worth the effort to integrate them. The portfolio is a collection of separate products rather than an integrated suite.
- **AI capabilities:** Ricoh's DocuWare lags behind its competitors in delivering GenAI-powered features such as GenAI-enabled search and document summarization, and is making slow progress to fill these functionality gaps.

## SER Group

SER Group is a Leader in this Magic Quadrant. Its product, Dosis Intelligent Content Automation (ICA), is focused on operational experiences, including enterprise application content services, content-centric business processes and information governance.

Its operations are mostly focused in Europe, and its clients tend to be medium and large enterprises across a wide variety of sectors.

The Dosis ICA roadmap focuses on expanding its template library to include horizontal and vertical solutions, updating the user experience with a new cross-platform app, and improving natural language search. It also plans to support Google Cloud Platform, improved scaling for enterprise apps, new digital workplace integrations and new AI services, including AI Cockpit v2 with fine-tuning for large language models (LLMs).

## Strengths

- **Product:** SER Group demonstrates strong execution around AI and user experience in its current products, including a comprehensive range of AI capabilities. Clients looking for

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with SAP ERP, SAP SuccessFactors, ServiceNow and Salesforce should consider SER Group.

- **Vision and strategy:** SER Group's vision is centered around ICA, which augments content-centric processes to deliver business value through the use of AI.

### *Cautions*

- **Marketing strategy:** SER Group is less well-known than many competitors in this research. Its visibility outside its home markets is limited, according to search volume and web traffic analysis.
- **Deployment:** SER Group provides a vendor-provisioned, multitenant-managed service, but it needs self-service solutions to scale, grow and compete with SaaS competitors. Clients should evaluate the degree to which vendor involvement is required when onboarding and provisioning services.
- **Global operations:** Clients seeking a vendor operating outside of SER Group's core markets should be cautious about the vendor's ability to support their local needs.

## **ShareFile**

ShareFile is a Visionary in this Magic Quadrant. Its eponymous ShareFile product is broadly focused on external collaboration and content-centric business processes.

Its operations are mostly focused in North America, and its clients tend to be small- and medium-sized enterprises.

ShareFile's roadmap includes improvements and simplification in its client portal, new client views for documents, workflows, tasks, new solutions for legal client intake and cross-industry billing, integration of AI into the platform, personalized experiences, and ongoing strengthening of security and compliance postures.

*Note: During the course of this research, it was announced that Progress Software had*

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- **Operations:** ShareFile is a SaaS vendor that onboards and provisions services to customers at scale. Clients looking for an easy-to-adopt and deploy technology should evaluate ShareFile.
- **Product:** ShareFile's connectors allow it to act as a front end to existing file systems, which aids in a transition to cloud services. Clients with significant existing file share investments wishing to continue with this strategy should evaluate ShareFile.

### *Cautions*

- **Market visibility:** ShareFile struggles to capture the attention of enterprise buyers for document management tools because it is focused on small and medium-sized enterprises. Clients with large enterprise requirements should be cautious while evaluating ShareFile.
- **Enterprise application integrations:** ShareFile lags behind its competitors' focus on API and enterprise application integrations, even though it provides integration with Salesforce applications. Clients looking for document management integration with the usual range of enterprise applications should thoroughly evaluate whether ShareFile meets their needs.
- **Marketing strategy:** ShareFile struggles to consistently articulate how its product offerings and bundles help solve real client problems. This may pose a challenge for prospective clients to align product capabilities with their document management requirements.

## Inclusion and Exclusion Criteria

To qualify for inclusion, vendors must demonstrate that they met the following criteria:

- **Market definition:** Meet the Gartner definition of document management.

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- Vendors must have acquired 50 new enterprise customers for the nominated document management product/service.
- The vendor must have 2023 revenue of over \$100 million.
- **Customer interest:** Rank among the top 25 for the Customer Interest Indicator (CII) as defined by Gartner. CII is calculated using a weighted mix of internal and external inputs that reflect Gartner client interest, vendor customer engagement and vendor customer sentiment from 1 May 2022 to 6 May 2024.
- **Product or service capability:** Providers must offer the following functionality in their document management solution:
  - **Mandatory:** Content storage, metadata, search, library and repository services, security and protection, digital workplace integration and information governance.
  - **Common:** Mobility, API and integration services, collaboration, workflow automation, enterprise application integration, capture, artificial intelligence, deployment and administration and analytics.
- **Customers:** Have at least 500 enterprise customers for the document management product/service, with at least 100 customers deploying over 500 licenses.
- **User licenses:** Have at least 200,000 seats of the document management product actively used by clients.
- **Geography:** Have an active presence in at least three regions. “Active presence” is defined as having at least 10% of the document management revenue billable in a single region outside of the primary territory and a further 5% of revenue billable in a third territory. A region is defined as:
  - North America
  - Europe

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- **Product language:** The product(s) must offer at least three language choices.

## Honorable Mentions

**AODocs:** AODocs is a document management vendor with operations primarily in North America and Europe. Its product is available as multitenant or single-tenant vendor-managed services primarily hosted and integrated with Google Cloud Platform infrastructure. Its clients typically include enterprises within key verticals, including manufacturing, engineering/construction, and healthcare. AODocs did not qualify for this research because it failed to meet the qualifying criteria for business performance.

**AISHU:** AISHU is a document management vendor with operations primarily focused on the Chinese market. Its product has a collaborative heritage and provides solutions that embed artificial intelligence and include low-code development capabilities. AISHU did not qualify for this research because it failed to meet the qualifying criteria for business performance.

**d.velop:** d.velop is a document management vendor with operations primarily focused in Germany. Its eponymous d.velop platform is an operationally focused document management tool that offers solutions for departmental use cases like contract management and invoice processing, as well as electronic signatures. It also offers a range of enterprise application content services for SAP, Salesforce and Microsoft Dynamics. d.velop chose not to participate in this research.

**Egnyte:** Egnyte is a document management vendor with operations primarily focused in North America and Europe. Its Egnyte platform is designed for collaborative use cases in architecture, engineering, construction (AEC), financial services and life sciences. Egnyte chose not to participate in this research.

**Papyrus Software:** Papyrus is a document management vendor with operations primarily focused in Europe and North America. Its Papyrus Enterprise Content Manager and WebArchive Platform is focused on customer and operational experiences. Papyrus did not meet the qualifying criteria for business performance.

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**Product:** This includes generally available product capabilities and is measured by critical capabilities scores, assessment of digital workplace application integrations, assessment of enterprise application integrations and vendor delivery and execution of the roadmap.

**Overall Viability:** It measures annual revenue, growth and profitability, market-specific revenue growth, productivity and R&D investment.

**Sales Execution/Pricing:** It measures pricing and contract flexibility, pricing model for fully hosted solutions, revenue growth in enterprise segments, user pricing and new customer acquisition.

**Market Responsiveness and Track Record:** This criterion considers the provider's history of responsiveness to changing market demands. Its measures include product release cadence, product roadmap execution and time to market.

**Marketing Execution:** This "mind share" can be driven by a combination of publicity, promotional activity, thought leadership, social media, referrals and sales activities. It is measured by external search metrics, external social media relevance, Gartner inquiry presence, market visibility, vendor website traffic and other sources.

**Customer Experience:** It measures the customer experience in terms of product and solution quality, selection and implementation, vendor interaction and overall satisfaction.

**Operations:** It measures overall operational health, ability to deliver, employee engagement and effective resource management.

#### Ability to Execute Evaluation Criteria

<i>Evaluation Criteria</i>	<i>Weighting</i>
Product or Service	High
Overall Viability	High

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Evaluation Criteria	Weighting
Marketing Execution	Medium
Customer Experience	High
Operations	Low

Source: Gartner (December 2024)

## Completeness of Vision

**Market Understanding:** It measures vision and strategic focus, as well as the vendors’ ability to listen to and act upon customer feedback.

**Marketing Strategy:** It measures go-to-market approach, marketing investment, messaging narrative clarity and consistency, and product service bundling.

**Sales Strategy:** It measures channel strategy, effectiveness of customer acquisition strategy and partner network size.

**Product Strategy:** It measures the breadth and depth of the product portfolio, product roadmap quality and deployment models.

**Business Model:** It measures our assessment of the business model, including its efficiency, market alignment with overall business, success of new delivery models and outcomes from the business model.

**Vertical Industry Strategy:** It measures the clarity and consistency of vertical focus and the vendor’s vertical/industry portfolio.

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## Completeness of Vision Evaluation Criteria

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

Source: Gartner (December 2024)

## Quadrant Descriptions

### Leaders

Leaders in this market have a well-defined strategy for addressing the need for document management and its five key use cases. They are well-aligned with industry trends for either

At the time of writing, the market is dominated by a few large players, with a few smaller players emerging.

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## Challengers

Challengers in this market have the operational capability to service document management needs and functional capabilities broadly aligned with those of Leaders. However, there may be gaps that are evident in the Critical Capabilities. Innovation in artificial intelligence, SaaS or experience may progress more slowly than that of Leaders and their vision may not align with mainstream market needs.

## Visionaries

Visionaries in this market demonstrate a strong understanding and strategic approach to delivering their solutions to customers. Their vision includes an appreciation for how document management must be tailored to the needs of individuals, teams and enterprises. They typically offer SaaS delivery models.

## Niche Players

Niche Players in this market focus on either their current customer base or on relatively niche use cases. They tend to lack a broader understanding of market trends and do not adapt or respond to these trends as swiftly as others. Gartner tracks a large number of document management vendors, and most of these can be described as niche. A Niche Player may offer superior capabilities for a given use case than a more general vendor categorized as a Leader.

## Context

Document management tools are general-purpose platforms that can be configured to address different collaborative and operational use cases. The name for this market reflects the vernacular commonly used by buyers and end users when referring to these types of solutions.

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Operational uses focus on how employees leverage content in their professional roles in finance, legal, human resources, sales, marketing, services and research and development. In these contexts, content is more closely controlled due to operational needs or legal compliance. These use cases include enterprise application content services, content-centric business processes and information governance. Gartner previously covered operational uses in the markets for enterprise content management (ECM) from 2004 to 2016 and content services platforms (CSP) from 2017 to 2023.

Vendors increasingly offer products that cover digital workplace, external collaboration, enterprise application content services, content-centric business processes and information governance use cases. Evaluating vendors side-by-side across these use cases is crucial for clients who need to select tools based on these user experiences. Vendors with strengths in one document management use case do not necessarily exhibit strengths in another. The current best practice is to deploy separate tools for digital workplace, external collaboration and operational experiences.

The number of content services — including applications, platforms, and components — in organizations is growing, and document management tools are only one choice for buyers. Gartner tracks over 30 markets (see [Market Finder: Document Management](#)) for tools with document management capabilities. Buyers should exercise caution when using general-purpose tools for complex and domain-specific tasks.

This Magic Quadrant provides a snapshot of the current document management market, and year-over-year comparisons should be avoided. It is designed to assist you in selecting document management tools, but it should not be used as your sole resource. Use the companion Critical Capabilities for Document Management to help identify how products compare against functional categories and how well they align with use cases.

Your final selection criteria must reflect your organization's functional and technical requirements as well as its business objectives. Do not, for example, select a Leader or reject a Niche Player solely based on such categorization. Assess any vendor that meets your

"must have" requirements — a vendor in any of the four quadrants could be the best choice.

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We evaluate vendors' ability to support the following five common use cases, which fall into the broad categories of collaborative and operational-centric uses.

Collaborative experiences enable digital workplace and external collaboration use cases, allowing employees to share and collaborate on documents with colleagues or third parties while keeping content synchronized across devices.

Operational experiences enable use cases for enterprise application content services, content-centric business processes, and information governance, supporting business unit operational needs, such as within finance, legal, HR, sales, marketing and R&D, along with additional requirements for information security and compliance controls.

The document management market is a mature market with many vendors having been active for over 20 years. Change is often gradual rather than revolutionary, but key trends impacting this market over the past 18 to 24 months include:

**AI:** Microsoft rolled out Copilot for its M365 suite, and vendors have increased their focus on a broad range of AI innovations. AI and GenAI are critical to improving automation in content-centric processes, freeing humans from repetitive tasks and improving our ability to make sense of content.

Client demand is increasing as the range of AI-enabled services vendors are seeking to offer has grown to include:

- GenAI-enabled search
- Natural language query
- Document Q&A
- Knowledge base Q&A
- Document classification
- Metadata extraction

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- Transcription

**Deployment:** Clients want simpler procurement, deployment, operations and access to innovation and as a result, two deployment models account for the majority of new purchases. Self-service SaaS is common for collaborative use cases like Digital Workplace and External Collaboration. Vendor-managed services are common for operational use cases; however, there is a growing trend toward SaaS for operational experiences as well. SaaS solutions have been expanding more rapidly than non-SaaS options but often struggle to offer the same depth of features as vendor-managed services. Long-standing vendors have been slow to provide a viable, fully featured SaaS/PaaS solution, which remains critical as SaaS vendors like Box and ShareFile venture into operational use cases and experiences.

**Experience:** The number of content experiences is expanding, becoming increasingly nuanced and tuned to operational business needs. Some document management vendors offer prepackaged applications or templates that solve common departmental or industry needs. These solutions may compete with more specific content service applications in markets like accounts payable invoice automation, contract life cycle management, legal document management and digital asset management. Choosing a document management tool has never been more challenging as platforms and applications increasingly vie for attention.

**Acquisitions:** OpenText has been at the forefront of acquisitions, and in 2023, it acquired Micro Focus, which has a wide portfolio of content services, including Content Manager (formerly HP Content Manager or TRIM) and the Autonomy products for enterprise search. Box acquired Crooze for content-centric business processes and Alphamoon for intelligent document processing. Ricoh added to their Docuware acquisition with AxonIvy, RICOH Kintone plus and PFU.

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## ⊕ Evidence

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