IDC MarketScape

IDC MarketScape: Worldwide Cloud Content Services 2022 Vendor Assessment

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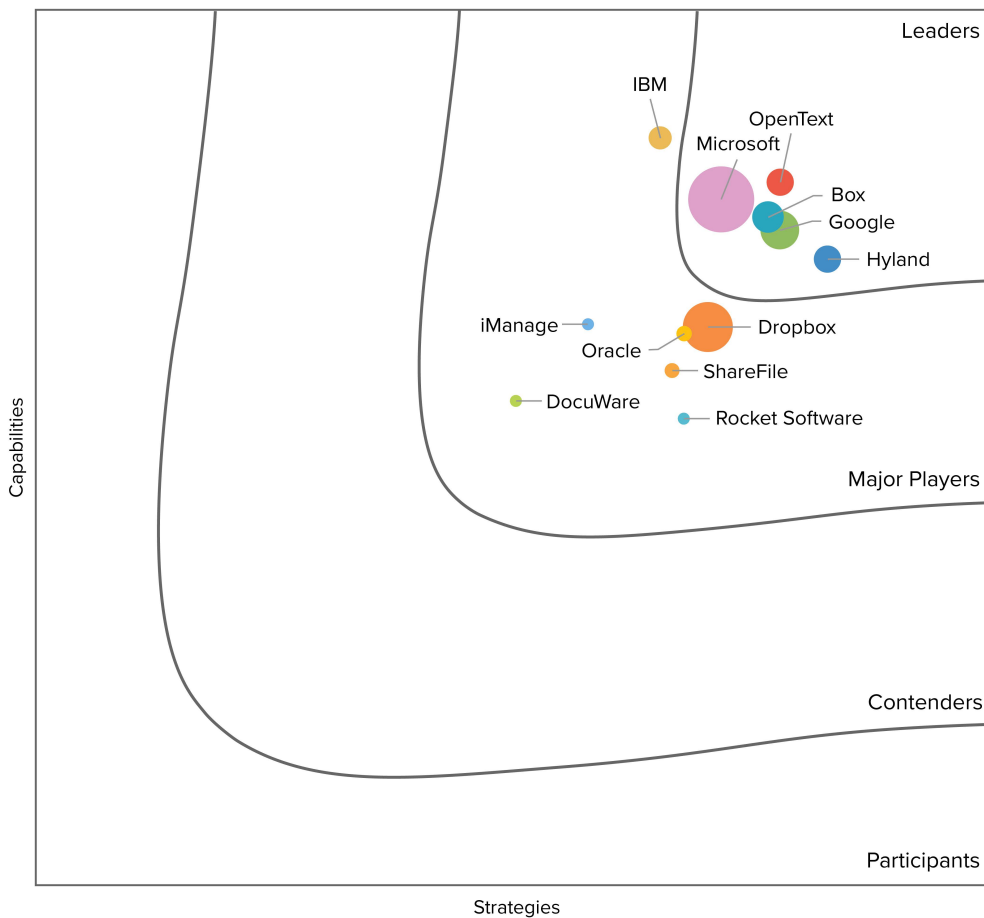
THIS IDC MARKETSCAPE FEATURES OPENTEXT

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Cloud Content Services Vendor Assessment

IDC MarketScape Worldwide Cloud Content Services, 2022

Source: IDC, 2022
Please see the Appendix for detailed methodology, market definition, and scoring criteria.

IN THIS EXCERPT

The content for this excerpt was taken directly *IDC MarketScape: Worldwide Cloud Content Services 2022 Vendor Assessment* by Steve Charbonnier and Holly Muscolino (Doc #US48315822). All or parts of the following sections are included in this excerpt: IDC Opinion, IDC MarketScape Vendor Inclusion Criteria, Advice for Technology Buyers, Vendor Summary Profile, Appendix and Learn More. Also included is **Figure 1**, page one.

IDC OPINION

Providing employees with secure remote access to content is one of the primary challenges that organizations face in supporting their remote and hybrid users. As such, investment in content services solutions has been a critical component to improving teaming, communication, and collaboration for organizations operating in this environment. However, there are several priorities driving investment in these technologies beyond simply allowing employees remote access to content. Organizations are investing in content services technologies with a focus on modernizing their technology, improving efficiencies of business operations, centralizing content technologies, and shifting them to the cloud.

Recent IDC data shows that in North America, only 14.4% of content services workloads are hosted in on-premises datacenters. Over 40% of these workloads are hosted in cloud-based platforms, including software as a service (SaaS)/multitenant cloud-based applications or public cloud deployments, with the remaining hosted in enterprise private cloud, dedicated hosted private cloud, or hybrid cloud environments (source: IDC's *U.S. IT Quick Poll — Content Services Survey,* January 2022). IDC has seen increasing buyer interest in cloud applications and the agility, scalability, and innovation that the cloud enables. Many traditional enterprise content management (ECM) and content sharing and collaboration (CSC) vendors have transitioned to cloud apps to meet this growing demand.

Investment in cloud-based content services technologies does come with a number of significant benefits and considerations for organizations, in detail:

- **Interoperability:** Connectable cloud content services and microapps allow organizations to take a plug-and-play approach to create dynamically reconfigurable systems for business-specific use cases. Processes are accelerated with orchestrated discrete microservices, prepackaged industry-specific solutions, and/or connected to new data sources to eliminate the inefficiencies of disconnected processes.

  How individual organizations approach this can vary depending on the business's specific requirements. One-third of organizations have deployed unified content platforms that offer all (or most) of the required capabilities, allowing them to deploy out-of-the-box solutions with prebuilt modules or connectors. However, most organizations prefer modular applications or cloud services that can be integrated via connectors or application programming interfaces (APIs)

- **Security and compliance:** Improving content security and compliance are included in the business objectives for many organizations investing in content services technology. These objectives are especially crucial for organizations operating in heavily regulated industries or within specific regional data requirements. As a result, we have seen growing customer demand for cloud vendors that can process workloads in specific geographic regions to comply with these requirements or can offer private and hybrid cloud options to address them where needed. Customers are also looking for granular security tools to manage permissions, access, monitoring, and a growing number of devices. Fourty-eight percent of

organizations say that improved security was one of the most significant benefits of shifting to the cloud.

- **Advanced technologies:** Sixty five percent of organizations plan to or are already utilizing artificial intelligence (AI) and advanced analytics widely to enhance their digitized content processes. AI automation, machine learning (ML), and "digital coworkers" help improve operational efficiencies and assist with manual and error-prone tasks. These technologies can also be used to provide real-time, data-driven insights to optimize business workflows. Top use cases for these technologies include providing more intelligent search capabilities, analyzing data usage and process efficiency, and supporting decisioning in automated content-intensive workflows. IDC has also seen growing customer demand and vendor response for low-code/ no-code applications. These applications allow business and nontechnical users to create automated workflows and processes without relying on IT.

- **Future of work:** With a growing focus on user experience, cloud-based content services play a critical role in connecting users to the people, processes, and content they need. In fact, 30.6% of organizations that have transitioned to cloud-based content services have observed that this shift has enhanced employee experience. By integrating disparate systems/processes and applying automation technologies, content can automatically surfaced within the flow of the user's work when it's relevant to the task at hand. Content technologies also look to work in tandem with communication, authoring tools and automation tools to improve efficiencies and collaboration internally, and external partners and customers.

- **Federation and governance:** With new customer initiatives to improve content discoverability, vendors are introducing content federation capabilities, aided by content analytics, that minimize the requirement to understand exactly what content exists and where it physically resides. Connecting enterprise applications and disparate repositories allows organizations to apply data-driven automation, enabling connected knowledge, interactive communication, decisioning, and automated document generation across corporate boundaries. Adopting enterprisewide governance policies and automated tools can allow for scheduled review, archive, and disposal of all content without manual intervention. Processes can be automatically recorded and audited, ensuring that organizations meet all the policies and regulations related to its content-centric processes.

- **Industry and line-of-business (LOB) expertise:** Templated workflows, processes, and prepackaged solutions that are created based on years of expertise make it easier to deploy workspaces and processes with a tailored user experience, default metadata, and automated workflows and governance actions. Partners can contribute their expertise to the platform via packaged apps or extensions to support an even broader range of industry or functional use cases. Advanced analytics tools and configurable dashboards can surface information that is critical to end users specific to their roles or industry needs.

- **Administration:** Cloud-hosted content services remove many administrative maintenance and management tasks that would otherwise fall on organizations' internal IT departments. Robust tools and dashboards monitoring deployed applications, storage, access, processes, and services require fewer human resources to effectively manage these systems, allowing organizations to shift focus to value creation and innovation.

The traditional enterprise content management applications and content sharing and collaboration applications markets have continued to converge into the cloud as more agile and scalable cloud content services with a common set of capabilities. With hybrid work becoming a globally accepted business practice, the need to scale access to content from anywhere to improve the overall

effectiveness and efficiency of business operations has become critical for many organizations. Modern cloud technologies, including microservices, will transform manual, document-based tasks to intelligent digital workstreams, allowing organizations to compete effectively in a digital-first world.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

The vendor inclusion list for this study was selected to accurately depict the vendors that are most representative of any cloud-based content management platform buyer's selection list. Vendors were then surveyed and further investigated to ensure that cloud content management offerings qualified as "SaaS or cloud enabled" and the vendor had won recent cloud content management deals.

A critical point in this research effort is to meet the following inclusion criteria:

- Reported a minimum of $20 million in cloud-deployed content services annual recurring revenue generated by subscriptions.
- Has had customers using cloud content services in production for at least 12 months as of April 1, 2022.
- The solution is delivered in either a public cloud, private cloud, or hybrid cloud.
- The solution provides core content life cycle, collaboration, workflow, records management, and delivery capabilities.
- The solution leverages 3rd Platform technologies (e.g., cloud, mobile, artificial intelligence, advanced analytics, and machine learning) in the following areas: user interface (UI), analytics, administration, security, authentication, and interoperability.

ADVICE FOR TECHNOLOGY BUYERS

IDC has seen steady buyer demand in deploying content management, sharing, and collaboration applications. Content is a critical component for any business — and secure, agile access to all services around the content life cycle is crucial for this hybrid workforce. That workforce needs secure access to content anytime, anywhere, and on any device. And they need to be able to author, collaborate, edit, repurpose, review, route, approve, and publish content. Vendors have responded by extending their offerings with new cloud solutions, content migration tools and services, and flexible purchasing options.

From a data security and privacy protection perspective, government regulations and corporate policies continue to evolve requiring more robust digital content and auditing controls. Data security requirements are further heightened by the permanent shift to remote work in some organizations. Multiregional and hybrid clouds will continue as a critical delivery method for customers where regulations and security are of utmost importance. Many organizations have noted that the biggest benefits to shifting to the cloud have been improved security, increased efficiencies, and easier maintenance (n = 100, source: IDC's *U.S. IT Quick Poll — Content Services Survey,* January 2022), allowing them to lessen the burden on internal IT staff.

Investment in content services technologies should be considered within the context of larger organizational digital transformation (DX) strategies. DX strategies should be continuously evaluated and updated as the organization gains experience. Tech buyers should also be open to feedback from end users to identify areas of improvement and future investment. Organizations are already setting

goals to completely digitize and transform their document processes, and those that have yet to start risk falling behind.

With a focus on agile cloud content services, technology buyers should pay specific mind to the following areas:

- **Faster business value and lower TCO via cloud offers:** In the past, most business teams had to deal with lengthy technology deployments that involved significant capital investment and extended the lead time from planning to execution of business services. Expectations have changed in a SaaS and cloud world where solutions can be deployed in days or hours. Cloud content services vendors have begun to take advantage of the latest advancements in cloud-native infrastructure, containers, and microservices offering buyers the agility, portability, and scalability they need in digital-first environments. Buyers should consider how vendors package and price its content services offering, as well as what support is provided for initial setup and/or customization to get them up and running quickly.

  Tracking success is critical to understanding ROI, what value the solution provides, and can be evaluated for future investment opportunities. Buyers should look for content services technologies that provide capabilities to monitor progress via native or third-party reporting and analytics. Key metrics including direct business revenue, cost efficiencies, productivity improvements, and opportunity costs should be measured to determine the overall value.

- **Interconnected systems:** Growth in cloud apps encourages a plug-and-play approach to content management. Vendors understand that it is no longer viable to offer a standalone solution and that they must allow connections to cloud content services for added functionality via open APIs, microservices, and partner or developer extensions. Buyers must consider vendors' abilities to allow their content services to be consumed by common business applications, as well as their ability to plug-in to multiple repositories, content life-cycle applications, collaboration tools, and intelligent digital workspaces. Vendors that offer a marketplace with certified integrations and third-party–developed extensions will allow customers to test, validate, and purchase additional functionality quickly.

- **Future of work:** Collaboration tools and cloud-based productivity suites have become critical to supporting hybrid work. With hybrid work formally incorporated into many organizations' policies, processes, and technologies, buyers must evaluate content services' abilities to work in tandem with communication and authoring tools the organization uses. They should prioritize functionality that makes it easy to initiate a data request, kick off a project into a collaborative workspace, and automatically surface content relevant to the task at hand. Modern cloud content services can provide new connections and data insights that eliminate the inefficiencies of information silos and disconnected processes. Nearly half of all business users are already automating aspects of their own work, with another 41.3% expected to do so in 2022 (source: IDC's *Future of Work Global Survey,* April 2022). Buyers should consider vendors that provide easy-to-use low-code/no-code tools and education, allowing their business users to automate workflows with minimal IT intervention.

- **AI and ML:** Many buyers are looking for automation, optimization, and data-driven insights as part of their digital transformation initiatives. A recent IDC survey found that over 65% of organizations are using or plan to use advanced analytics and AI widely across the organization to transform their content-centric workflows (n = 100, source: IDC's *U.S. IT Quick Poll — Content Services Survey,* January 2022). Customers should look for opportunities to further leverage AI and advanced analytics to automate document identification and classification and labeling/tagging and trigger workflows of multi-structured content. Vendors that leverage AI and ML to provide more intelligent search, decision handling, and protection of personally

identifiable information and automate repetitive tasks should be heavily considered within the buyer's evaluation processes.

- **Prioritization of the user experience:** Employee adoption of new technology is often a barrier to success. To support the hybrid workforce, buyers will need to focus on the administrative and end-user experiences of the product to ensure that adoption is successful across the organization. Training and continuous education should be available from a vendor in the form of guided tutorials, hands-on training, and/or in-app feature help. Buyers should also consider vendors that have developed or partnered with industry-specific solutions and service offerings tailored to their specific business needs.

- **Data trust and governance:** With the increase in data protection regulations at a regional and corporate level, buyers must consider cloud application providers with improved data security and compliance according to governance standards. As more work traverses the globe, it is important that these vendors provide a dynamic and agile content framework that can support geo-portable workloads in the cloud including the management of user access, permissions, localizations, and activities at the metadata level. Buyers that are particularly risk averse or in heavily regulated industries should evaluate the certifications at the data, application, and infrastructure layers that individual vendors provide.

VENDOR SUMMARY PROFILE

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of strengths and challenges.

OpenText

OpenText is positioned in the Leaders category of the 2022 IDC MarketScape for cloud content services.

OpenText is a public company founded in 1991 and headquartered in Waterloo, Ontario.

Quick facts about OpenText are as follows:

- **Employees:** 14,800
- **Number of cloud customers:** 3,000+ private cloud customers and 11 million public cloud subscribers
- **Products evaluated:** OpenText Content Cloud, inclusive of OpenText Extended ECM and OpenText Core
- **Market coverage:** North America, Latin America, Europe, and Asia/Pacific markets with 17 languages supported in the UI
- **Industry focus:** Government, financial services, manufacturing, utilities, and healthcare
- **Top customer use cases:** Single repository for storing and controlling business documents; automating content associated with ERP, CRM, HCM (i.e., order to cash, procure to pay, hire to retire); and records management for compliance, workflow orchestration and digitization, and collaboration with external parties
- **Ideal customer size:** Upper midmarket and enterprise
- **Cloud architecture:** Cloud enabled and SaaS; cloud products vary in multitenancy and containerized architecture availability

- **Cloud deployment:** Public and virtual private cloud, single and multitenant on OpenText Cloud Platform, AWS, Azure, Google, RedHat, and OpenShift
- **Uptime service-level agreement (SLA):** 99.9%
- **Pricing models:** On premises/perpetual, access (number of users or transactions), and subscription (based on tiers/groups of service)
- **Key differentiators:** It offers integration with enterprise applications such as SAP, a breadth of use cases, information governance capabilities, line of business and industry focus, and flexible deployment options.
- **Interesting fact:** OpenText is a proven provider of cloud content services that hosts over 22 million end users in its own cloud. In addition, OpenText offers customers a broad array of capabilities that go beyond traditional document management. Capabilities begin with capture to case management and document generation. By connecting these various capabilities and integrating with applications like SAP, Salesforce, Office 365, and Teams, without the need to purchase additional connectors or services from third-party providers, large global enterprises are seeing the opportunity to modernize their processes and are engaging with OpenText to help shift another critical business functions to the cloud.

Strengths

- **Cloud infrastructure:** OpenText supports deployment on its own cloud as well as most hyper-scalers and Kubernetes platforms including Google, Azure, AWS, RedHat OpenShift, and Cloud Foundry. OpenText offers deployment workflows that pre-integrate all resources for the cloud managed services over different hyperscalers to speed up time to value. Turnkey content services deployments can support a number of business scenarios including procurement, sales, and contract management.
- **Workflow and content federation:** OpenText can interact with workflows and documents coming from other leading cloud collaboration environments such as SAP S/4HANA, Teams, and Salesforce. Users can trigger a workflow from a widget embedded in other cloud collaboration environments. Workflows can also be used to route documents dynamically into specific workspaces configured based on other business applications. OpenText also provides robust tools for content federation across various file shares, email, physical media, document storage, and collaboration with a number of regional and industry-specific compliance certifications.
- **Integrations:** OpenText provides prebuilt integrations to all commonly used horizontal business applications. In addition, OpenText offers packaged applications to address vertical use cases for public sector, EPC, financial services, energy, and life sciences, as well as horizontal use cases including case management, plant maintenance, global trade services, EHS, location services, 2D and 3D CAD format support, portfolio and project management, contract management, SOP management, grants management, IT service desk, employee file management, and privacy management.

Challenges

- **Regional language support:** OpenText currently supports 17 languages, which is relatively low compared with other vendors evaluated in this IDC MarketScape. Supporting documentation is also limited and is only available in English, French, German, Japanese, Spanish, Russian, and Dutch. OpenText's partner network provides additional language support.
- **Advanced reporting and analytics:** While OpenText supports a number of reporting and analytics capabilities, it has limited advanced options leveraging AI or ML for insights for user actions for both business users and administrators.

- **Pricing and packaging:** OpenText has a very wide array of content services technologies in its cloud content portfolio. In certain cases, this can lead to confusion for customers when it comes to understanding pricing and selecting the appropriate integrations. At the company's annual user conference in October 2022, OpenText announced new tiered price plans to simplify this process for new and existing customers.

Consider OpenText When

Organizations in highly regulated industries should consider OpenText for its strong content governance, records management, and workflow capabilities. Content services integrations across the OpenText portfolio and tight integrations to SAP, Teams, Salesforce, and a long list of horizontal solutions makes OpenText suitable for a wide array of use cases and will be especially pertinent to large enterprise customers.

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

This IDC study represents a vendor assessment of SaaS and cloud-enabled enterprise content application software vendors as of 2022 through the IDC MarketScape methodology at a worldwide level. This assessment presents both quantitative and qualitative characteristics of cloud content management applications in the market, as it relates to the planning, budgeting, and forecasting tasks that are typically conducted in support of managing and processing content in a global setting. The evaluation is based on a comprehensive and rigorous framework that assesses each vendor

relative to the criteria and to one another. It was a requirement that the content application not only runs in a cloud setting but also takes advantage of the cloud constructs such as multiregional data and process orchestration, scale and elasticity of users and data, distributed agility with edge computing, and self-service purchasing and provisioning of modules.

Market Definition

- **Cloud native.** The software is designed and built to take full advantage of the cloud architecture often associated with microservices for large distributed networks like cloud. Apps are containerized and actively orchestrated for increased agility and ease of maintenance of the application. Apps are paid for as you go via a subscription model.

- **Cloud enabled.** A traditional on-premises application is deployed into a cloud environment as a delivery model. The application has not been rearchitected for the cloud.

- **Content-centric workflow.** The workflow is dependent on tasks that generate, consume, or otherwise act on content. Content-centric workflows can be manual, technology enabled, or transformed. Content-centric workflows can invoke other content-centric workflows and can occur sequentially or in parallel.

- **Content sharing and collaboration.** Content sharing and collaboration applications (referred to as file synchronization and sharing applications) enable users to store, synchronize, and share file-based content and folders across designated devices, people, and applications.

- **Document.** Document is defined as any container for business information. It can be paper or digital, and it can be structured like a form or unstructured like a report. In addition to any type of paper format, documents include email, text messages, instant messages, and web posts. Documents can be text or images — an x-ray or another medical image is a document. A web page may also be considered a document.

- **Enterprise content management.** Enterprise content management software enables organizations to capture, build, organize, manage, and store enterprise documents and records. ECM provides a foundation for knowledge management and compliance and — combined with business process management and analytics — a platform for delivering applications that automate document-centric business processes.

- **Capture.** Core functionality of capture includes the cleanup and preprocessing of scanned images, conversion of images to machine-readable text (optical character recognition [OCR], intelligent character recognition [ICR], etc.), document classification, categorization and indexing, and intelligent extraction.

- **Document and records management.** Document management functionality includes version and access control, metadata creation and management, and search. Records management functionality includes records declaration, creation and maintenance of file plans and retention schedules, automated enforcement of retention schedules, and support for regulatory compliance. Solutions typically include workflow engines (e.g., for document routing and task management) and may include case management frameworks.

- **Hybrid cloud.** A cloud computing environment uses a mix of private cloud and public cloud services with orchestration between the platforms, allowing data and applications/solutions to be shared between them.

- **Infrastructure as a service (IaaS).** Preconfigured hardware is provided via a virtualized interface for compute (systems), storage, and/or network capacity of a cloud that includes systems infrastructure software (e.g., servers, system management, and security services such as Amazon EC2).

- **Multicloud.** A deployment environment uses two or more public or managed cloud computing services in a single heterogeneous architecture for complete or partial application/solution delivery.
- **PaaS (platform services).** Integrated services for application development and life-cycle management; application deployment; code testing, quality, and application life-cycle; and data management are provided as a service in the cloud (e.g., middleware such as Microsoft Azure Platform).
- **Private cloud.** Private clouds are delivered on dedicated hardware (compute, storage, and network) that is not shared across multiple distinct customers. Shared infrastructure (IaaS, PaaS, and SaaS) is virtualized hardware that is used concurrently by multiple customers as well as bare metal hardware, which can be quickly (<1 hour) reallocated to another customer. Dedicated hardware can be also virtualized or bare metal, but in either case, the entire system (physical compute and storage plus virtual private network) is used only by a single customer and cannot be reallocated to another customer in less than 1 hour:
  - **Enterprise private cloud** architectures are deployed and managed by the organization's in-house datacenter and IT staff.
  - **Dedicated-hosted private cloud** architectures are hosted/managed by the vendor, dedicated to the use of the organization.
  - **Virtual private cloud** (on-demand hosted private cloud) is shared public cloud service with virtualized resources allocated to single tenant needs.
- **Public cloud.** Utilizing shared infrastructure is virtualized hardware that is used concurrently by multiple customers as well as bare metal hardware, which can be quickly (<1 hour) reallocated to another customer.
- **Software as a service (SaaS).** Software is built for multitenancy and delivered and consumed as a service through a one-to-many model. The software is centrally managed and updated across all users, accessed by users remotely via the web, and offers self-service functionality. Apps are paid for as you go via subscription pricing.

LEARN MORE

Related Research

- *IDC Market Analysis Perspective: Worldwide Enterprise Content Strategies, 2022* (#US49200222, September 2022)
- *IDC MaturityScape: Content-Centric Workflow 2.0* (#US47774322, August 2022)
- *IDC Worldwide Enterprise Content Management Applications and Content Sharing and Collaboration Applications Software Forecast, 2022–2026* (#US47774422, June 2022)
- *IDC Worldwide Enterprise Content Management Applications and Content Sharing and Collaboration Applications Market Shares, 2021: Modernizing Content Services with Cloud, AI, and Advanced Analytics* (#US48710622, May 2022)
- *IDC Content Services Core to the Future of Work* (#US48985022, April 2022)
- *IDC Future of Work Trends for 2022* (#US48712522, January 2022)
- *IDC FutureScape: Worldwide Data and Content Technologies 2022 Predictions* (#US48082521, October 2021)

Synopsis

This IDC study provides an assessment of the principal SaaS and cloud-enabled enterprise content applications and presents the criteria most important for companies to consider when selecting a system. This assessment discusses both quantitative and qualitative characteristics that explain success in the ecosystem. The evaluation is based on a comprehensive and rigorous framework that assesses vendors relative to the criteria and one another and highlights the factors expected to be the most influential for success in the market during both the short term and the long term.

"Organizations have recognized the benefits of modern cloud-based content services architectures, including increased efficiency, improved security, and ease of deployment," according to Steve Charbonnier, research manager, IDC's Enterprise Content Strategies research program. "As we move forward, content agility will be critical to support new work models. Organizations will continue to modernize their content services technologies, replacing legacy applications with individual cloud services/modules that provide greater flexibility and leverage AI and advanced analytics to truly transform their content processes."

About IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications and consumer technology markets. IDC helps IT professionals, business executives, and the investment community make fact-based decisions on technology purchases and business strategy. More than 1,100 IDC analysts provide global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries worldwide. For 50 years, IDC has provided strategic insights to help our clients achieve their key business objectives. IDC is a subsidiary of IDG, the world's leading technology media, research, and events company.

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