

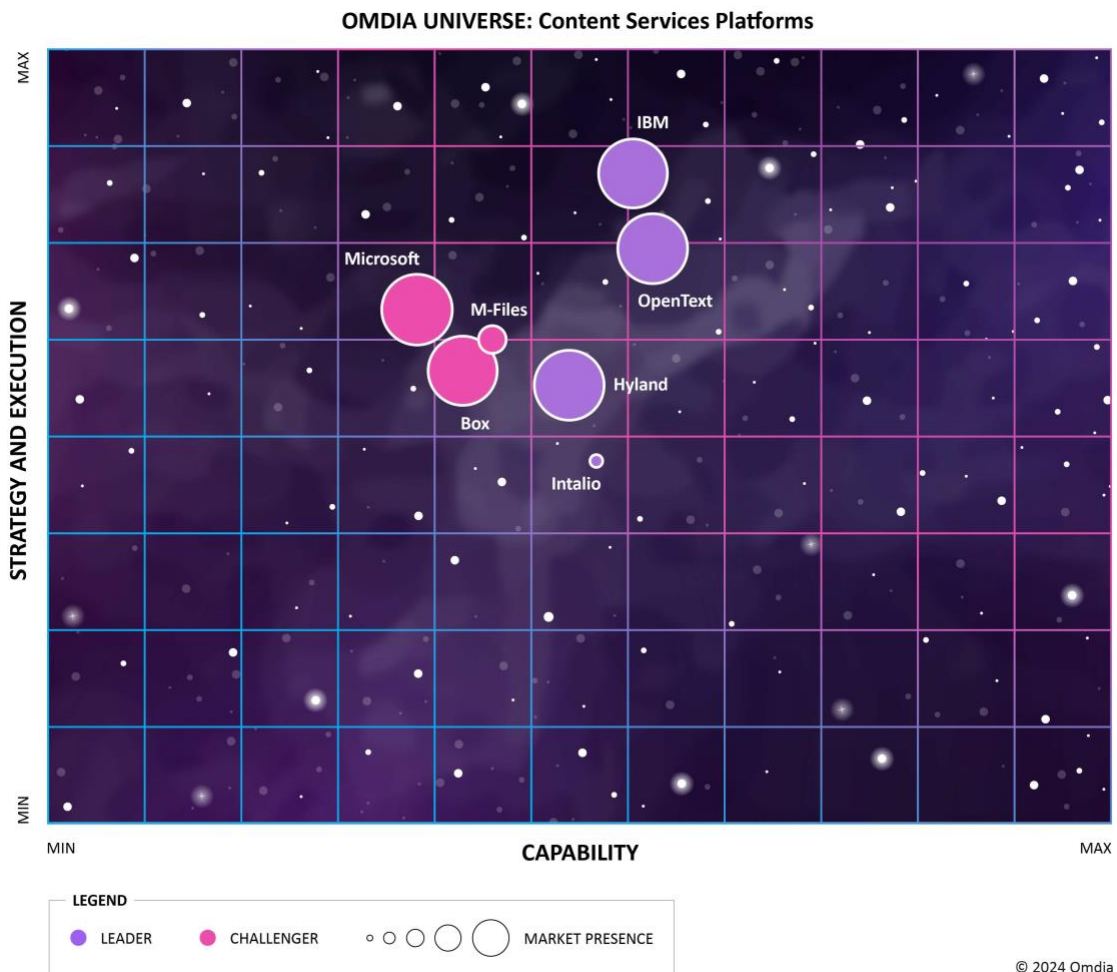
Omdia Universe: Content Services Platforms, 2024– 25

Summary

Catalyst

As employees become increasingly mobile and dispersed, securely managing and protecting corporate content while providing employees with the tools they require to locate the documents and templates they work with is becoming more of a challenge. This Omdia Universe for content services platforms in 2024–25 compares leading content services platforms, allowing enterprises to make informed choices when selecting a platform to address their requirements.

Figure 1: The Omdia Universe for Content Services Platforms 2024–25



Source: Omdia

Omdia view

The new normal for enterprises is to have a much more dispersed workforce than before the COVID-19 pandemic, and while many employees have returned to the office, some are still working entirely from home or are splitting their time between office and home. This has resulted in enterprises being forced to change working practices to ensure employees have the tools required to perform their roles efficiently. One of the ways to achieve this is by accelerating digital transformation initiatives by replacing legacy applications with modern, agile applications and by adapting their systems and infrastructure to support a hybrid workforce.

Many enterprises are still in the process of digitally transforming; this is ongoing, with fewer than a quarter of enterprises well advanced with digital transformation in the area of exploiting business information, according to Omdia's *IT Enterprise Insights – 2025* (ITEI) survey. Although Omdia data shows that IT budgets are increasing year-on-year, there will still be an emphasis on rationalization and optimization by making efficiencies and cost savings, which will largely be achieved in the content management space through technology.

Content services platforms play a significant role in providing employees with content management and collaboration capabilities. Artificial intelligence (AI) and automation have become much more important as they can enable mundane manual tasks to be automated, allowing employees to be much more productive and processes to be completed more efficiently, with customers receiving much quicker responses to queries or applications. Some vendors include business process management (BPM) tools that enable enterprises to build automated processes, and this should be a consideration when selecting a content services platform. Where these manual processes are mundane and highly repetitive, robotic process automation (RPA) may be an option, and some content services platform vendors have added RPA to their portfolios.

Generative AI (GenAI) also has an important role to play, as leading content services platform vendors are adding capabilities to their portfolios, and we expect to see this continue over the coming years. Initial capabilities include text summarizations and text generation to help employees author content. Many more capabilities will be added in the coming years, and while some will become standard and widely available, some vendors will remain ahead of the curve. Therefore, GenAI features will be a differentiator between vendors.

Another area where automation coupled with AI is playing an important role is intelligent capture, which can capture and process digital and paper documents. The latter is valuable for supporting a disparate workforce, where the ability to automatically route documents through a process with minimal or no human interaction increases employee productivity and customer satisfaction.

Cloud is now the dominant deployment option for content services platforms, with nearly 29% of enterprises deploying content management in a SaaS environment now or within the next 18 months, according to Omdia's 2025 ITEI survey. A further 17% either have or are planning a PaaS deployment, and only 9% are still deploying on-premises, although 17% are using a hybrid environment, combining on-premises with a public cloud. While large vendors that serve very large enterprises may still provide on-premises options, newer, less established vendors are more likely to only offer cloud deployment, although private clouds may be an option. On-premises options are diminishing, and although some large enterprises in highly regulated industries may be a long way from adopting a cloud model, many enterprises are migrating to the cloud, and vendors should offer tools and professional services to help with migration initiatives.

Analyzing the content services platform Universe

Market definition

Content services platforms manage content within enterprises, integrating various components, applications, and services to handle different types of content. Much lighter than legacy enterprise content management (ECM) systems, many of the ECM capabilities are accessible as SaaS-based content services. Core features that should be available with a content services platform are:

Core capabilities

- **Content services platform:** Includes the content repository, document management and collaboration, workflow, integration, and search capabilities. Some platforms provide additional capabilities, such as records management and analytics.
- **Document management and collaboration:** The ability to create and edit content in a collaborative environment; collaboration capabilities may include file sync and share.
- **Workflow and BPM:** The ability to create content-centric processes that are often triggered by the receipt of an item of content. These may range from simple approval processes to complex processes involving multiple application interactions.
- **Content services and integration:** Features included to enable content services include development tools, common integration mechanisms, including APIs and pre-built connectors, pre-built horizontal and vertical industry applications and components, and content services applications themselves, such as records management and capture.
- **Cloud capabilities:** The various options for cloud deployment, including the cloud options available; which public clouds are supported; the ease, cost, and speed of migrating content to the cloud; and cloud security.
- **Security, compliance, and governance:** Features and functions included that help ensure that content is secure and managed appropriately to ensure compliance. Features include records management and information rights management.

Advanced capabilities

- **Content analytics:** Tools that analyze how content is being used and who is using it, which is useful in assessing whether content has value to the organization.
- **Generative and intelligent AI:** AI capabilities are increasingly embedded throughout the platform in areas such as document management, content analytics, BPM, reporting, and search. The addition of GenAI extends the capabilities to include text summaries, content generation, and AI assistants.

Market dynamics

Enterprises need to provide modern, secure technologies and environments to manage content to ensure compliance with regulations and protect against the growing threat of data breaches and cyberattacks. The task is made harder by the fact that employees are more dispersed, with many working from home for at least part of the time. Therefore, enterprises have to consider security features offered when selecting a content services platform. In some cases, this means deploying in the cloud to take advantage of the security provided by the cloud vendor, but in other cases, enterprises want to deploy on-premises to ensure their data remains behind their firewall. Although many of the smaller vendors have adopted cloud-only deployment models, bigger vendors serving large enterprises are more likely to offer on-premises deployments to support existing customers who are reluctant to adopt the cloud. However, some vendors provide migration tools that help enterprises move their content and applications from on-premises environments to the cloud.

The content services platform market is evolving, and there have been changes in the market since the last Content Services Platforms Omdia Universe in 2023. OpenText acquired Micro Focus, one of the leading vendors from the last report, with the acquisition closing at the end of January 2023, just after the report was published. This has had an impact on the market as Micro Focus specialized in compliance and governance, was targeted at highly regulated industries, and offered a slightly different proposition. OpenText has integrated technologies from the acquisition into its Aviator GenAI portfolio, including Vertica and IDOL, which has been renamed OpenText Discovery.

Many of the larger vendors have increased their presence in the content services platform market by acquiring smaller vendors. For example, Hyland acquired Alfresco and Nuxeo, while OpenText acquired EMC Enterprise Content Division in 2017 before it acquired Micro Focus. This reduction in the number of high-profile vendors has enabled smaller, more specialized vendors to increase their market presence. These include M-Files and Intalio, both of which are included in this Omdia Universe for the first time.

In terms of technology, the content services market is being driven by GenAI, and this means that as many capabilities become generic, vendors will increasingly be judged on their AI, particularly GenAI capabilities. While the first steps for most vendors are text summarizations and authoring content, some vendors are moving more quickly by adding features such as AI assistants and task automation tasks. GenAI will become a real differentiator and be embedded into many automated processes to enable employees to become more productive. While IBM has built its own large language models (LLMs), the other vendors in the report use LLMs already in the market, although the use of retrieval augmented generation (RAG) enables enterprises to update an LLM with corporate data to ensure that responses are accurate.

The list that follows shows vendor rankings in the Content Services Platforms Universe.

Vendor	Products evaluated
Leaders	
Hyland	Alfresco, Nuxeo, OnBase, Perceptive Content
IBM	<p>IBM Cloud Pak for Business Automation 23.0.0, IBM Cloud Pak for Business Automation as a Service (SaaS). IBM Cloud Pak for Business Automation includes the following components: IBM FileNet Content Manager, IBM Datacap, IBM Automation Document Processing, IBM Business Automation Workflow, IBM Business Automation Insights, IBM Process Mining, IBM Robotic Process Automation, IBM Operational Decision Manager</p> <p>Add-ons: IBM Watson Discovery - SaaS and Cloud Pak for Data 5.0, IBM App Connect - SaaS and Cloud Pak for Integration 16.1.0, IBM watsonx Orchestrate - SaaS and Cloud Pak for Data 5.0, IBM watsonx.ai - SaaS and Cloud Pak for Data 5.0</p>
Intalio	<p>Intalio Case 1.8, Intalio Correspondence 2.3, Intalio Viewer 4.5, Intalio DAM 8.5, Intalio Insight 36.2, Intalio Sign 5.5, Intalio Dashboard, Intalio IAM 20.4, Intalio Meeting 16.1, Intalio Executive17.1, Intalio Digital Mailroom 18.1, Intalio Site Inspection 19.1, Intalio Engineering 21.1, Intalio Tender 22.1, Intalio Strategy 23.1, Intalio Contracts 24.1, Intalio Enterprise Search 25.1, Intalio Outlook 26.5, Intalio Desktop 27.5, Intalio OCR 28.3, Intalio Face 29.1, Intalio Speech 30.1, Intalio Chatbot 31.1, Intalio Document Classification 32.1, Intalio ANPR 33.1, Intalio Object Detection 34.1, Intalio Sentiment 35.1, Intalio Storage 38.3</p>
OpenText	<p>OpenText Documentum Content Management X-Plans, OpenText Documentum Content Management, OpenText Documentum Content Management for SAP, OpenText Documentum Archive for SAP, OpenText Documentum Content Management for Microsoft 365, OpenText Documentum Content Management for Salesforce, OpenText InfoArchive, OpenText Documentum Content Management clients, OpenText Core Capture, OpenText Core Share, OpenText Core Signature, OpenText Documentum Trusted Content Services, OpenText Documentum Advanced Workflow, OpenText Documentum Certified Records, OpenText Documentum Physical Records, OpenText Intelligent Viewer, OpenText Brava Enterprise Blazon, OpenText Documentum Content Connect, OpenText Documentum Content Transformation Service</p> <p>Add-ons: OpenText Content Aviator, OpenText Aviator Search, OpenText Developer Aviator, OpenText Knowledge Discovery, OpenText Documentum External Read/Write Transactions, OpenText Data Protector, OpenText Magellan Risk Guard, OpenText Vendor Invoice Management, OpenText Documentum APxCelerator, OpenText xCP, OpenText App Works, OpenText Intelligent Capture, OpenText Documentum for Life Sciences (23.4), OpenText Documentum for Healthcare (23.4), OpenText Documentum for Engineering (23.4)</p>
Challengers	
Box	Box Platform, Box Drive, Box Relay, Box Shield, Box Governance, Box KeySafe, Box AI, Box Canvas, Box Notes, Box Hubs, Box Sign
M-Files	M-Files Platform, M-Files Ment, M-Files Hubshare, Version 24.8 (August 2024)
Microsoft	SharePoint, Microsoft 365

Source: Omdia

Market leaders

Hyland, IBM, Intalio, and OpenText are the market leaders in this report. To be a leader, a vendor must have a large number of capabilities across all technology areas and score highly across the majority of areas. Most will have strong AI and machine learning (ML) capabilities and will either already have implemented GenAI capabilities or be considering how to exploit the technology. They will generally have strong areas where they have differentiated themselves from their competitors. Leaders tend to be larger and have a higher market profile than challengers and prospects, although there are exceptions; Intalio is one such example in this report. However, because they have more capabilities, their products may be more complex to implement, requiring more extensive professional services and longer and more complex implementation projects.

Market challengers

The market challengers are Box, M-Files, and Microsoft. Challengers score highly across most technology areas, but they may be missing a few features that leaders have or may have less extensive functionality across certain areas. Challengers' platforms are typically not as extensive as those of the leaders: they are less complex to implement, requiring fewer professional services, and enterprises with the appropriate in-house skills may be able to complete the implementation without any external support. Challengers have the potential to become leaders by adding a few more capabilities and finding areas in which they can innovate.

Market prospects

There are no prospects in this report because prospects are niche players that may operate in a particular area of the market. The capabilities of a prospect may still be extensive, but because they are targeting a specialized area of the market, not all of these features will be included in a report of this nature, which compares the capabilities of products that target a much wider market. Deployment options do not necessarily define a prospect, and they can be extensive, providing a great deal of choice. Prospects can become challengers if they widen their appeal to a broader market by adding some of the missing capabilities—but this is not always the aim of a specialist, niche vendor, which may have a monopoly in its small section of the market.

Opportunities

Opportunities for content services platform vendors include GenAI, which enables vendors to be innovative in the use cases they develop for the technology. Early use cases including text summarizations, content creation, and AI assistants are becoming commonplace, and vendors can be innovative by introducing use cases that include automation, such as initiating a workflow.

Digital transformation provides an opportunity for vendors as there are still many enterprises that have yet to update legacy applications. Vendors should consider adding more out-of-the-box capabilities, such as pre-built applications for common tasks, enabling enterprises to get up and running quicker and reduce the requirement for professional services.

Another opportunity comes from RPA, with vendors that already have the technology in their portfolios at an advantage. Building solutions to automate mundane, repetitive tasks such as document capture will help enterprises struggling to reduce costs to do more with less. Vendors that do not already have RPA in their portfolios should consider adding it, as many content-centric tasks that are still being performed manually are ripe for automation.

Threats

A threat to vendors comes from enterprises using legacy ECM applications for content management and those using systems built in-house. It is often difficult for these enterprises to replace systems because of the amount of dependent code, which makes replacing any of them a major undertaking that is often prohibitively expensive. Vendors need to ensure they have migration tools that make it easier to migrate existing content and offer professional services, low and no-code tools, and integration capabilities to make the migration task feasible.

Another threat comes from the number of content services platform vendors competing in a tough market. There are different vendor types, with the first type comprising smaller specialist companies that just offer content services platforms and related products; these mostly originated as electronic document management and records (EDRM) vendors. Multiple product vendors also largely originated in the EDRM space but then evolved into ECM due to the large number of content management applications they provided. Hyland, IBM, and OpenText are in this group. Box started as an EFSS vendor. Microsoft SharePoint and Microsoft 365 are the products that all other content services platforms integrate with and compete against when Microsoft customers grow their content services platform requirements.

Market outlook

Although mature, the content management space, of which content services platforms are an important part, is still growing at a forecast annual growth rate of 12.37% between 2021 and 2026, according to Omdia's *Software Market Forecasts: Analytics and Data Management, 2021–26*. We expect the value of the market to increase from \$34.815 billion in 2024 to \$44.112 billion in 2026. These forecast figures suggest many enterprises have yet to upgrade legacy ECM systems to a content services platform.

Omdia's 2025 ITEI survey shows that 25% of enterprises plan strategic investments in content services platforms, with a further 33% planning minor investments. This is broadly in line with intended investments in other areas of the content management ecosystem, including AI-driven workflow, automation, and augmentation, which suggests that enterprises are looking for more automation capabilities throughout their content management portfolios, including content services platforms. At the same time, almost 19% of enterprises have either not started or are in the early stages of digital transformation in the area of modernizing legacy applications, indicating that there may be enterprises with legacy content services platforms that would be well-advised to examine the feasibility of migrating to a modern content services platform. This would provide employees with a modern and intuitive solution with built-in automation and AI capabilities to help them work more effectively and be more productive, satisfying the quarter of enterprises that put improving employee experience and engagement as their top two strategic priorities relating to the future of work.

Vendor analysis

OpenText (Omdia recommendation: Leader)

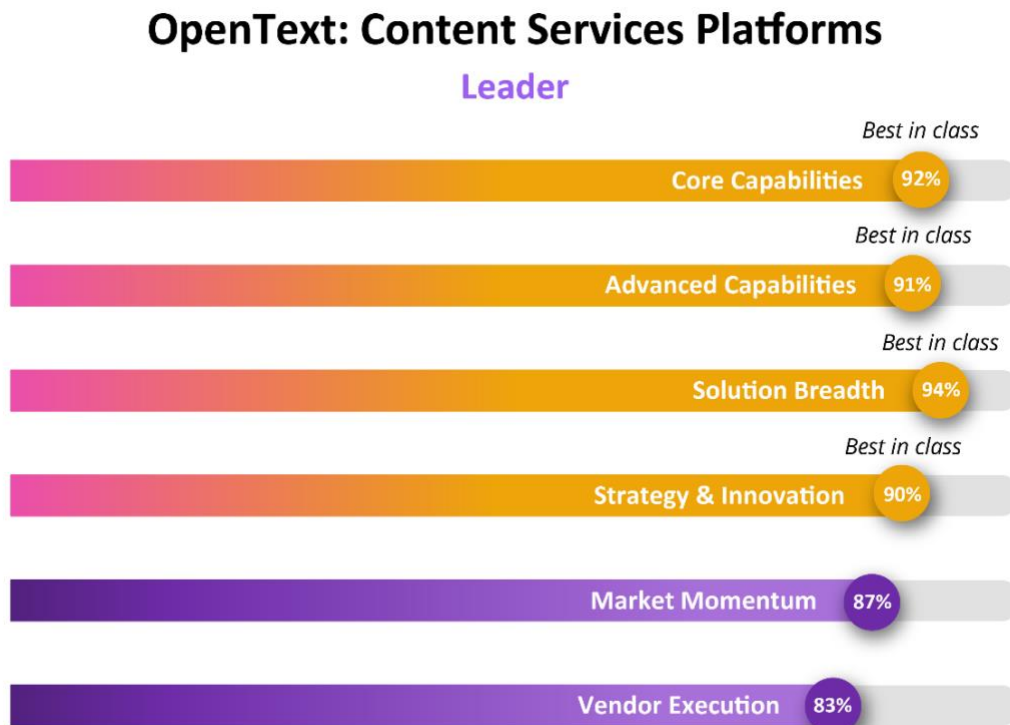
OpenText should appear on your shortlist if you are an enterprise in a highly regulated industry or are looking for a content management solution with tight integration with SAP, Salesforce, or Microsoft.

Overview

OpenText has grown rapidly over the past few years due to several high-profile acquisitions. In January 2023, it acquired Micro Focus, providing OpenText with a large portfolio, including IDOL, now named OpenText Discovery. OpenText is a well-established content services platform vendor with three platforms: OpenText Content Management, OpenText Documentum Content Management, and OpenText Core Content Management. Documentum is the focus of this report. OpenText Documentum manages high-volume content for organizations, many of which are in highly regulated industries. It provides applications for energy and engineering, life sciences, and healthcare and has partners that provide solutions for other industries. It has tight integrations and partnerships with SAP, Salesforce, and Microsoft.

OpenText has introduced GenAI to its portfolio with its Aviator solutions, with Content Aviator and Aviator Search particularly relevant to Documentum. OpenText offers various deployment models, including on-premises, cloud, and hybrid options. Documentum can be deployed to bare-metal, virtualized, and containerized infrastructure. In addition to traditional on-premises deployment, Documentum can be deployed in a dedicated private cloud environment; cloud deployment options include SaaS, PaaS, and IaaS. Hybrid deployments combining on-premises and cloud are also available, and OpenText also offers managed services where it manages the Documentum deployment on behalf of the enterprise, whether it is on-premises, in the cloud, or in a hybrid environment.

Figure 2: Omdia Universe ratings—OpenText



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Source: Omdia

Strengths

OpenText is strong across all capability areas, but its strongest categories include content services platforms; content analytics; and security, compliance, and governance.

The core OpenText Documentum Content Management platform includes the Documentum Content Server to store and manage content, metadata, and versions, as well as services for search indexing, content security, lifecycle management, and workflows. Documentum Smart View is a configurable, responsive web-based interface for managing documents. Documentum Advanced Workflow provides tools and engines for designing, executing, and managing manual and automated business processes. Documentum Administrator provides system administrators with a web-based tool to manage and configure the Documentum environment, including security settings, repository maintenance, and system configuration, with health dashboards for system reporting and data insights, such as user activity, document usage, and external transaction activity. Intelligent Viewing provides a viewer for secure content viewing, annotation, and redaction. OpenText InfoArchive is an archiving solution to preserve and access historical data and content. Documentum is tightly integrated with Microsoft 365, SAP, and Salesforce, allowing users to access and manage content directly from these applications.

The Core range of products are SaaS solutions that extend Documentum’s capabilities. Core Capture uses continuous machine learning to automate intelligent file classification and data extraction, Core Share provides EFSS capabilities, and Core Signature is an e-signature capability that can be added to any

workflow. Documentum supports simple and advanced searches with a variety of techniques and methods. Boolean operators, faceted searches, interactive filters, semantic search, relevance scoring, snippet generation, and term detection are all supported. Federated search across multiple Documentum repositories and other connected content sources simultaneously is also enabled.

Out-of-the-box content analytics in Documentum include automatic classification and tagging and advanced and faced search capabilities. Content can be analyzed to ensure that compliance requirements are met. Sentiment analysis is supported, and customer interactions and feedback are analyzed. GenAI has been added to the capabilities and can provide summarizations of long documents. Content usage analytics are also available, including analyzing how content is accessed and used to understand user behavior and preferences and identifying the most frequently accessed or popular content to prioritize updates and improvements. Advanced OpenText content analytics for ML, GenAI, and business insights are available as add-ons to Documentum. These products include OpenText Intelligent Capture, Content Aviator, Knowledge Discovery (IDOL), Aviator Search, Magellan, Risk Guard, and Voltage. Techniques including text mining and NLP, tokenization, named entity recognition, topic modeling, text classification, and part-of-speech tagging can be applied in content analytics. ML techniques supported are supervised learning, unsupervised learning, and deep learning that utilize neural networks. Dashboards and reports are available for data visualization to highlight trends, patterns, and insights, and interactive visualizations allow a deeper content exploration. Knowledge graphs allow information to be represented as a network of entities and their interrelationships to provide context and enhance search capabilities. Image and video analytics are supported, and spoken language can be converted into text for analysis. Voice emotion analysis is also supported.

Content security is ensured through a multi-layered approach that includes user authentication, access controls, encryption, auditing, and compliance features. OpenText Documentum Content Management's records management is part of the platform and includes Documentum Retention Management or Retention Policy Services (RPS); Documentum Records Manager (RM); Documentum Certified Records (CR); and Documentum Physical Records Services (PRS). Documents can be manually declared as a record by completing a form that has metadata associated with it. Documents can also be declared as records by linking them to a policy-managed folder or by applying a policy directly to the document.

PRS allows the management of physical records by applying retention policies and litigation holds to manage the controlled aging process. RPS provides retentions, holds, and dispositions. RM adds DoD 5015.2, security restrictions, containment rules, naming systems, and manual declaration of multiple items into DoD records. OpenText Documentum includes a mobile app that provides secure mobile access to the Documentum repository from iOS and Android devices. Multiple documents can be uploaded at a time. Files downloaded to a device for viewing or offline usage are kept in the app's private storage, which is not accessible by other applications. Documentum offers a variety of administrative reporting tools and capabilities to help manage, monitor, and optimize content and processes. Key reporting features include system audit logs, performance reports, usage reports, predefined reports, custom reports, user activity reports, content lifecycle reports, workflow reports, resource usage, and cloud metric monitoring.

Limitations

OpenText is strong across all capability areas, but it does not score as highly on vertical industry solutions as some vendors. OpenText focuses on a few key verticals where it offers industry solutions. These verticals are generally in highly regulated industries where OpenText can provide value through its built-in security features. While OpenText has streamlined licensing and pricing according to capabilities, the advanced nature of Documentum means careful planning is essential for successful deployment and support at a reasonable price point. Self-managed on-premises installations allow some flexibility, as do custom plans for

Documentum in the cloud. However, because standardized cloud packages are fixed to meet common use cases, customers may find a fit with a bundle that includes additional functionality more useful for future use cases.

Appendix

Methodology

Omdia Universe

Omdia's rigorous methodology for the Universe product involves the following steps:

- Omdia analysts perform an in-depth review of the market using Omdia's market forecasting data and Omdia's enterprise insights survey data.
- Omdia creates a matrix of capabilities, attributes, and features that it considers to be important now and in the next 12–18 months for the market.
- Vendors are interviewed and provide in-depth briefings on the current solutions and future plans.
- Analysts supplement these briefings with other information obtained from industry events and user conferences.
- The Universe is peer reviewed by other Omdia analysts before being proofread by a team of dedicated editors.

Inclusion criteria

The criteria for inclusion of a vendor solution in the *Omdia Universe: Selecting a Content Services Platform, 2024–25* are as follows:

- The solution must be capable of operating as a standalone solution.
- The solution provides integration capabilities to a wide range of applications.
- The vendor has adopted a cloud-first architecture that allows the solution to move easily between on-premises and the cloud.
- The solution has a significant level of recognition among enterprises, covers a range of verticals, and has a presence in multiple geographies.

Further reading

[Trends to Watch 2024: Content Management](#) (November 2023)

[*IT Enterprise Insights: IT Drivers and Technology Priorities – 2025*](#) (October 2024)

[*IT Enterprise Insights: IT Spending & Sourcing – 2025*](#) (October 2024)

[*Generative AI: Market Landscape 2023*](#) (March 2023)

[*Fundamentals of Content Services Platforms – 2023*](#) (March 2023)

[*Market Landscape: From Experimentation to Real-Life Use Cases for Generative AI*](#) (July 2024)

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