

Magic Quadrant for Enterprise Content Management

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ECM delivers solid business benefits to IT leaders as the market shows continued growth. The 23 vendors in this Magic Quadrant are addressing increased demands for better mobile and cloud capabilities, as well as more rigorous expectations for vertically specific needs.

Market Definition/Description

Enterprise content management (ECM) can be viewed from two perspectives:

- **As a strategic approach**, ECM can help enterprises take control of their content and, in so doing, boost effectiveness, encourage collaboration and make information easier to share.
- **As a software toolset**, ECM consists of a set of capabilities and/or applications for content life cycle management that interoperate, but that can also be sold and used separately.

The core components of an ECM suite are:

- **Document management.** Core capabilities include check-in/check-out, version control, security and library services for business documents. Advanced capabilities include compound document support and content replication.
- **Image-processing applications.** These applications enable users to capture, transform and manage images of paper documents. We require a vendor to offer: (1) document capture (scanning hardware and software, optical and intelligent character recognition technologies, and form-processing technology) using native capabilities or a formal partnership with a third-party solution provider, such as KnowledgeLake, Kofax, EMC (Captiva) or IBM (Datacap); and (2) the ability to store images of scanned documents in the repository as "just another" content type in a folder, and to route them through an electronic process.
- **Workflow/business process management (BPM).** This refers to supporting business processes, routing content, assigning work tasks and states, and creating audit trails. The minimum requirement is simple document review and approval workflow. More advanced functionality includes graphical process builders, and serial and parallel routing.
- **Records management.** This allows for long-term retention of content through automation and policies, ensuring legal, regulatory and industry compliance. The minimum requirement is for the

software to enforce retention of critical business documents, based on a records retention schedule. Desired capabilities include certified compliance with standards such as the Department of Defense (DoD) Directive 5015.2-STD, The National Archives (TNA), the Victorian Electronic Records Strategy (VERS) and Model Requirements for the Management of Electronic Records (MoReq2).

- **Web content management (WCM).** WCM controls the content and influences the interactions of a Web experience through the use of specific management tools based on a core repository. This includes content creation functions, such as templating, workflow and change management, and content deployment functions that deliver prepackaged or on-demand content to Web servers. The minimum requirement is a formal partnership with a WCM provider. Native capabilities score higher than partnerships. The relative complexities of provisioning content to users across intranet, extranet and Internet applications are also considered, as are the implications of analytics, social content and delivery models. Several ECM vendors qualify for independent analysis of their WCM functionality (see "Magic Quadrant for Web Content Management").
- **Social content.** This functionality allows for document sharing, collaboration, knowledge management and project team support. Blogs, wikis and support for other online interactions are important components. Social content, including video, is the fastest-growing category of new content in the enterprise. A valuable feature is integrating applications with social media, and managing content to post to social media.
- **Extended components.** These can include one or more of the following: digital asset management, document composition, e-forms, search, content and analytics, email and information archiving, email management, and packaged application integration.

In this Magic Quadrant, these components are weighted as:

- Document management: 15%
- Image-processing applications: 18%
- Workflow/BPM: 22%
- Records management: 13%
- WCM: 7%
- Social content: 15%
- Extended components: 10%

Magic Quadrant

Figure 1. Magic Quadrant for Enterprise Content Management



Source: Gartner (September 2013)

Vendor Strengths and Cautions

Alfresco

Alfresco (www.alfresco.com) has promoted the concept of an open-source ECM since 2005. It has gained modest traction worldwide, with recent appeal to open source in governments, given its compliance to standards. Alfresco continues to be the only vendor with an open-source ECM offering in this Magic Quadrant. Alfresco version 4.1 is available on-premises and in the cloud. Alfresco remains in the Visionaries quadrant due to its embracing open standards, including Content Management Interoperability Services (CMIS) and DotCMIS, a vibrant community, strong roster of implementation partners and technology (CRM, WCM, capture) alliances worldwide, as well as a strong focus on hybrid, cloud and mobile solutions.

Strengths

- Alfresco has made significant efforts to expand its global presence through an increased number and diversity of partners for consulting and implementation. This partnering strategy has increased Alfresco's footprint and helps it achieve significant additional presence in a range of industries.
- Alfresco has kept abreast of market developments by providing hybrid cloud synchronization, which is the ability to synchronize content and metadata between subscription-based Alfresco Enterprise deployments and cloud sites. Alfresco is also focusing on usability, with tagging, categorizing and storing data happening without user intervention.
- A core strength of Alfresco continues to be the openness of its platform. Its inherent architectural approach offers interoperability with Liferay, Drupal, Joomla, Google Docs, Jive, salesforce.com and IBM Connections. Alfresco supports standards such as CMIS and DotCMIS that allow CMIS-compliant clients and repositories to access its repository.

Cautions

- As the decision-making and buying centers of organizations shift to the business, the notion of open source will become less of a differentiator in the content management market. Alfresco has sold successfully mainly to IT roles, especially architects, application developers and OEM technology providers given its predominance as a "platform play" vendor.
- As organizations continue to watch their spending, Alfresco's community edition may see a spike in uptake for departmental or even enterprise requirements. This may erode Alfresco's revenue-generating channels for maintenance or implementation services, especially in emerging geographies.
- Prospects, as well as existing customers, express some confusion with respect to Alfresco's real direction and strategy. Alfresco needs to focus its marketing message to emphasize its unique value, because the competitive market demands that midsize vendors show clear differentiation.

EMC

EMC (www.emc.com) has revitalized its content management strategies and products with Documentum Platform 7, the new release designed to improve usability, scalability and lower total cost of ownership (TCO). It continues to focus on the cloud with EMC OnDemand, and on the integration of Syncplicity, its file sync and share service, with Documentum. Documentum xCP provides the process management capabilities to build transactional content management solutions and, as with the rest of Documentum 7, is easier and less costly to deploy. EMC is focusing on and expanding the capabilities in the rapidly growing mobile space, which is one of the frequent demands from customers.

Strengths

- EMC's content management stack is a set of full-functioned and scalable products that include all the ECM elements — capture, core repository, process management, archive and records management, and document composition capabilities.
- EMC has a strong set of solutions in life sciences, energy and engineering. It continues to work with its partners to expand the number of solutions in other industries.
- EMC provides cloud content management with Documentum, Documentum xCP, Captiva and Document Sciences products, and EMC Documentum D2 — all of which can be deployed in the cloud. EMC's cloud offerings are more mature than many of its ECM competitors.

Cautions

- Although EMC OnDemand is a cloud-based managed service, EMC needs to address additional cloud delivery options to include public cloud to reduce the initial costs.
- The high costs and complexities for Documentum software and services continue to be challenging for some customers. Upgrading to Documentum 7 or deploying EMC OnDemand may help reduce overall costs.
- EMC's strategy on social content management is focused primarily on Syncplicity and integrating SharePoint with Documentum. Its earlier products, CenterStage and eRoom, are no longer considered as strategic collaboration products by EMC.

Ever Team

Ever Team (www.ever-team.com) is an ECM vendor headquartered in Lyon, France. It has a broad portfolio covering the complete content life cycle, including analytics and collaboration. It caters primarily to midsize companies and works through direct, as well as partner, channels. A strategic focus for Ever Team is the Middle East, where it regularly shows up in shortlists against much larger vendors. The recent addition of a strategic partnership with Konica Minolta is likely to open sales opportunities in untapped markets.

Strengths

- Ever Team's EverSuite is a comprehensive end-to-end solution that works well as a coherent whole and boasts APIs that are well-regarded and easy to use.
- Ever Team continues to grow its product portfolio through organic development in line with market needs and improves year over year.
- The products continuously score high with clients on usability, flexibility and customization capabilities, including a wide range of connectors that make the system easy to integrate with other software.

Cautions

- Despite strategic partnerships with Konica Minolta and other partners in Europe, Ever Team needs to do more to grow market awareness around its capabilities.
- Although Ever Team has added collaboration to its portfolio, it is a lightweight solution, relying on SharePoint for collaboration instead of developing strong native capabilities. Ever Team would benefit from connectors to expose EverSuite content to additional enterprise social networks (e.g., IBM Connections, Jive and Yammer).
- Users have cited that the administration interface needs improvement, as it is too complex, is not user-friendly and is a reflection of the high flexibility. Ever Team would do well to improve this.

Fabasoft

Fabasoft (www.fabasoft.com), based in Linz, Austria, is steadily growing its presence in Central and Eastern Europe with a strong UI, and emphasis on the user experience, and hybrid cloud and on-premises solutions. It works closely with the Mindbreeze Enterprise (formerly Mindbreeze Enterprise Search) engine.

Strengths

- Fabasoft continues to develop strong solutions in case management, workflow and records management, while building upon its cloud and collaboration strengths. All components integrate well as the architecture has grown organically.
- Fabasoft's cloud offering is hosted in European data centers and gets excellent feedback from clients for its multitenant cloud and SaaS offerings. The "Cloud First" strategy seems to have come to fruition. A cloud app store enables clients to add functionality easily to their Fabasoft Cloud.
- The technology and the user experience continue to develop strongly and are well above average.

Cautions

- Fabasoft's growth is modest, despite its attractive product range. The change from more on-premises to cloud and SaaS solutions will change the income from license to recurring revenue models. Gartner believes it is in transition and needs to maintain continued growth to remain successful.
- The channel outside Central Europe needs strengthening to allow for continued growth for Fabasoft. It should look for stronger and broader sales channels, especially in North America.
- As a relatively small company, Fabasoft cannot be everything to everyone. A greater level of specialization or vertical focus may be necessary for it to be successful in newer markets.

HP

HP (www.hp.com) gained the assets to compete as an ECM provider through its acquisitions of Tower Software and Autonomy. Its ECM suite includes tools for capture, process automation, records management and governance, documentation, and WCM. The HP Autonomy team within HP Software has been reinvigorated. HP has shown a renewed commitment to marketing and selling ECM, and a deeper focus on customer service and satisfaction.

Strengths

- HP has strong brand awareness in the consumer and enterprise markets as a provider of a broad range of IT products and services. It can leverage this brand equity and its global footprint through a diverse sales and services channel to support organizations' ECM initiatives.
- One of HP's assets is the breadth of its portfolio for content management and related technologies. It markets strong enterprise search and classification tools in the Intelligent Data Operating Layer (IDOL), good WCM, and proven document management, imaging and workflow. It has related assets, such as HP Exstream, for customer communications management. Customers and prospects looking for an infrastructure provider to support a variety of requirements will find this appealing. HP's ECM team is building synergies with these offerings, HP printers and multifunction product (MFP) hardware.
- In the past year, HP began focusing less on the core repositories and individual offerings and more on use cases that involve content in context. Additionally, they have good offerings around information governance, e-discovery and litigation support, leveraging the strong search capabilities from Autonomy.

Cautions

- Many of the products in HP's ECM portfolio were acquired, and some Gartner clients have expressed concern over what they see as aging products. The limited investment in some products under previous owners means HP must work on technology refresh to remain competitive, while simultaneously meeting new demands, especially in mobile and cloud.

- While HP has all of the necessary components to compete effectively as an ECM provider, many of its products are only loosely integrated today. For example, TeamSite and MediaBin lack deep integration with the core document and records management offerings and are sold to different buying audiences, while HP has just begun integrating the BPM and document management products. In some cases, especially records management, HP had multiple offerings that are now being rationalized. Customers need to follow the road maps closely.
- HP must continue the work it has begun — to invest and spend to improve and enrich its ECM software strategy.

Hyland Software

Hyland Software (www.hyland.com), with global headquarters in Westlake, Ohio, continues to execute well in the ECM market due not only to its strong focus on vertical and horizontal solutions, but also to its deep customer focus. Best known for addressing the needs of midmarket customers with OnBase, Hyland is increasing its penetration in larger enterprises, especially in healthcare and higher education. It has had steady growth via organic evolution and acquisitions. The firm has augmented its core offering with the acquisitions of Sire Technologies, a government-focused software vendor with an OnBase Agenda Management solution, and AnyDoc, a document capture and recognition technologies provider.

Strengths

- Hyland has a strong record of application integration, with its Application Enabler technology to integrate with a wide variety of ERP and other line-of-business solutions. In addition, Hyland provides packaged API-level integration to healthcare-specific solutions, such as Epic and Cerner, and leverages BizTalk to build connectors. With OnBase 12 and the newly released OnBase 13, deep integration with Outlook is a capability. Nearly 80% of OnBase functionality can be surfaced through Outlook. Several of these solutions are available as mobile applications.
- Hyland's "sweet spot" has always been midmarket organizations, where it has a loyal and satisfied customer base. OnBase can start small (e.g., in a specific department) and scale up to support larger enterprise needs. For example, it has some very large implementations (over 20,000 users) in healthcare, and with customers managing 15 terabytes of documents.
- A key reason for Hyland's continued growth and marketing penetration has been its vertical domain expertise and deep solution focus, especially in healthcare, higher education and government. These solutions include medical records, transcript capture, and board and committee agenda management, as well as accounts payable.

Cautions

- Hyland has long targeted Latin America in addition to the U.S., but must continue building its international presence, particularly in Europe and the Asia/Pacific region. While it has developed partnerships with HP, Konica Minolta and others, it must continue expanding its partner channel

to include system integrators and independent software vendors to grow its enterprise penetration.

- While Hyland has long provided OnBase via on-premises and SaaS delivery options with functional parity between the two offerings, its cloud offerings are not marketed sufficiently. In an era where cloud-based applications are attracting business buyers, Hyland risks being perceived as "old school" by these emerging buyers if it doesn't invest more in marketing OnBase in the cloud.
- OnBase is a Microsoft-centric solution, and Hyland has embraced .NET and ASP.NET. This may hamper its suitability for organizations with heterogeneous client/server environments. Customers that choose to develop custom applications via the OnBase APIs, rather than by using configuration menus, may need to ensure they have the requisite .NET and ASP.NET skills.

IBM

IBM (www.ibm.com) is the market leader in terms of ECM software revenue. IBM's focus with its broad portfolio of ECM tools is on supporting higher-value use cases, particularly for transactional content and social content management. Key product strategies center on embracing the intersection of social, mobile and content management, as well as the role of analytics and content management in industry solutions such as patient care and fraud investigation.

Strengths

- IBM has undertaken steps to reduce complexity and improve user friendliness for the business user with a new universal UI, Content Navigator. A common frustration for many enterprises embarking on ECM initiatives has been the complexity of the tools and the long deployment cycles. For IT leaders and professionals, IBM has reduced deployment times through its simplified Content Foundation server, a streamlined FileNet P8 repository that combines three engines — process, content and app — into one.
- IBM continues to show vision by focusing on solutions that traverse the existing product silos within IBM: Case Management, Patient Care and Insights, and Defensible Disposal. These solutions build upon the core content and case management foundations, and leverage content and predictive analytics, collaboration and social capabilities.
- IBM's global presence and scale enable it to support multinational enterprises and to be active in mature markets and emerging markets, such as those in the Middle East, Africa and Eurasia.

Cautions

- IBM lacks a robust cloud strategy specific to its core ECM offerings. Gartner expects demand for cloud ECM offerings to grow. For example, Microsoft and many others are targeting midmarket adopters of cloud solutions.

- As it transitions from a product- to a solution-focused provider, IBM faces a number of hurdles. IBM places less emphasis on the individual products, yet its customers are focused on the products and road maps. Many customers with whom Gartner has spoken express confusion over the IBM portfolio and direction for the products they purchased. IBM has traditionally relied on its partner channel to deliver solutions, especially for the FileNet offerings. As IBM and IBM Global Business Services (GBS) start developing and marketing solutions, they risk alienating their partners.
- While IBM has made considerable progress breaking down its internal silos, more needs to be done. It still has too many content management and related repositories — IBM Connections, Web Content Manager, IBM Docs and the three ECM repositories. IBM's ECM messaging concentrates too much on the core ECM tools as the system of record. Yet, IBM has the assets and capabilities across the ECM, WebSphere and Lotus brands to push ECM as a system of engagement and to focus on dynamic uses of content creation and collaboration (e.g., contracts management, bid proposals and projects).

Laserfiche

Laserfiche (www.laserfiche.com), headquartered in Long Beach, California, provides cost-effective and easy-to-deploy ECM products for the midmarket with a focus on document management, records management, imaging and workflow applications. It has a strong installed base in the government, education and healthcare markets. Its two product suites — Laserfiche Rio, targeted at large enterprises, and Laserfiche Avante, targeting small or midsize businesses (SMBs) — fit the needs of different customers. Its products and services are primarily delivered through its partner and reseller channels. The recent release of Laserfiche 9 added improved workflow and expanded mobile capabilities to the product line.

Strengths

- The dual ECM product suites — Laserfiche Rio and Laserfiche Avante — provide a wide range of capabilities for different size organizations along with flexible and cost-effective licensing options.
- Laserfiche's products are easy to implement and upgrade, with low deployment costs. As a result, much of its installed base is on more current releases than many other vendors.
- Customers generally have high levels of satisfaction with Laserfiche's products, service and support. Users are often very positive about their relationships with the company's sales and technical teams.

Cautions

- Laserfiche is challenged to move outside its predominantly midsize customer base. Increasing investments in marketing and messaging are necessary for expanding its reach into other verticals and larger enterprises.
- Laserfiche has limited relationships with the larger system integrators and service providers in the industry.

- Laserfiche continues to have limited presence in Europe.

M-Files

M-Files (www.m-files.com) is a supplier of horizontal and vertical content and quality management solutions. M-Files was founded in 2005 in Finland, where all its product development still occurs. It has established a U.S. subsidiary, and is actively marketing and expanding its geographic coverage.

Strengths

- M-Files' technology is built around an easy-to-use metadata model for file management, permissions and navigation. Files are organized and accessed through metadata. This makes the solution very flexible. Users see files in the context of their unique requirements; the files are not hard-coded to a static folder structure.
- M-Files has several strong vertical use cases in quality management and contract management.
- Next to traditional on-premises solutions, M-Files offers a native Azure cloud solution with the ability to run the solution in a hybrid content management model using the metadata as a filtering and control mechanism.

Cautions

- M-Files still has limited awareness and presence outside its traditional home market, but is rapidly gaining a foothold, especially in the U.S. with a growing partner network. M-Files needs to be careful that the rapid expansion does not come at the expense of its strong showing in expertise and innovation, as larger clients may have different expectations than the current midsize clients.
- The Microsoft-centric architecture with deep integration into Windows at the server level and SQL Server for the database engine supporting the document repository limit the market when clients use or prefer different database engines or Apache Hadoop.
- Although the use of the metadata is extremely well-thought-out and highly flexible, leading to a powerful solution, M-Files needs to find different messages to market, as "metadata driven" messaging may limit its appeal. Instead, it must focus on how these capabilities make the applications perform better and help gain better adoption.

Microsoft

Microsoft (www.microsoft.com) established a leadership presence in the ECM market with SharePoint 2007, grew it in 2010 and builds on this history with the 2013 release. During the last year, Microsoft, with headquarters in Redmond, Washington, has gained traction with SharePoint Online as a component of its cloud-based Office 365. Microsoft's most salient accomplishment has been strong market penetration. Approximately half of Gartner's ECM client interactions involve SharePoint in some manner.

Strengths

- Microsoft has built a strong ecosystem position around SharePoint: Many third-party software vendors offer extensions for SharePoint, and system integrators are generating big business from deployments and customizations.
- SharePoint 2013 has garnered interest among those committed to SharePoint, and Gartner is seeing some migration planning to 2013 from earlier versions. It shows improvements in a number of areas, including embedded search and social interactions.
- SharePoint, often viewed as an information "Swiss Army knife," still has a strong place in many enterprise environments. Microsoft continues to invest in its ECM capabilities with cloud, on-premises and hybrid deployments.

Cautions

- Once SharePoint is installed, organizations are often challenged trying to get the level of adoption they expected. Getting better usability and successful change management concerns many SharePoint shops. Microsoft needs to continue the work it started with SharePoint 2013 for better interfaces and more flexible user experience capabilities.
- Some users continue to say that they expected more native functionality in areas such as administration, backup and recovery, workflow, replication, mobile support and broad usability, but they also express concerns about the details of Yammer's integration.
- While the SharePoint Online offering is gaining interest, many organizations have yet to build knowledge, skills and a general comfort level to move to Microsoft's new SharePoint 2013 development model, leveraging the SharePoint Client-Side Object Model and hosting applications. Microsoft may be pushing many enterprises to make changes faster than they want.

Newgen Software Technologies

Newgen Software Technologies (www.newgensoft.com) is headquartered in New Delhi, India, with offices in five other locations — the U.S., Canada, the U.K., the United Arab Emirates and Singapore — and has 1,100 employees. Newgen Omni Suite 8.0 has several components, including OmniDocs, OmniScan, OmniFlow, Records Management System (RMS) and ZapIn. It is known for industry solutions focusing on enabling claims processing, finance and accounting processes and others. Newgen continues to offer a subset of its solutions as shrink-wrapped options for smaller enterprises. It is extending its reach through a rapidly growing partner network of system integrators. In 2013, Newgen introduced its ECM and BPM suites as public cloud offerings and through other business process outsourcing (BPO) data center providers.

Strengths

- Newgen has made significant investments with sales office expansion in North America and progress into the cloud, offering solutions on public (Amazon Web Services [AWS]), private and BPO deployments (e.g., HP Cloud Map). Newgen's middleware-based product suite gives

organizations the flexibility to integrate it with their infrastructures and support coexistence of platforms.

- Newgen is addressing new use cases related to mobile BPM, and mobile content access and capture. This enables mobile devices on iOS and Android to be an onramp for applications such as case management, customer contact management and CRM.
- Newgen generally gets quite good customer feedback about the quality of its software.

Cautions

- Newgen needs to increase awareness through better positioning and marketing in its home market and in regions it has identified as target opportunities. Newgen often does not show up on shortlists, even though it might fit well.
- Leveraging cloud providers and BPOs could help advance Newgen's growth potential into untapped markets; however, it faces some inconsistency at service levels.
- Clients occasionally see Newgen's product implementations as complex. Gartner clients sometimes cite too great a dependence on professional services or implementation partners that may not have adequate training on Newgen's products and services.

Objective

Objective (www.objective.com) is headquartered in Sydney, Australia, and has sales offices in the U.S., the U.K., New Zealand and Singapore. Objective recently released Objective version 8.1.7, which includes electronic document management, records management and workflow capabilities. It is complemented by various functional add-ons, such as those for search and discovery (an OEM of Exalead CloudView), correspondence management and application integration. Objective's suite of SaaS-based offerings consists of Objective Collaboration and Consultation, and Objective Connect. They appeal to the demands of on-premises and SaaS deployments.

Strengths

- Objective's growing portfolio of government-focused applications is a competitive key differentiator. The applications are supported, tuned and deployed directly through its public sector professional service engagements, sometimes involving partners or system integrators.
- Objective Connect, a SaaS offering, has gained modest momentum, with some governments wanting to securely share content across agencies. A hybrid deployment option can be facilitated through Objective Connect Link to Objective's ECM platform and to SharePoint or to HP Trim for records management.
- Objective's core platform enables integration via Common Object Request Broker Architecture (CORBA), Internet Inter-ORB Protocol (IIOP), Web services and an application integration add-on called Applink Connector. Objective's respective products are compliant with standards such as ISO 15489.1, ISO 15489.2 and ISO 27001, TNA02 (U.K.), and Victorian Electronic Records Strategy (VERS; Australia).

Cautions

- Objective suffers from lack of visibility in the broader ECM market, and even somewhat in its focused area of the public sector. It is showing up less frequently on shortlists than some of the other vendors featured in this research, even in contexts where the Objective offering might be a potential fit. Gartner clients often cite the reasons for excluding Objective's core ECM platform to be aging software, too high a professional services component required, dependence on implementation partners, or difficulty in upgrading to the vendor's newer versions or products.
- Objective has improved the usability of its offerings, but a disparity still exists between its older core ECM platform and newer products, such as Connect, Executive or Discover. It still compares poorly in this respect with offerings from many of the other vendors. It must make usability a higher priority and invest in creating the kind of interface and user experience that will appeal strongly to end users, records managers and administrators.
- The majority of Objective's deployments are in Australia, New Zealand and the U.K. Enterprises in other geographies will need to assess the vendor's services capabilities represented by consultants that are mostly based in those countries. Some customers cite difficulties in hiring specialists well-versed in the Objective platform. Additionally, Objective's revenue growth appears to be basically flat.

OpenText

OpenText (www.opentext.com), headquartered in Waterloo, Ontario, Canada, has positioned itself as an "enterprise information management" company, extending beyond ECM. Acquisitions by OpenText have included a variety of companies, most recently Cordys, a Dutch BPM vendor, and Resonate Knowledge Technologies, a provider of user experience software. OpenText introduced OpenText Cloud to provide managed hosted services and collaboration services, Tempo, and messaging services through EasyLink and RightFax. OpenText's acquisition-centric growth strategy has added companies and technologies to expand its market position.

Strengths

- OpenText has one of the broadest content management product portfolios on the market. It continues to innovate with new product and service introductions. OpenText Cloud and Tempo, its social collaboration and enterprise file sync and share tools, represent important areas on which ECM customers are focused today.
- OpenText's reseller partner agreement with SAP provides a strong sales channel for OpenText and a significant revenue source. Since SAP sells into large enterprises, this gives OpenText more opportunities to capture large enterprise deals. The level of integration and interoperability between SAP and OpenText products provides a competitive advantage for OpenText.
- OpenText is adding more composite content applications, leveraging its Metastorm and Global 360 BPM products, in addition to applications based on its traditional ECM platform.

Cautions

- OpenText's prolific acquisitions have resulted in many overlapping and similar products in areas such as document management, records management, WCM and BPM. Issues over migration path, support and limited product enhancements for some nonstrategic products have been voiced by existing customers.
- The new revenue growth for OpenText has been driven by acquisitions, while sales of new software licenses have grown at a slower pace, indicating a maturing of OpenText's customer base.
- OpenText's acquisitions of Global 360, Metastorm and Cordys have created some confusion for ECM customers that have a strong process focus. OpenText must communicate its process strategy for ECM more clearly to support its customer base, particularly since it has multiple products that do the same thing, sometimes on different platforms or for different industries.

Oracle

Oracle's WebCenter Content is the backbone of its ECM strategy, supplemented by Oracle WebCenter Sites for users who are prioritizing WCM capabilities. These content management tools are complemented by Oracle's Portal offerings, as well as the integration with the Oracle (www.oracle.com) ERP tools.

Strengths

- The size and capabilities of Oracle's sales force and its broad technology stack allow it significant global presence in the ECM market, primarily appealing to existing Oracle customers.
- Integration of Oracle WebCenter with Oracle's software stack — including the rest of the WebCenter portfolio and out-of-box integrations with Oracle E-Business Suite, PeopleSoft, Siebel and Oracle Fusion Applications — provides substantial benefits to Oracle customers.
- Oracle also has a good presence in the adjacent portal market, which can help clients wanting a range of user-facing information tools.

Cautions

- Gartner clients using Oracle WebCenter Content complain about the software having an older look and feel, outdated UI, a lack of fresh enhancements and insufficient sharing of product road map. A new UI was released in the July 2013 11.1.1.8 update of WebCenter Content. In Gartner's opinion, Oracle does not have a clear enough ECM-specific cloud strategy. While many other vendors already offer Electronic File Sync and Share capabilities to complement their ECM environment, Oracle has not released one yet.
- Oracle's vision around an ECM application strategy is not as strong as most other ECM vendors, and, thus, it has recently worked to enrich its set of ECM-based vertical solutions or

applications (for example, Oracle Imaging and Process Management [I/PM] invoice automation, Controlled Document Management for Life Sciences and Employee Onboarding). Enterprises wanting more ECM-based application approaches may want to look at Oracle's partner ecosystem for additional applications or may want consider other vendors.

- Oracle provides separate solutions for ECM (WebCenter Content) and WCM (WebCenter Sites). Previously, WebCenter Content served both roles. Users who invested heavily in WCM with WebCenter Content now have to either consider a migration to WebCenter Sites or find another solution if they want a supported WCM environment. This has caused noticeable concern with organizations in this situation, and Oracle must do a much better job helping these types of clients make a cost-effective migration to WebCenter Sites or risk losing them altogether.

Perceptive Software

Perceptive Software (www.perceptivesoftware.com), a stand-alone software business unit of Lexmark International, continues to show double-digit market growth organically and via acquisitions. It has augmented its core imaging document repository and workflow capabilities with advanced recognition capabilities, search technology, BPM and process analytics, and a cloud-based video content management platform. It has grown internationally and deepened its solution focus, especially in healthcare. Perceptive Software has moved from the Challengers quadrant to the Leaders quadrant due to its strong execution and customer focus.

Strengths

- Perceptive Software continues to focus on horizontal (e.g., accounts payable and contracts management) and vertical solutions, especially for higher education and healthcare. Customers are generally highly satisfied with the product and the ease of deployment.
- Bolstered by the resources of its parent company, Perceptive Software has made a number of acquisitions to augment its core ECM platform and to give it deeper opportunities in key verticals. Two acquisitions in particular, Twistage and Acuo Technologies, give it some unique assets to deepen its solutions for healthcare and higher education.
- Perceptive has continued growing its international presence, particularly in Brazil where Lexmark is strong, and in the Asia/Pacific region. It has continued to attract channel partners, such as Deloitte and Jenzabar.

Cautions

- While its many acquisitions add capabilities or give it the tools to target new opportunities, Perceptive Software needs to better articulate its strategy and road map for the acquired companies and their products. For its traditional ECM base, some synergies are not readily apparent and customers that Gartner has spoken with express concern that the portfolio is getting too complex.
- Perceptive's BPM strategy with the Pallas Athena acquisition could be stronger, particularly in the U.S. The vendor has experienced some management turnover.

- Lexmark and Perceptive have yet to fully deliver on potential synergies between the hardware (MFPs) devices and the software assets. Joint solutions around capture are nascent.

Saperion

Saperion (www.saperion.com) is based in Berlin, Germany, with good traction outside its core markets. It caters to SMBs, but has successfully delivered its technologies to a number of very large international clients with headquarters in Germany. Using direct sales, as well as a partner network, it has a presence in Europe, Asia/Pacific and the Americas. It offers on-premises, as well as SaaS, solutions via a number of local partners. Saperion was acquired by Lexmark on 16 September 2013.

Strengths

- Saperion shows strong presence as an archive in many installations. Its standards-led products integrate easily, and a large number of connectors are available.
- Clients consistently cite product reliability as extremely high, and rate its Microsoft Office/SharePoint integration as extremely strong.
- Saperion gets high marks for ease of installation and configuration.

Cautions

- Saperion continues to sell regularly into large client accounts, with average deal sizes larger than other vendors of a similar size. However, the Saperion ECM Suite is often deployed primarily as an archive, with clients sometimes missing the broader benefits of the full suite of ECM functionality. Saperion needs to promote the expanded ECM capabilities better.
- Quality varies across the partner network, with some partners getting very high marks from clients, while others are not rated as highly.
- Saperion runs the risk of being seen as a pure archiving vendor at most of its large installations. Its SharePoint focus may undermine some of its own product strengths and erode the development effort in areas outside archiving.

Siav

Siav (www.siav.it), founded in 1990, is an Italian software development and IT services company with 250 employees. Its ECM solution focus on electronic document management, workflow, archiving and capture. Its Archiflow suite, currently at version 2012 R1, is the platform base for its vertical applications. It is complemented by Virgilio for records management, Intelligo for image processing and Cartesio for business process intelligence. More than half of Siav's business is concentrated in the government, and a significant proportion of its installed base is in Italy.

Strengths

- Siav built its product with a service-oriented architecture (SOA), providing an avenue for integration with a variety of platforms via Web services. It has an application development component library of connectors as part of its BPM engine, which facilitates interoperability to external sources, even though its solution is Windows only and centered on .NET.
- Siav has made progress into other industries, such as finance, health and utilities, but its largest presence is in the government arena with an extensive list of primarily southern European reference clients.
- Siav has built several industry solutions and aligned its offerings with the needs of the public sector, providing correspondence tracking, constituent self-service and citizen relationship management, much of which can be applied to other industries.

Cautions

- Siav has not penetrated far outside Italy and southern Europe during the past year. Its lack of presence in a major region such as North America will present missed opportunities in a market where competition is growing. Having missed out on the market's growth in 2011 and 2012 will affect Siav's long-term prospects in terms of service and maintenance revenue.
- Siav's Archiflow product provides flexibility to organizations requiring build-out of deep solutions. IT demands extensive technical knowledge and strong professional services, which are challenges to clients outside Siav's core geographic footprint.
- Siav's reliance on SharePoint for social content management, document-centric collaboration, portal, WCM and the UI may undercut its independent value proposition in some use cases.

Software Innovation

Software Innovation (www.software-innovation.com), based in Oslo, Norway, offers traditional on-premises-based and SaaS-based offerings. It has a significant installed base in Scandinavia, and is expanding in Europe due to a growing network of partners. It continues to gain momentum in the ECM market and offers its core platforms (Business 360°, Public 360 ° and ProArc) for a range of case management, technical document management and records management requirements.

Strengths

- Software Innovation's architecture appeals to many companies, because it is Microsoft-centric and delivers highly scalable ECM solutions, which have good workflow capabilities.
- The company's portfolio of ECM solutions for various industries is growing rapidly, with strong public-sector expertise, as well as in engineering and energy.
- The core offerings are fairly easy to configure, and clients have integrated them with other environments. There are also native SharePoint extensions for ECM.

Cautions

- Software Innovation's support is weak compared with other vendors. It needs to improve its help desk significantly.
- Software Innovation needs to work on providing a better user experience layer, as users often state it seems dated.
- Customers sometimes state that better documentation for the various solutions is needed. Software Innovation often does light customization to solutions to meet user requirements, but it needs to document these in greater detail.

SpringCM

SpringCM (www.springcm.com) targets the growing interest in cloud-based ECM focused on application scenarios. SpringCM offers the necessary ECM capabilities, particularly for search, taxonomy and metadata management. It has good integration with salesforce.com.

Strengths

- SpringCM industry solutions appeal to business stakeholders who are looking for an offering to meet their immediate needs. The capabilities include transactional applications and image processing. It is resonating well with salesforce.com users through integration between SpringCM and salesforce.com.
- The SpringCM UI is well-received, and end users require very little training. The company's mobile capabilities and SpringCM Sync Content solution for file access and synchronization are meeting market expectations.
- Recent changes in management and strategy may help SpringCM regain the strength and growth it had as an early mover in the industry.

Cautions

- SpringCM's growth in terms of revenue and marketing must increase for the company to maintain viability and mind share in a market where cloud alone is not enough as a differentiator.
- SpringCM's implementation services and support team must continue to improve. Some customers have noted longer than desired issue resolution times. However, overall product quality seems to be well-received.
- As SpringCM's partner channel continues to grow, it's critical that SpringCM focus on strong training and partner enablement to deliver a consistently high service and support experience for its clients.

SunGard

SunGard (www.sungard.com) provides software and technology services for financial services, education and the public sector. SunGard iWorks BPM has a range of content management capabilities, including document management, imaging, records management and archiving. It serves as a foundation for insurance solutions, and is used primarily by financial services providers and health insurers. SunGard combines iWorks BPM with dedicated insurance consulting services to provide customized solutions.

Strengths

- SunGard's iWorks BPM provides a strong process-centric platform, which serves as the product backbone, with content management capabilities to build out insurance applications.
- SunGard provides content-centric applications that appeal to financial services and insurance customers looking for out-of-the-box functionality.
- SunGard has a strong focus as a services and solution provider for the financial services and insurance sector.

Cautions

- SunGard's iWorks BPM is considered primarily as a vertically focused BPM platform, so it has limited appeal for customers looking for a content management product with broader functionality.
- SunGard's iWorks BPM has a narrow customer base, primarily in insurance, which is not growing. As a result, the majority of its revenue is derived from maintenance and service, rather than from software licenses.
- SunGard's iWorks BPM does not support many of the typical content management standards, such as CMIS for content integration and DoD 5015.2 for records management.

Systemware

Systemware (www.systemware.com) has a product suite with a full complement of ECM components, including output management, image and capture, records management, archiving, and workflow. It has built some unique vertical content solutions, including cloud-based applications in financial services, insurance and healthcare. Systemware Content Cloud is a new delivery option for customers to deploy their applications in the cloud. In 2012, Systemware launched the Digital Delivery Gateway in partnership with Zumbox's Digital Postal Mail and Pitney Bowes' Volly to transform printed bills, statements and other documents for distribution to digital mail providers. This service is in its early stages. Systemware's success still lies in its report and output management part of the business.

Strengths

- While Systemware offers a set of ECM capabilities, its strength is in providing a highly scalable and fully featured report management and archiving platform.
- Systemware has a strong set of industry solutions in financial services, insurance and healthcare. It has started providing Systemware Content Cloud, a cloud-based SaaS alternative for deployment.
- The service and support for Systemware were highly rated by customers who cited the vendor's responsiveness in resolving problems and issues.

Cautions

- Systemware's growth is limited by its marketing and partner channel. Increased customer awareness may lead to increased sales opportunities.
- The adoption of Systemware ECM products has been slow, despite capabilities such as imaging, workflow and DoD 5015.2-certified records management.
- Systemware's customers are based predominantly in North America, with some customers in Latin America. It intends to remain focused on its customers in these geographies.

Unisys

Unisys (www.unisys.com) is a longtime document imaging and workflow provider with its Infolmage offering, now at version 8.2, as well as a leading global system integrator. Its ECM suite addresses the content life cycle from capture to archival. A major focus for Unisys in recent years has been platform modernization with the introduction of a mobile client, CMIS support, and most recently a SaaS strategy and offering. Going forward, Unisys is also focusing on building repeatable solutions for key verticals, such as the recently announced Mortgage Application.

Strengths

- Unisys has a high level of penetration in the government and financial services sectors for mission-critical, high-volume transactional content applications, such as tax revenue processing, employment/unemployment services and mortgage processing. In this market segment, it has a proven track record and a loyal customer base.
- The global reach and scale of Unisys enable it to support customers around the globe, including in emerging markets.
- Mobile Work Manager provides a fully functional mobile client for Apple iPads and iPhones, as well as for Android devices. There are native applications for document capture, process automation and document access.

Cautions

- Unisys' Infolmage focuses mainly on production imaging and workflow use cases that involve capturing, storing and routing static image documents. Thus, enterprises with needs beyond these capabilities, especially those that involve dynamic content or publishing content to a website, will need to look elsewhere or consider Unisys' Infolmage SharePoint Connector.
- Infolmage is a Microsoft-centric solution; Unisys likely will be embracing .NET in a product release slated for later in 2013. This may hamper its suitability for organizations with heterogeneous client/server environments; CMIS support and Web services may be options. Customers and prospects will need to ensure that they have the appropriate .NET skill sets.
- While Unisys is working to reinvigorate its software business, most of its Infolmage revenue has been derived from maintenance and add-on sales to its customer base. It needs to focus more on acquiring new customers and investing in marketing its software to remain a viable ECM software provider.

Xerox

Xerox (www.xerox.com) has strengths generally in SaaS-based transactional content management. Successful offerings are Xerox Transactional Content Manager (XTCM), Xerox mortgage services/ BlitzDocs and Xerox litigation services (OmniX, CategoriX and Viewpoint). Xerox's general business document platform, Xerox DocuShare, continues to be used often in departmental use cases. Xerox is building more solutions leveraging DocuShare and using it as a leverage point in broader fleet management and MFP contracts. Xerox is expanding its services business by leveraging the XTCM SaaS platform in transactional content management offerings.

Strengths

- Xerox's global sales and support strength, as well as its strong services capabilities, has enabled it to deliver a range of ECM applications to its customers.
- Xerox's success with cloud-based approaches to ECM-based applications, including mortgage and litigation services, has validated its vision for cloud-based ECM services.
- Xerox's general ECM offerings, DocuShare and DocuShare CPX, continue to resonate with midsize ECM buyers who are looking for moderately priced ECM capabilities.

Cautions

- Xerox's ECM-related marketing needs to be more aggressive, as the offerings often are not on enterprises' shortlists.
- The market's perception of Xerox as a traditional company continues to hold back growth opportunities as it markets cloud-based offerings, as well as a range of ECM services.
- Xerox must expand the vertical applications around ECM to show further vision and growth. While it has been successful in the mortgage processing and litigation support arenas, it needs to capture more opportunities to continue to grow in ECM.

Vendors Added and Dropped

We review and adjust our inclusion criteria for Magic Quadrants and MarketScopes as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant or MarketScope may change over time. A vendor appearing in a Magic Quadrant or MarketScope one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. This may be a reflection of a change in the market and, therefore, changed evaluation criteria, or a change of focus by a vendor.

Added

We added HP due to its building a significant market presence through the acquisition of Autonomy. HP had some partial ECM offerings; but with the Autonomy acquisition, HP now meets our inclusion criteria for the Magic Quadrant for ECM.

Inclusion and Exclusion Criteria

This year's Magic Quadrant for ECM includes revisions to the evaluation criteria, descriptions and scoring of the functional capabilities, as well as a focus on new combinations of technology, delivery models and vertical-market solutions. We continue to use a threshold of \$10 million in new software license and maintenance revenue to enable us to recognize the growth of SMB, departmental and alternative delivery ECM products.

To appear in this Magic Quadrant, a vendor must meet Gartner's criteria for revenue, geographic presence, functional capabilities and references.

Specifically, a vendor must:

- Have at least \$10 million in total annual content management software revenue (licenses, updates and maintenance). An open-source software vendor must have at least \$10 million in annual customer subscriptions.
- Market its products in at least two major regions — for example, North America and EMEA, or Asia/Pacific and Latin America.
- Have ECM software commercially available, and have references that use its products in production scenarios.
- Have an integrated content management suite with at least four of the components listed above supplied natively; others may be supplied through partners.

Evaluation Criteria

Ability to Execute

Ability to Execute measures how well a vendor sells and supports its ECM products and services on a global basis. In addition to rating product capabilities, we evaluate each vendor's viability, installed base, pricing, customer support and satisfaction, and product migrations from one major release to another.

Although not explicitly identified as a core component, information access or search technology has always been a critical component of an ECM suite, and it plays a big role in helping companies sift through structured and unstructured information. All ECM products ship with a search engine embedded as a core component, so that users can create a full-text index and search the content stored in repositories.

Some vendors have added extended components, such as digital asset management for handling rich media, e-forms, and document and email archiving, and document composition for high-volume generation of customized documents (see Table 1).

Table 1. Ability to Execute Evaluation Criteria

Criteria	Weight
Product or Service	High
Overall Viability	High
Sales Execution/Pricing	Medium
Market Responsiveness/Record	Medium
Marketing Execution	Medium
Customer Experience	High
Operations	Medium

Source: Gartner (September 2013)

Completeness of Vision

Completeness of Vision focuses on a vendor's potential. A vendor might succeed financially in the short term without a clearly defined vision or strategic plan, but it won't become a Leader.

A vendor with average vision anticipates change by accurately perceiving market trends and exploiting technology.

A vendor with superior vision anticipates, directs and initiates market trends, particularly if it integrates its vision for a broad range of areas, and capitalizes on product and service development.

Part of our assessment involves looking at how well each vendor understands changing requirements and market trends. We evaluate vendors on their awareness and adoption of emerging functionality, their technical architecture (for example, standards support, Web services and Web 2.0 capabilities), and their focus and abilities in federating and integrating with other content repositories and applications (see Table 2).

Table 2. Completeness of Vision Evaluation Criteria

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

Source: Gartner (September 2013)

Quadrant Descriptions

Leaders

Leaders have the highest combined scores for Ability to Execute and Completeness of Vision. They are doing well and are prepared for the future with a clearly articulated vision. In the context of ECM, they have strong channel partners, presence in multiple regions, consistent financial performance, broad platform support and good customer support. They are very strong in one or more technologies or vertical markets. Leaders deliver a suite that addresses market demand for direct delivery of the majority of core components, although these are not necessarily owned by them, tightly integrated, unique or best-of-breed in each area. In our assessments, we look for demonstrated enterprise deployments; integration with other business applications and content repositories; incorporation of social, cloud and mobile capabilities; and vertical-process and horizontal-solution focus. Leaders should drive market transformation. There are six Leaders in this year's Magic Quadrant.

Challengers

Challengers offer good functionality and have a substantial number of installations, but lack the vision of Leaders. They typically don't possess all the core ECM components. Instead, they use partnerships to round out their suites, or they ignore some markets altogether. Challengers can lack a broad ECM focus or geographic coverage, but they execute well, despite product limitations. Oracle is the only Challenger in this year's Magic Quadrant.

Visionaries

Visionaries may offer all capabilities natively or partner with other vendors for several core ECM components. In some cases, Visionaries will need to integrate their acquisitions into their product suites. They typically show a strong understanding of the market and anticipate shifting drivers. They may lead efforts relating to standards, new technologies or alternative delivery models, but they have less ability to execute than the Leaders. They are building their market presence.

Niche Players

Niche Players typically focus on specific categories of ECM technology (such as transactional content management), midmarket buyers, or supplements to the offerings of business application or stack providers. This category may include vendors that are still ramping up their overall ECM efforts, or that have neither the Completeness of Vision nor the Ability to Execute to break out of the Niche Players quadrant. Some Niche Players may be "boutiques" that serve only certain regions, industries or functional domains, not the broader market.

Context

Gartner clients often use ECM to realize a range of productivity goals, including:

- **Improve effectiveness.** Better data quality can lead to better decisions, as time and energy are not wasted. Project team support environments have a strong base in ECM. Knowledge repositories based on ECM can help companies build competitive differentiation, innovate better and realize better customer service.
- **Reduce operational cost.** Electronic management and delivery of client information using e-bill presentment and multichannel approaches to engage prospects and clients with relevant information requires Web channel optimization using WCM tools. Costs can be reduced by consolidating diverse repositories of content and getting off legacy content management tools where ongoing maintenance costs can be significant.
- **Optimize business processes.** ECM began with document imaging and document management of high-volume information flowing through repetitive processes. These transactional types of ECM environments are critical to driving efficiencies in departments for mission-critical processes.
- **Achieve regulatory compliance and e-discovery goals.** Companies look to ECM to provide a full life cycle approach to information — from creation to destruction or archiving. ECM tools

provide this level of support for many enterprises, beginning with integration with the Microsoft Office Suite for managing new and collaboratively authored content, to using inherited predefined metadata to automate the eventual records categorization. Companies use these tools to demonstrate best efforts at organizing and managing their information in a proactive manner to meet legal needs.

- **Attract and retain customers.** A Web technology approach based on WCM enables enterprises to use the Web for a range of dynamic information-based interactions. WCM can be used to drive interactive channels to prospects and customers. Publishing and leveraging social media and socially mediated content is just one newer use of WCM technologies.

The context of ECM has shifted from a focus on efficiencies and compliance to one that emphasizes impact and tangible business outcomes.

Market Overview

ECM continues to demonstrate value and growth, as the market grew 7.2% in 2012 to a worldwide market size of \$4.7 billion. Many enterprises are moving well beyond the basic uses of ECM (such as secure file storage in organized libraries) to tackle deeper business requirements that need strong process efficiency as well. This has led organizations to increasingly regard ECM as an environment for solutions that fit their business needs.

In addition to this focus on solutions, more ECM vendors are offering a lightweight cloud-based environment to address emerging market needs and possibly to prevent their client bases from exploring the popular cloud-based file sharing environments, which only offer a fraction of the full functionality of ECM. This area of technology may become a common feature in ECM systems during the next few years. As the use of ECM begins to increase on mobile devices, we expect to see a generational makeover, with ECM moving further away from its roots in networked back-office environments.

Recommended Reading

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

"How Gartner Evaluates Vendors and Markets in Magic Quadrants and MarketScopes"

"Magic Quadrant for Web Content Management"

"Strategic Road Map for Enterprise Content Management"

"Tablets and Smartphones Are Changing How Content Is Created, Consumed and Delivered"

"Market Share Analysis: Enterprise Content Management, Worldwide, 2012"

Evaluation Criteria Definitions

Ability to Execute

Product/Service: Core goods and services offered by the vendor for the defined market. This includes current product/service capabilities, quality, feature sets, skills and so on, whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.

Overall Viability: Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood that the individual business unit will continue investing in the product, will continue offering the product and will advance the state of the art within the organization's portfolio of products.

Sales Execution/Pricing: The vendor's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support, and the overall effectiveness of the sales channel.

Market Responsiveness/Record: Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the vendor's history of responsiveness.

Marketing Execution: The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This "mind share" can be driven by a combination of publicity, promotional initiatives, thought leadership, word of mouth and sales activities.

Customer Experience: Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways customers receive technical support or account support. This can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups, service-level agreements and so on.

Operations: The ability of the organization to meet its goals and commitments. Factors include the quality of the organizational structure, including skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis.

Completeness of Vision

Market Understanding: Ability of the vendor to understand buyers' wants and needs and to translate those into products and services. Vendors that show the highest degree of vision listen to and understand buyers' wants and needs, and can shape or enhance those with their added vision.

Marketing Strategy: A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the website, advertising, customer programs and positioning statements.

Sales Strategy: The strategy for selling products that uses the appropriate network of direct and indirect sales, marketing, service, and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base.

Offering (Product) Strategy: The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature sets as they map to current and future requirements.

Business Model: The soundness and logic of the vendor's underlying business proposition.

Vertical/Industry Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments, including vertical markets.

Innovation: Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes.

Geographic Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries as appropriate for that geography and market.

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