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The Forrester New Wave™: Cloud Content Platforms — Multitenant SaaS, Q3 2019

The 13 Providers That Matter Most And How They Stack Up

by Cheryl McKinnon
July 18, 2019

Why Read This Report

In Forrester's evaluation of the emerging market for multitenant cloud content platforms, we identified the 13 most significant providers in the category — AODocs, Box, Citrix, Dropbox, Egnyte, Fabasoft, Google, GRM Information Management, Laserfiche, M-Files, Microsoft, Nuxeo, and OpenText — and evaluated them. This report details our findings about how well each vendor scored against 10 criteria and where they stand in relation to each other. Enterprise architects can use this review to select the right partner for their cloud content management needs.

Key Takeaways

Box And Microsoft Lead The Pack
Forrester's research uncovered a market in which Box and Microsoft are Leaders; Google, Dropbox, GRM Information Management, Fabasoft, AODocs, and Laserfiche are Strong Performers; Citrix, M-Files, and Nuxeo are Contenders; and Egnyte and OpenText are Challengers.

App Design Tools, AI, And Governance Capabilities Are Key Differentiators
Customers want the flexibility to tailor their content apps with design and development tools. Cloud content platforms must also provide governance and security capabilities to protect information and serve as systems of record. AI is driving rapid innovation across the vendor stack.

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The 13 Providers That Matter Most And How They Stack Up

by Cheryl McKinnon
with Daniel Hong and Caleb Ewald
July 18, 2019

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Agility And Speed Drive The Cloud Content Platform Market

Two markets have collided. Traditional enterprise content management (ECM) vendors are rearchitecting their platforms to be cloud native, while vendors with heritage in cloud enterprise file sync and share have pivoted to broader content repository services. This market overlap has resulted in a new segment: cloud content platforms. New vendors, with purpose-built content platforms, have also joined this growing, competitive space. The pace of cloud adoption for content management continues to rise, and we expect that 33% of overall ECM revenue will be software-as-a-service (SaaS) in 2019.[1]

Only 22% of global software decision makers describe their content management deployment as only on-premises.[2] However, there are many delivery models for cloud content services — hosted, private, hybrid, single-, or multitenant — and each offers its own advantages.[3] The multitenant cloud model offers specific characteristics that customers value. Global software decision makers report that when they adopted SaaS, they achieved benefits including better business agility, automated delivery of features and fixes, deployment speed, and cost reduction.[4]

Cloud Content Platforms — Multitenant SaaS Evaluation Overview

The Forrester New Wave™ differs from our traditional Forrester Wave™. In the New Wave evaluation, we assess only emerging technologies, and we base our analysis on a 10-criterion survey and a 2-hour briefing with each evaluated vendor. We group the 10 criteria into current offering and strategy (see Figure 1). We also review market presence.

We included 13 vendors in this assessment: AODocs, Box, Citrix, Dropbox, Egnyte, Fabasoft, Google, GRM Information Management, Laserfiche, M-Files, Microsoft, Nuxeo, and OpenText (see Figure 2 and see Figure 3). Each of these vendors:

› **Offers a multitenant SaaS cloud content platform.** Forrester looked at platforms that have been generally available in the market for a minimum of one year. We did not evaluate other cloud delivery models, such as hosted or managed services, single tenant, or private clouds.

› **Demonstrates a steady pace of innovation.** Each vendor demonstrates an active road map and ongoing investment for the cloud content platform we evaluated.

› **Has customer references.** Each vendor must provide references that use the multitenant SaaS content platform we evaluated in a production environment.

› **Actively sells to large enterprises.** Forrester defined a large enterprise as having more than 5,000 employees; we did not include vendors focused on small businesses or the midmarket.

› **Has active interest among Forrester clients.** We focused on vendors that are most relevant to Forrester clients, as shown by the frequency of client requests.

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FIGURE 1 Assessment Criteria

Assessment criteria	Platform evaluation details
Library and repository services	How suitable is the platform as an enterprise system of record? How well does the platform scale (number of users, volume)? How well does the product support library services such as document management, search, metadata, and integration with office tools? How well does the vendor support migration?
Collaborative content services	How well does the platform support collaboration around content? How well does the platform support the inclusion of external parties for collaboration? How well does the platform enable team or project workspaces? Does it provide integrations with common voice, chat, or video collaboration tools?
Transactional content services	How well does the platform support digital process automation? What types of workflow does it provide? How well does it support capture, including ingestion of imaged/scanned documents and mobile? How well can it use data extracted from captured documents? Does it provide packaged apps?
Governance and security services	How well does the product support security, retention, or privacy policies? How well does the vendor support encryption? Does it provide options for key management? How well does it analyze content for sensitive data? Does it have data centers for data residency laws? How well does it provide resilience?
Iterative feature delivery and continuous improvement	How well does the product support ongoing fixes? How well does the vendor ensure clients are on current versions? How well does it use data for feature delivery? How well is the vendor able to meet regulated industry needs for application auditing? How well does the vendor provide user adoption data?
Application design and development tools	How well does the platform support app design and development needs? How well does it support nondevelopers? How well does it support developers with low-code or development frameworks? How broad are the APIs? How well does the vendor provide code samples and documentation?

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FIGURE 1 Assessment Criteria (Cont.)

Assessment criteria	Platform evaluation details
Intelligent content services	How well does the vendor support artificial intelligence, machine learning, or other automation capabilities? How well does the vendor support automated categorization/tagging? How well does the vendor support continuous learning from user behavior to optimize productivity?
Vision	Does the vendor have a compelling and credible three-year vision for cloud content services relative to competitors? Does the vendor's approach to pricing and professional services offer flexibility to enterprise buyers? What is the overall company focus on content platforms versus other products?
Road map	What is Forrester's level of confidence in the vendor's road map in terms of the vendor making its solutions more competitive for enterprise buyers compared with other vendors in this evaluation?
Market approach	Is the vendor executing a successful go-to-market for large enterprises (more than 5,000 employees)? How long has the vendor been providing this multitenant SaaS cloud content platform? How many new customers has the vendor acquired in the past 12 months? What is the customer retention for the past fiscal year?

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FIGURE 2 Forrester New Wave™: Cloud Content Platforms — Multitenant SaaS, Q3 2019

THE FORRESTER NEW WAVE™

Cloud Content Platforms — Multitenant SaaS

Q3 2019

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FIGURE 3 Vendor QuickCard Overview

Company	Library and repository	Collaborative content	Transactional content	Governance and security	Iterative delivery/improvement	App design/dev tools	Intelligent services	Vision	Road map	Market approach
Box	⌃	⌃	＝	⌃	⌃	＝	＝	⌃	⌃	⌃
Microsoft	⌃	⌃	＝	⌃	⌃	＝	⌃	＝	⌃	⌃
Google	＝	⌃	⌄	＝	⌃	＝	⌃	＝	⌃	＝
Dropbox	⌃	⌃	⌄	⌄	＝	⌄	＝	⌃	＝	⌃
GRM Information Management	＝	⌄	⌃	＝	⌃	⌃	⌄	＝	＝	⌃
Fabasoft	＝	＝	⌃	⌃	＝	⌃	＝	＝	＝	＝
AODocs	⌃	⌃	⌃	＝	＝	⌃	⌃	＝	⌄	＝
Laserfiche	＝	⌄	⌃	⌃	＝	⌃	＝	＝	＝	＝
Citrix	＝	＝	＝	＝	＝	＝	⌄	＝	＝	＝
M-Files	＝	＝	＝	＝	＝	＝	⌃	⌃	⌄	⌄
Nuxeo	＝	⌄	＝	⌄	⌄	＝	＝	⌃	＝	⌄
Egnyte	⌄	＝	＝	⌃	＝	⌄	＝	⌄	＝	⌄
OpenText	⌄	＝	⌄	⌄	⌄	⌄	⌄	＝	⌃	⌄

⌃ Differentiated   ＝ On par   ⌄ Needs improvement

Vendor QuickCards

Forrester evaluated 13 vendors and ranked them against 10 criteria. Here's our take on each.

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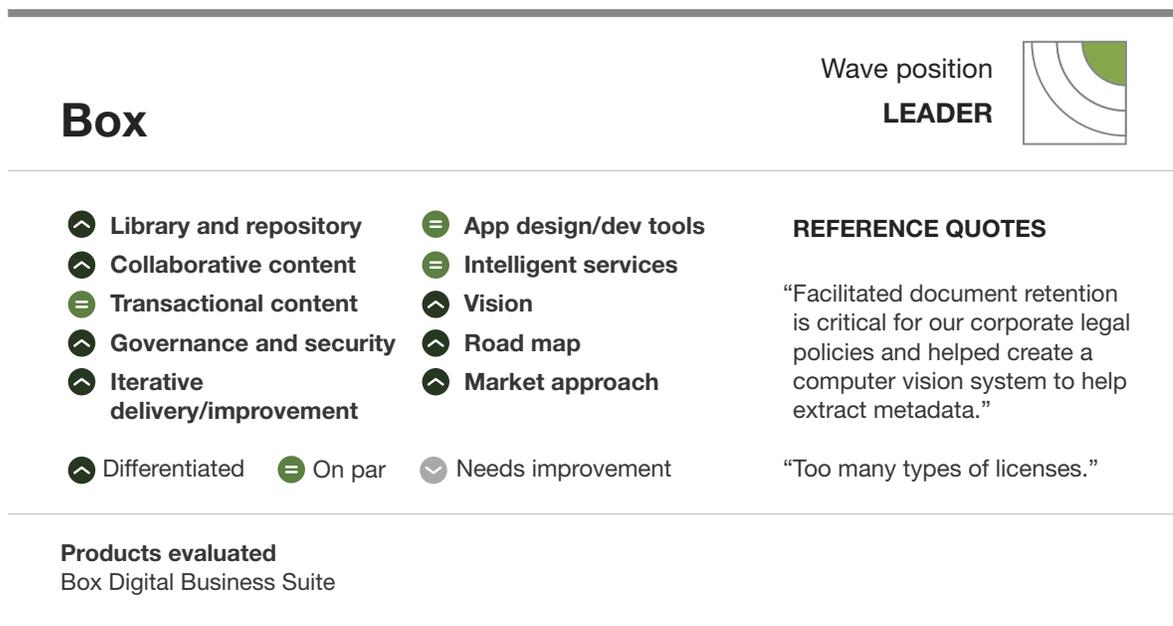The 13 Providers That Matter Most And How They Stack Up

Box: Forrester's Take

Our evaluation found that Box (see Figure 4):

› **Leads the pack with collaboration, security, and governance capabilities.** Box offers comprehensive collaboration and document repository services buoyed by robust security capabilities such as key management and anomaly detection. Box prioritizes data center and infrastructure certifications.

› **Still needs to enhance workflow and simplify packaging.** Current workflow is thin; however, a relaunch of its Relay process automation services will fill this gap. Box must simplify its various SaaS editions and growing app portfolio.

› **Is the best fit for companies that need to balance governance and innovation.** Solid governance and security services serve regulated industries; companies in these industries can use Box to explore best-of-breed AI and machine learning (ML) to enrich and enhance their content.

Box Customer Reference Summary

Box garners high marks from customers for its search features and secure file sharing. Customers report high satisfaction with technical services but express concerns over total cost of ownership.

FIGURE 4 Box QuickCard

Box

Wave position
LEADER

⌃ Library and repository	═ App design/dev tools	**REFERENCE QUOTES**
⌃ Collaborative content	═ Intelligent services	
═ Transactional content	⌃ Vision	"Facilitated document retention is critical for our corporate legal policies and helped create a computer vision system to help extract metadata."
⌃ Governance and security	⌃ Road map	
⌃ Iterative delivery/improvement	⌃ Market approach	

⌃ Differentiated   ═ On par   ⌄ Needs improvement

"Too many types of licenses."

Products evaluated
Box Digital Business Suite

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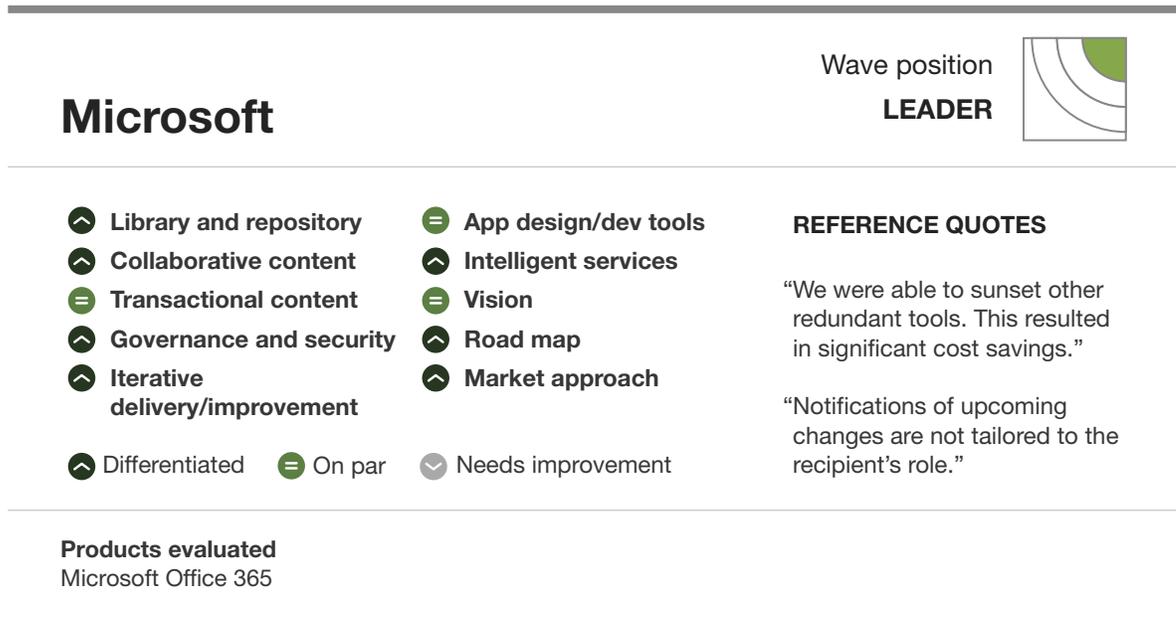
Microsoft: Forrester's Take

Our evaluation found that Microsoft (see Figure 5):

› **Leads the pack with its global scale and support for the full content life cycle.** Microsoft has blazed a trail, showing large enterprises that cloud is the safe place for content. Robust and comprehensive authoring, collaboration, and governance services appeal to all verticals.

› **Still needs to improve its enablement for nontechnical users.** The breadth and depth of content and process capabilities in Office 365 can be confusing to users trying to figure out the best tool to use for communication, collaboration, or file storage.

› **Is the best fit for companies that want a single source of cloud content services.** While highly regulated organizations may need specialized capabilities for advanced requirements, Microsoft offers cloud content services to meet the needs of many common use cases.

Microsoft Customer Reference Summary

Microsoft enables customers to be current on features and fixes with a steady pace of updates. Customers value tight integration with authoring tools but are less satisfied with retention features.

FIGURE 5 Microsoft QuickCard

Microsoft

Wave position
LEADER

⌃ Library and repository	⌃ App design/dev tools
⌃ Collaborative content	⌃ Intelligent services
= Transactional content	= Vision
⌃ Governance and security	⌃ Road map
⌃ Iterative delivery/improvement	⌃ Market approach

⌃ Differentiated   = On par   ⌄ Needs improvement

REFERENCE QUOTES

"We were able to sunset other redundant tools. This resulted in significant cost savings."

"Notifications of upcoming changes are not tailored to the recipient's role."

Products evaluated
Microsoft Office 365

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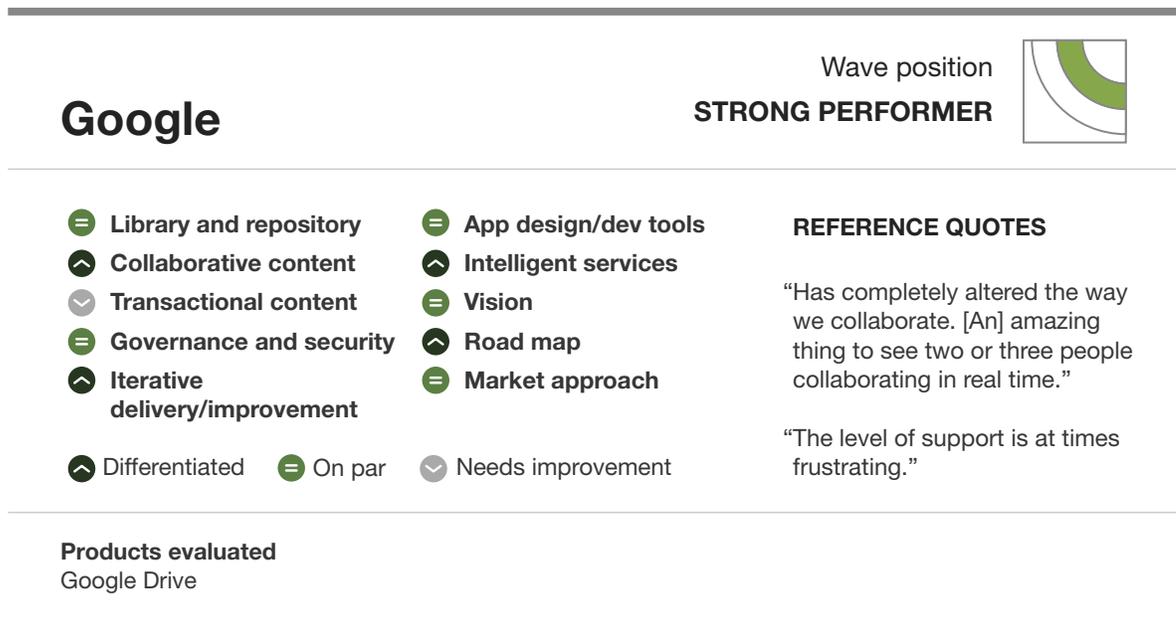The 13 Providers That Matter Most And How They Stack Up

Google: Forrester's Take

Our evaluation found that Google (see Figure 6):

› **Offers robust content authoring and collaboration with smart recommendations.** Google Drive can stand alone as a content repository and scale for large volumes and file sizes. User productivity is enhanced by ML that proactively suggests content.

› **Must invest in more transactional content services to stay competitive.** Workflow, forms, and app design tools are thin. Document approval capabilities are part of Google's near-term road map.

› **Is a good fit for firms that want cost-effective innovation.** A consumption-based pricing model makes Google Drive more economically palatable and an attractive choice. Innovation in AI and ML is an active area on the vendor's short-term road map.

Google Customer Reference Summary

Customers rate collaboration, mobile support, and smart recommendations highly, and they view Google as a transformative content platform. Clients expressed concern over technical support services.

FIGURE 6 Google QuickCard

Google

Wave position
STRONG PERFORMER

⬒ Library and repository	⬒ App design/dev tools
⌃ Collaborative content	⌃ Intelligent services
⌄ Transactional content	⬒ Vision
⬒ Governance and security	⌃ Road map
⌃ Iterative delivery/improvement	⬒ Market approach

⌃ Differentiated   ⬒ On par   ⌄ Needs improvement

REFERENCE QUOTES

"Has completely altered the way we collaborate. [An] amazing thing to see two or three people collaborating in real time."

"The level of support is at times frustrating."

Products evaluated
Google Drive

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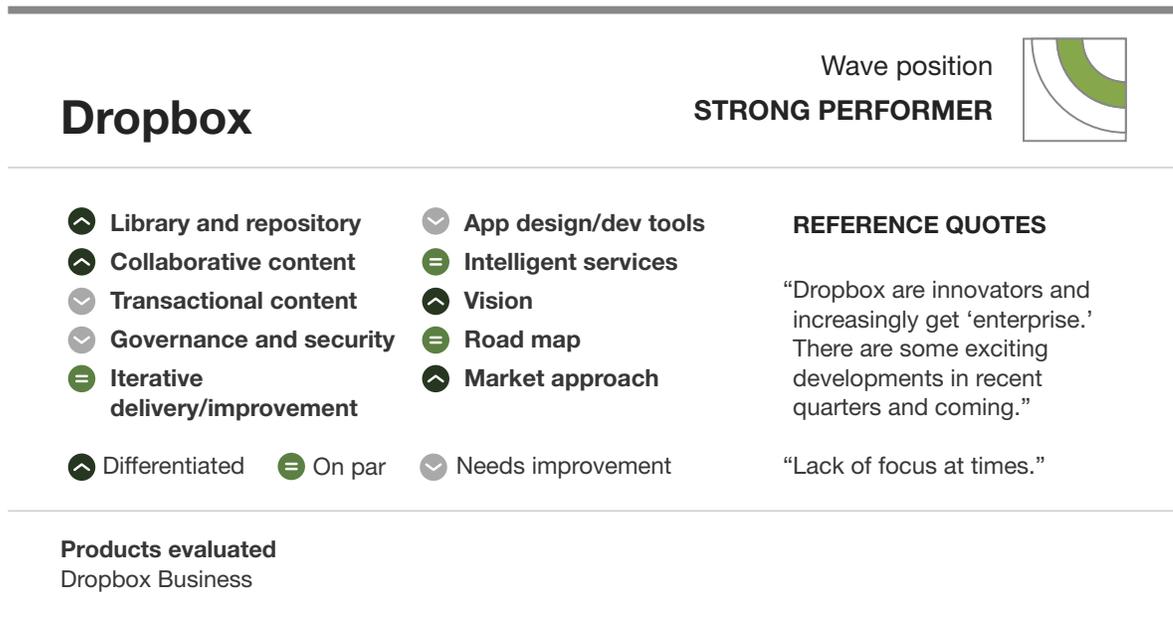
Dropbox: Forrester's Take

Our evaluation found that Dropbox (see Figure 7):

› **Provides high-performance document management and collaboration at scale.** Dropbox is architected for speed and handling high volumes of files, including large formats such as rich media. Ease of use is a core principle, and collaboration features are rich.

› **Is thin on app design tools and transactional content services.** Workflow, forms, and design tools are available via its acquisition of HelloSign but must now integrate with the platform. Dropbox must enhance its go-to-market for enterprises and improve awareness of its offering.

› **Is a good fit for firms with large volumes and simple processes.** Organizations ready to move document management to the cloud and that need to collaborate with external parties will appreciate Dropbox's usability, performance, and focus on user experience.

Dropbox Customer Reference Summary

Customers are highly satisfied with search, mobile apps, technical support, and service uptime. They were somewhat dissatisfied with the vendor's content life-cycle/retention capabilities.

FIGURE 7 Dropbox QuickCard

Dropbox

Wave position
STRONG PERFORMER

- ⌃ **Library and repository**
- ⌃ **Collaborative content**
- ⌄ **Transactional content**
- ⌄ **Governance and security**
- ＝ **Iterative delivery/improvement**

- ⌄ **App design/dev tools**
- ＝ **Intelligent services**
- ⌃ **Vision**
- ＝ **Road map**
- ⌃ **Market approach**

⌃ Differentiated   ＝ On par   ⌄ Needs improvement

REFERENCE QUOTES

"Dropbox are innovators and increasingly get 'enterprise.' There are some exciting developments in recent quarters and coming."

"Lack of focus at times."

Products evaluated
Dropbox Business

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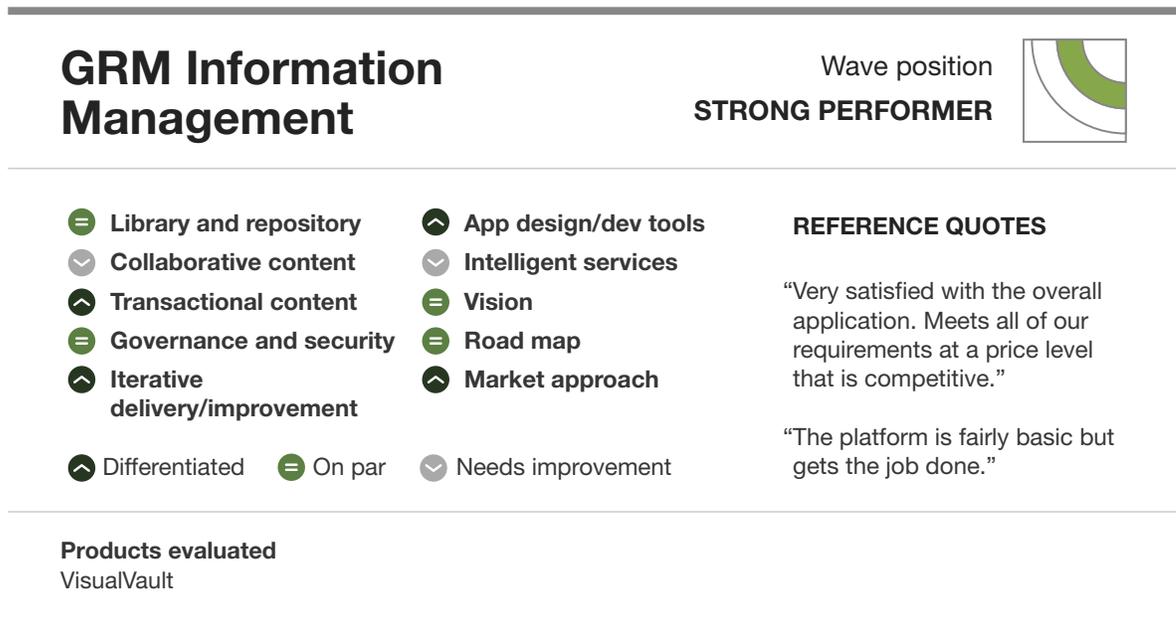
GRM Information Management: Forrester's Take

Our evaluation found that GRM Information Management (see Figure 8):

› **Provides rich process automation and app design tools.** GRM's VisualVault has strong workflow and forms capabilities that companies can use to rapidly develop content-rich apps. It can serve both B2B and B2C use cases with a range of development and design tools.

› **Is thin on overall collaborative content services.** GRM provides limited capabilities for native content authoring and collaboration, but it coexists with best-of-breed tools.

› **Is a fit for enterprises that need governance embedded in their app design platforms.** VisualVault is a scalable, secure cloud platform well suited for high-volume, structured content processes, including those that serve external users.

GRM Information Management Customer Reference Summary

Customers give high praise for life-cycle capabilities and forms, including upload requests from external parties. Mobile is an area of lower satisfaction. Customers see GRM as cost effective.

FIGURE 8 GRM Information Management QuickCard

GRM Information Management

Wave position
STRONG PERFORMER

⊜ Library and repository	⌃ App design/dev tools
⌄ Collaborative content	⌄ Intelligent services
⌃ Transactional content	⊜ Vision
⊜ Governance and security	⊜ Road map
⌃ Iterative delivery/improvement	⌃ Market approach

⌃ Differentiated ⊜ On par ⌄ Needs improvement

REFERENCE QUOTES

"Very satisfied with the overall application. Meets all of our requirements at a price level that is competitive."

"The platform is fairly basic but gets the job done."

Products evaluated
VisualVault

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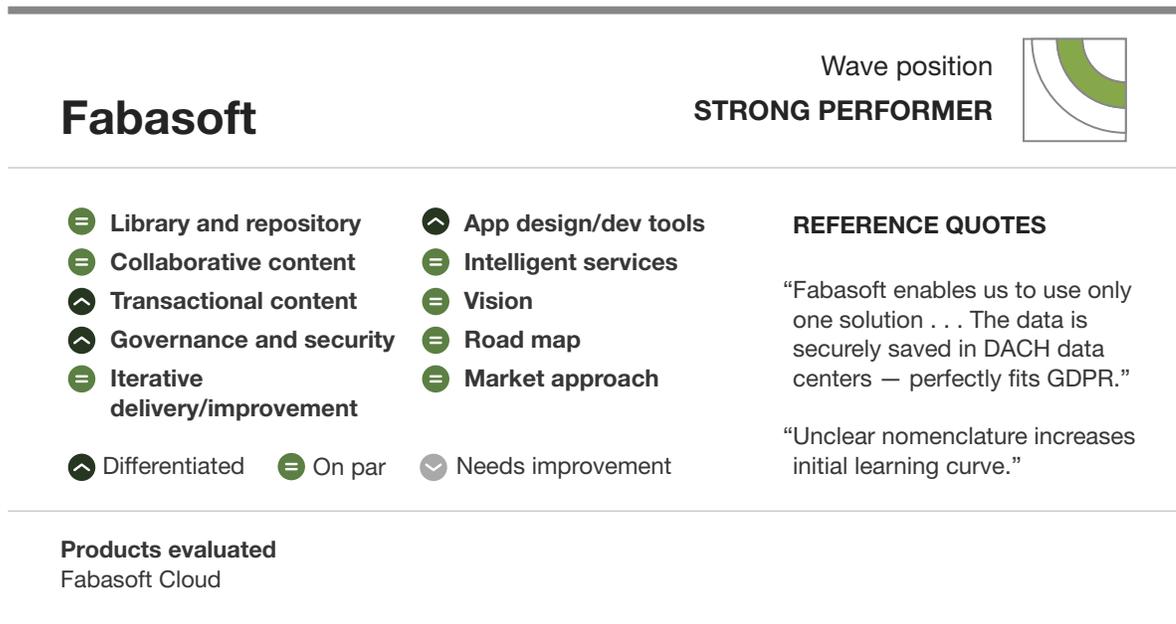The 13 Providers That Matter Most And How They Stack Up

Fabasoft: Forrester's Take

Our evaluation found that Fabasoft (see Figure 9):

› **Offers well-balanced transactional and governance services.** Fabasoft provides a strong set of document and process management capabilities and a robust platform built to meet stringent EU data residency requirements.

› **Has low brand recognition outside of Europe, which limits global growth.** Fabasoft may miss shortlist opportunities with its focus on the European market, particularly German-speaking countries.

› **Is a good fit for EU-based firms and global companies with a strong EU presence.** The vendor offers a feature-competitive content platform with a strong track record of assuring data residency of content in countries and verticals with stringent requirements, such as the public sector.

Fabasoft Customer Reference Summary

Customers express high satisfaction with mobile, technical services, workflow, and app design/ development tools. The default UI and search can come with a learning curve for new users.

FIGURE 9 Fabasoft QuickCard

Fabasoft

Wave position
STRONG PERFORMER

⊜ Library and repository	⌃ App design/dev tools
⊜ Collaborative content	⊜ Intelligent services
⌃ Transactional content	⊜ Vision
⌃ Governance and security	⊜ Road map
⊜ Iterative delivery/improvement	⊜ Market approach

⌃ Differentiated   ⊜ On par   ⌄ Needs improvement

REFERENCE QUOTES

"Fabasoft enables us to use only one solution . . . The data is securely saved in DACH data centers — perfectly fits GDPR."

"Unclear nomenclature increases initial learning curve."

Products evaluated
Fabasoft Cloud

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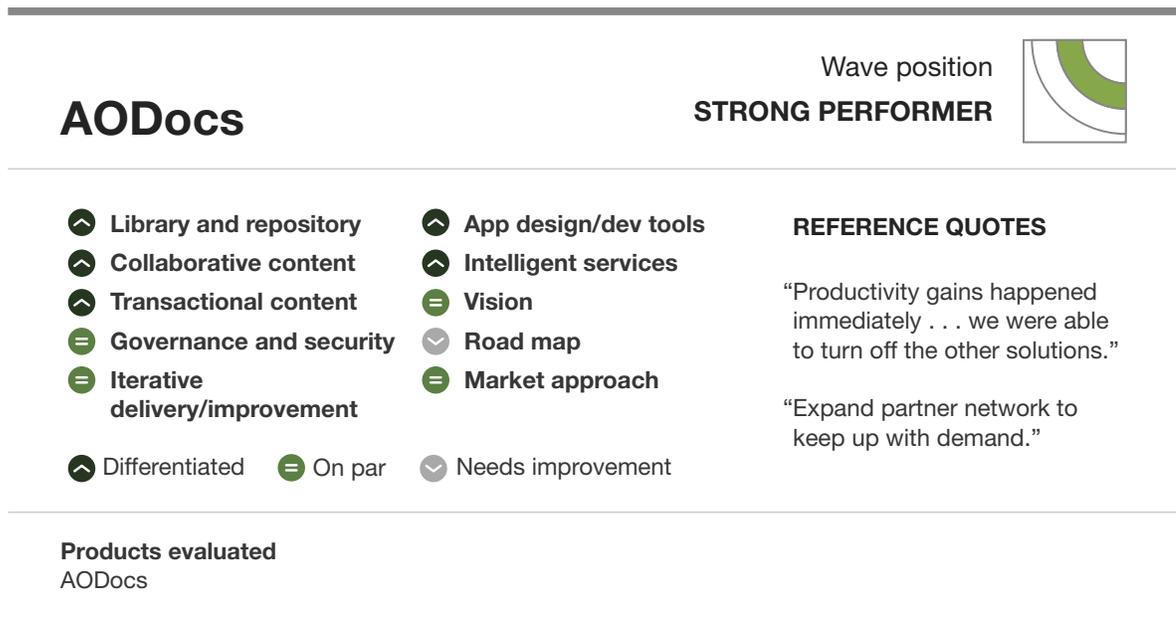The 13 Providers That Matter Most And How They Stack Up

AODocs: Forrester's Take

Our evaluation found that AODocs (see Figure 10):

› **Provides a well-integrated set of collaborative, process, and intelligent services.** AODocs provides a broad set of services that build on the scale of Google Drive — its back-end repository. Strong design and development tools enable a powerful app platform.

› **Still needs to build market awareness outside of the Google ecosystem.** Any organization can use AODocs — it is not dependent on an existing G Suite deployment. AODocs, as a small, newer entrant in this market, must find resources to build market awareness and traction.

› **Is a good fit for companies that want ease of deployment and robust reporting.** Regulated industries find AODocs' workflow, automation, auditing, and reporting capabilities to be a good fit for their organizational needs. Solid life-cycle management services also suit these clients.

AODocs Customer Reference Summary

AODocs allows customers to spin up content-rich applications quickly and easily. Customers want the vendor to invest in a broader partner and integrator ecosystem as it grows.

FIGURE 10 AODocs QuickCard

AODocs

Wave position
STRONG PERFORMER

- ⌃ **Library and repository**
- ⌃ **Collaborative content**
- ⌃ **Transactional content**
- ⊜ **Governance and security**
- ⊜ **Iterative delivery/improvement**

- ⌃ **App design/dev tools**
- ⌃ **Intelligent services**
- ⊜ **Vision**
- ⌄ **Road map**
- ⊜ **Market approach**

⌃ Differentiated   ⊜ On par   ⌄ Needs improvement

REFERENCE QUOTES

"Productivity gains happened immediately . . . we were able to turn off the other solutions."

"Expand partner network to keep up with demand."

Products evaluated
AODocs

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Laserfiche: Forrester's Take
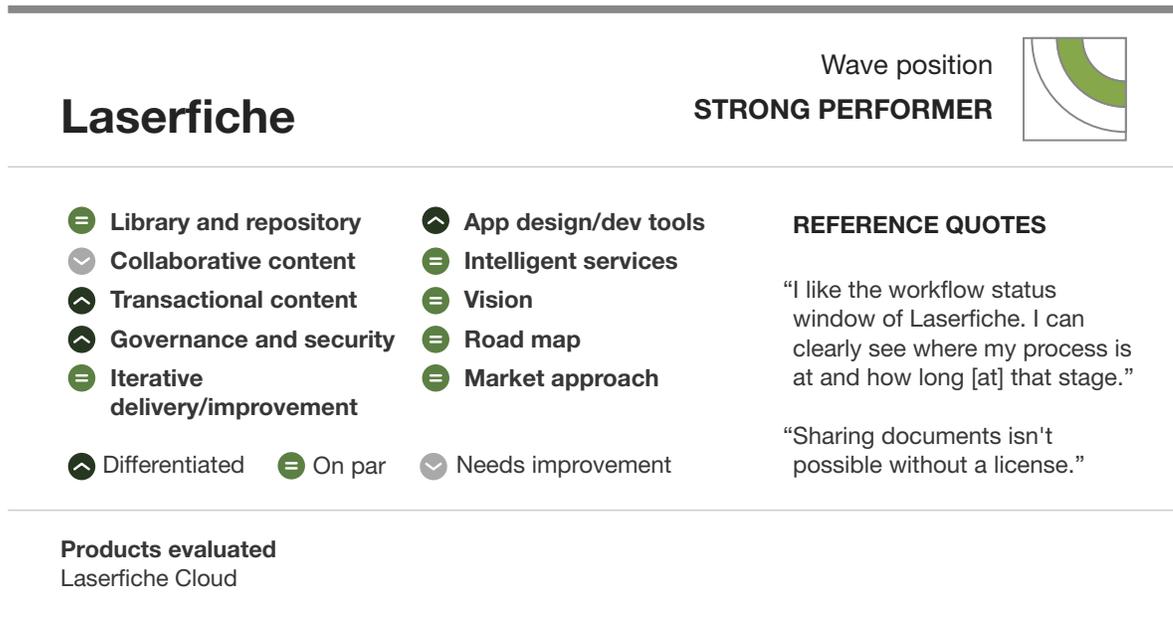
Our evaluation found that Laserfiche (see Figure 11):

› **Provides a robust workflow, strong app design, and development tools.** Laserfiche offers strong transactional content services — workflow, forms, capture, and robotic process automation. Its template and design tools give users flexibility; they can tailor apps for specific needs.

› **Can improve its collaboration capabilities.** Laserfiche is a step behind in document-centric collaboration. It supports comments and annotations, but discussions and file-sharing tools are thin. Deeper integration with web office tools will come later in 2019.

› **Is a good fit for companies that need life-cycle management and process automation.** Laserfiche offers records management capabilities at near parity with mature on-premises systems. Clients in Laserfiche's target verticals benefit from prebuilt solution templates.

Laserfiche Customer Reference Summary

Customers report high satisfaction with search, metadata flexibility, retention management, technical support, and app development tools but lower satisfaction with collaboration.

FIGURE 11 Laserfiche QuickCard

Laserfiche

Wave position
STRONG PERFORMER

⊜ Library and repository	⌃ App design/dev tools	**REFERENCE QUOTES**
⌄ Collaborative content	⊜ Intelligent services	
⌃ Transactional content	⊜ Vision	"I like the workflow status window of Laserfiche. I can clearly see where my process is at and how long [at] that stage."
⌃ Governance and security	⊜ Road map	
⊜ Iterative delivery/improvement	⊜ Market approach	"Sharing documents isn't possible without a license."

⌃ Differentiated   ⊜ On par   ⌄ Needs improvement

Products evaluated
Laserfiche Cloud

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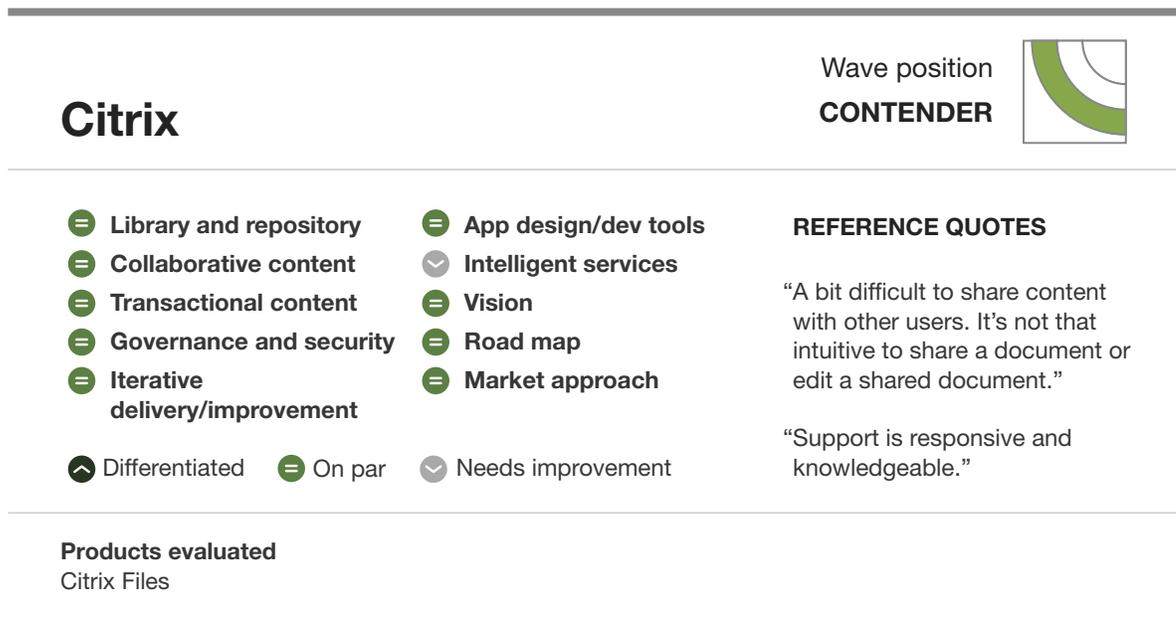
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Citrix: Forrester's Take

Our evaluation found that Citrix (see Figure 12):

› **Provides a solid set of collaboration and process automation capabilities.** Citrix Files is a competitive document sharing and collaboration offering that includes workflow, task, and retention management.

› **Risks losing focus on its own core content services.** Citrix now delivers a cohesive digital workspace bundle. Its own content store, however, is one part of a broader stack. The broader workspace offering is required to get full benefits of AI and other recent innovations.

› **Will appeal to firms attracted to its broader workspace vision.** Organizations that want cloud content storage but must also cope with other on-premises or cloud repositories will benefit from Citrix and its focus on security, auditing, and user productivity.

Citrix Customer Reference Summary

Customers are satisfied with Citrix's mobile support, secure file sharing, and task management capabilities. They did, however, report some concern over usability and the pace of innovation.

FIGURE 12 Citrix QuickCard

Citrix

Wave position
CONTENDER

⊜ **Library and repository**	⊜ **App design/dev tools**
⊜ **Collaborative content**	⌄ **Intelligent services**
⊜ **Transactional content**	⊜ **Vision**
⊜ **Governance and security**	⊜ **Road map**
⊜ **Iterative delivery/improvement**	⊜ **Market approach**

⌃ Differentiated   ⊜ On par   ⌄ Needs improvement

REFERENCE QUOTES

"A bit difficult to share content with other users. It's not that intuitive to share a document or edit a shared document."

"Support is responsive and knowledgeable."

Products evaluated
Citrix Files

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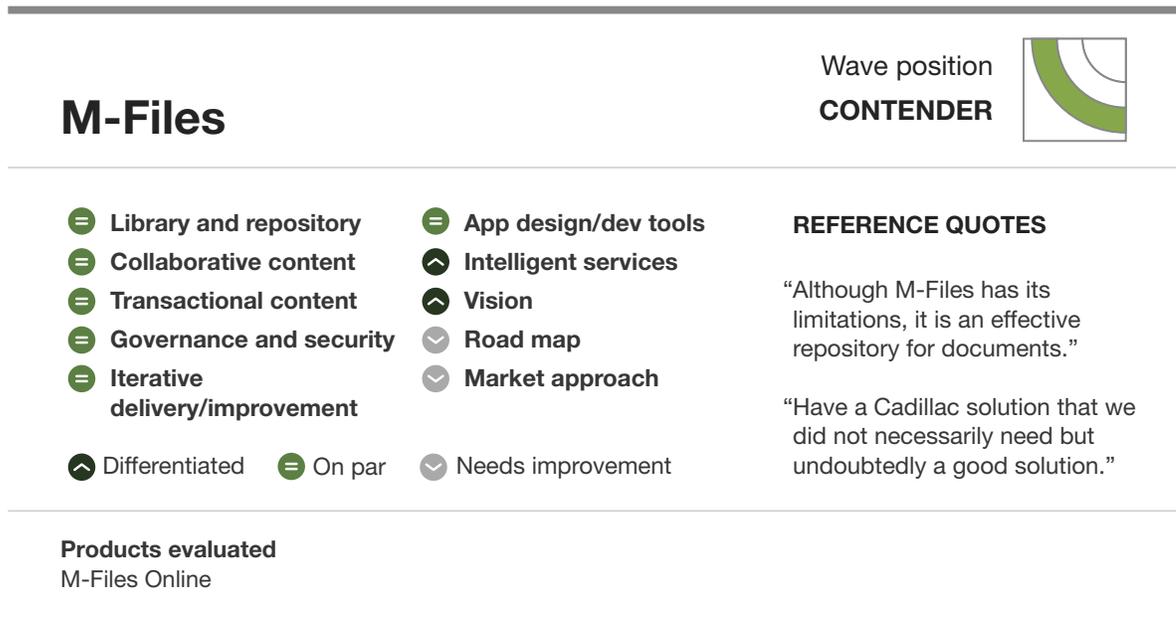The 13 Providers That Matter Most And How They Stack Up

M-Files: Forrester's Take

Our evaluation found that M-Files (see Figure 13):

› **Offers a modern content platform with intelligent content services.** M-Files' SaaS edition uses Azure cloud services at the back end. This provides more flexibility to scale than its on-premises offering. Strong intelligence and federation services are differentiators.

› **Can improve the usability of its workflow and collaboration capabilities.** Default user interfaces can feel complex, and the solution's metadata-first model, while powerful, can come with a learning curve for users.

› **Is a good fit for businesses that want early adoption of intelligent content services.** M-Files delivers ML and natural language processing to content inside its repository, but it can also federate search and retention policies to other content sources.

M-Files Customer Reference Summary

Customers are highly satisfied with search and secure file sharing. However, total cost of ownership and time to realize ROI were areas of concern.

FIGURE 13 M-Files QuickCard

M-Files

Wave position
CONTENDER

- ⊜ Library and repository
- ⊜ Collaborative content
- ⊜ Transactional content
- ⊜ Governance and security
- ⊜ Iterative delivery/improvement

- ⊜ App design/dev tools
- ⌃ Intelligent services
- ⌃ Vision
- ⌄ Road map
- ⌄ Market approach

⌃ Differentiated   ⊜ On par   ⌄ Needs improvement

REFERENCE QUOTES

"Although M-Files has its limitations, it is an effective repository for documents."

"Have a Cadillac solution that we did not necessarily need but undoubtedly a good solution."

Products evaluated
M-Files Online

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The Forrester New Wave™: Cloud Content Platforms — Multitenant SaaS, Q3 2019
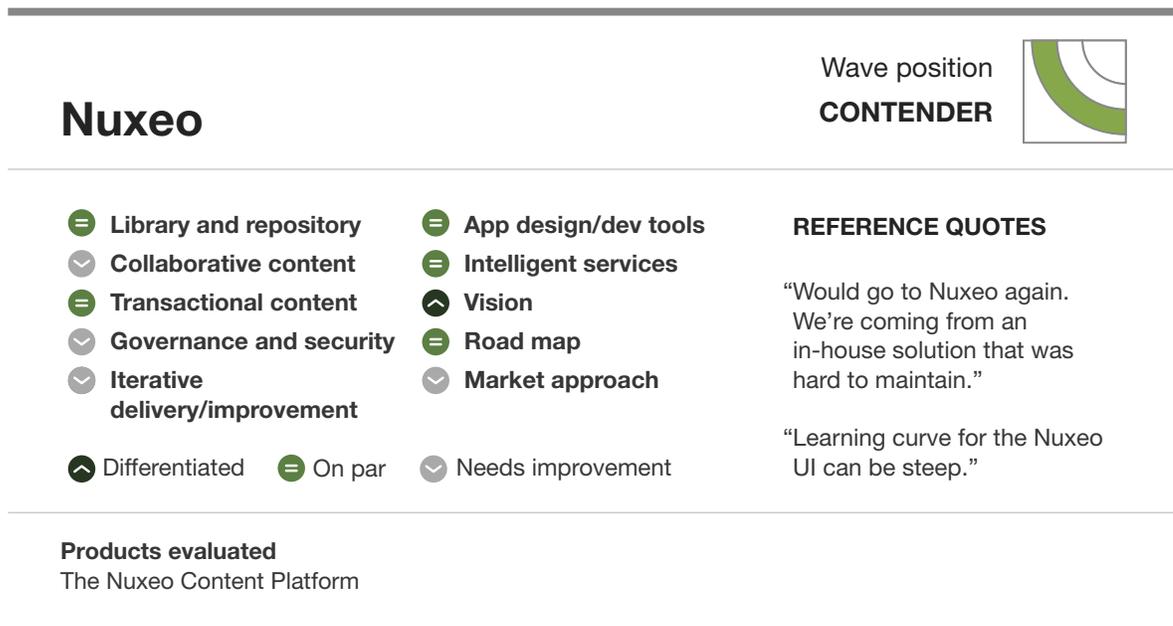The 13 Providers That Matter Most And How They Stack Up

Nuxeo: Forrester's Take

Our evaluation found that Nuxeo (see Figure 14):

› **Offers a robust platform driven by open APIs and an integration-friendly architecture.** Built on Amazon Web Services (AWS) as its infrastructure-as-a-service, Nuxeo's cloud edition offers solid repository services designed for app dev and design. It also scales for large environments and large file formats.

› **Must accelerate investment in governance and security to stay competitive.** Nuxeo's multitenant SaaS offering is relatively new in the market. It currently lacks common cloud security certifications for its platform.

› **Will appeal to tech-savvy firms that want to use cloud for a competitive edge.** Nuxeo targets large enterprises in regulated industries that seek a cutting-edge content platform to differentiate themselves, including adoption of AI and ML in the near term.

Nuxeo Customer Reference Summary

Customers rate search, metadata flexibility, and basic retention capabilities highly. They also value Nuxeo's automation capabilities for customer-facing use cases but attest to a steep learning curve.

FIGURE 14 Nuxeo QuickCard

Nuxeo

Wave position
CONTENDER

⊜ Library and repository	⊜ App design/dev tools	**REFERENCE QUOTES**
⌄ Collaborative content	⊜ Intelligent services	
⊜ Transactional content	⌃ Vision	"Would go to Nuxeo again. We're coming from an in-house solution that was hard to maintain."
⌄ Governance and security	⊜ Road map	
⌄ Iterative delivery/improvement	⌄ Market approach	"Learning curve for the Nuxeo UI can be steep."

⌃ Differentiated   ⊜ On par   ⌄ Needs improvement

Products evaluated
The Nuxeo Content Platform

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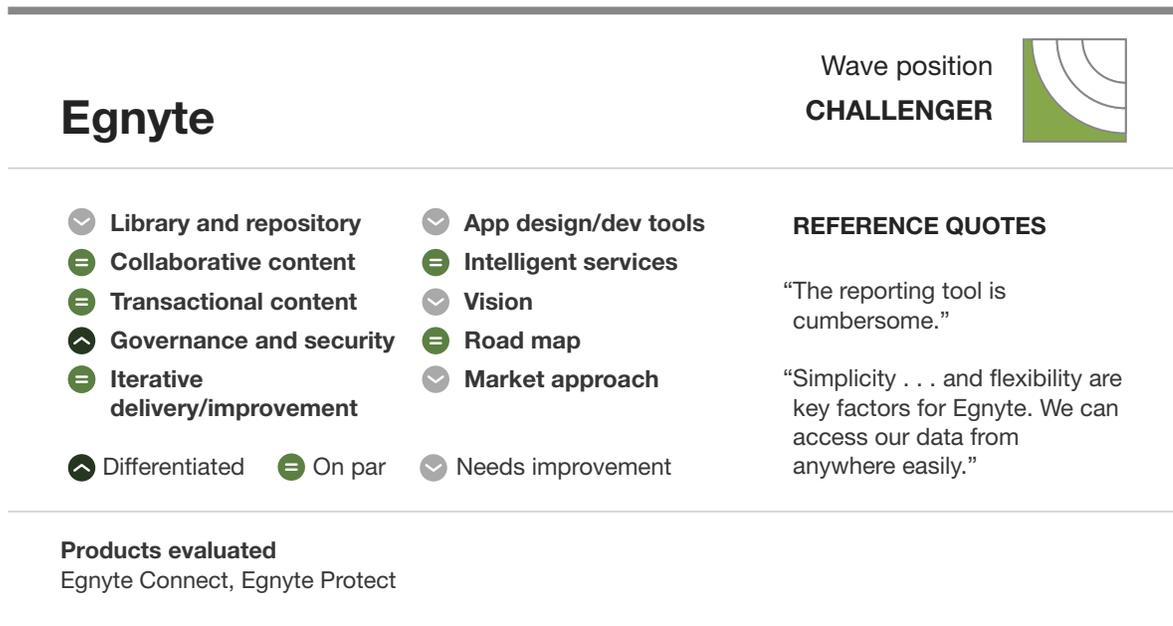The 13 Providers That Matter Most And How They Stack Up

Egnyte: Forrester's Take

Our evaluation found that Egnyte (see Figure 15):

› **Invests in security, governance, and data protection to complement collaboration.** Egnyte's key strength is a rich set of governance services, including a library of prebuilt algorithms to detect personally identifiable information and other confidential data in content.

› **Must improve in overall repository services and process automation.** Egnyte is evolving from a hybrid enterprise file sync and share provider to a cloud content platform. Current offerings are relatively weak in document library and transactional content services.

› **Appeals to security-conscious firms beginning their cloud road maps.** Retention and security policies are strong, and Egnyte's hybrid connectors to other content stores help clients take a phased approach to cloud.

Egnyte Customer Reference Summary

Customers gave high ratings for search, collaboration, and secure sharing, but they reported some usability concerns with admin reporting and dashboards.

FIGURE 15 Egnyte QuickCard

Egnyte

Wave position
CHALLENGER

- ⌄ **Library and repository**
- ⊜ **Collaborative content**
- ⊜ **Transactional content**
- ⌃ **Governance and security**
- ⊜ **Iterative delivery/improvement**

- ⌄ **App design/dev tools**
- ⊜ **Intelligent services**
- ⌄ **Vision**
- ⊜ **Road map**
- ⌄ **Market approach**

⌃ Differentiated   ⊜ On par   ⌄ Needs improvement

REFERENCE QUOTES

"The reporting tool is cumbersome."

"Simplicity . . . and flexibility are key factors for Egnyte. We can access our data from anywhere easily."

Products evaluated
Egnyte Connect, Egnyte Protect

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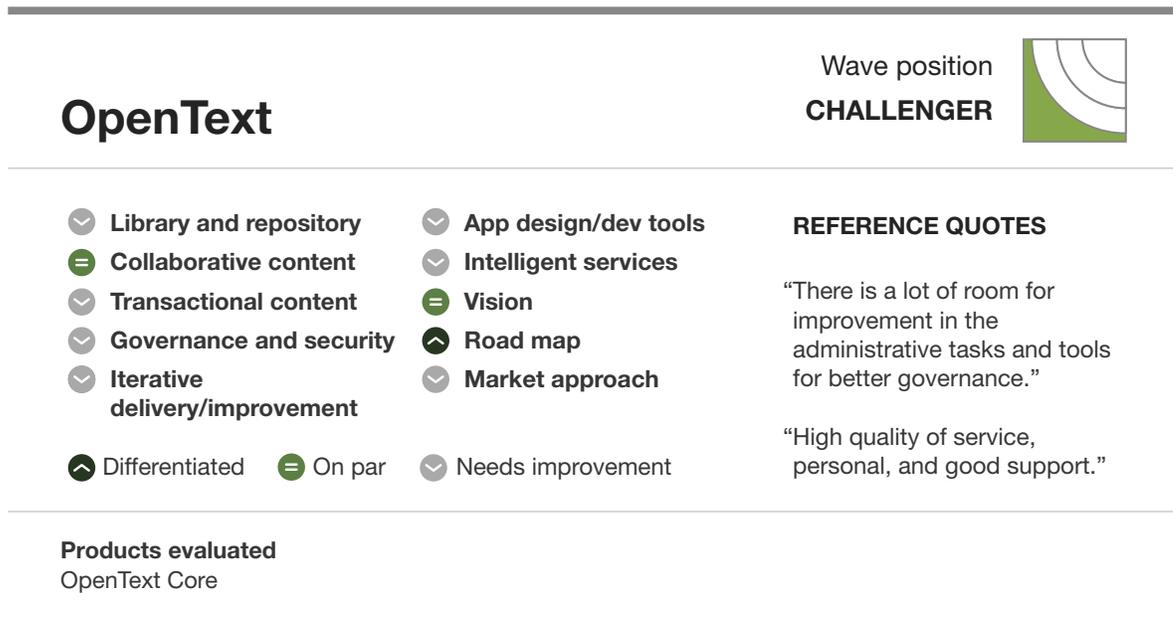
OpenText: Forrester's Take

Our evaluation found that OpenText (see Figure 16):

› **Executes on a cloud-native road map to keep pace with customer and partner needs.** OpenText delivers a set of document collaboration and productivity apps, branded "Core," on its next-generation OT2 content platform, designed for specific line-of-business use cases.

› **Still has work to do before OT2 is a customer-ready platform.** This next-generation platform is a work in progress, with more open access for partners and customers expected over the next several quarters. A limited set of Core apps are gaining early adopters now.

› **Appeals to clients committed to OpenText and its strategic partners.** Core apps will appeal to existing customers seeking cloud-native content collaboration as well as clients that want integrated content apps for enterprise platforms, such as SAP.

OpenText Customer Reference Summary

Customers like OpenText's support services and value Core's dashboard views. However, they also noted feature gaps in document management, collaboration, and task management.

FIGURE 16 OpenText QuickCard

OpenText

Wave position
CHALLENGER

⌄ Library and repository	⌄ App design/dev tools
⊜ Collaborative content	⌄ Intelligent services
⌄ Transactional content	⊜ Vision
⌄ Governance and security	⌃ Road map
⌄ Iterative delivery/improvement	⌄ Market approach

⌃ Differentiated   ⊜ On par   ⌄ Needs improvement

REFERENCE QUOTES

"There is a lot of room for improvement in the administrative tasks and tools for better governance."

"High quality of service, personal, and good support."

Products evaluated
OpenText Core

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Supplemental Material

The Forrester New Wave Methodology

We conducted primary research to develop a list of vendors that met our criteria for the evaluation and definition of this emerging market. We evaluated vendors against 10 criteria, seven of which we based on product functionality and three of which we based on strategy. We also reviewed market presence. We invited the top emerging vendors in this space to participate in an RFP-style demonstration and interviewed customer references. We then ranked the vendors along each of the criteria. We used a summation of the strategy scores to determine placement on the x-axis, a summation of the current offering scores to determine placement on the y-axis, and the market presence score to determine marker size. We designated the top-scoring vendors as Leaders.

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Integrity Policy

We conduct all our research, including Forrester New Wave evaluations, in accordance with the Integrity Policy posted on our website.

Endnotes

[1] See the Forrester report "The Global Tech Market Outlook For 2019 To 2020."

[2] Source: Forrester Analytics Global Business Technographics® Software Survey, 2018.

[3] Customers should prioritize their own requirements when considering cloud for their content management road map. A private cloud or single-tenant instance may be desirable for firms with the capacity to manage more of their own infrastructure or that want to choose their own preferred public cloud provider. For example, Alfresco has a deep partnership with AWS. Several vendors offer a managed service or hosted model, including Hyland Software and IBM. Other vendors, such as Optimal Systems, provide a cloud-native content platform that partners deliver as private cloud or multitenant SaaS.

[4] Source: Forrester Analytics Global Business Technographics Software Survey, 2018.

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