IDC MarketScape

IDC MarketScape: Worldwide Intelligent Content Services 2026 Vendor Assessment

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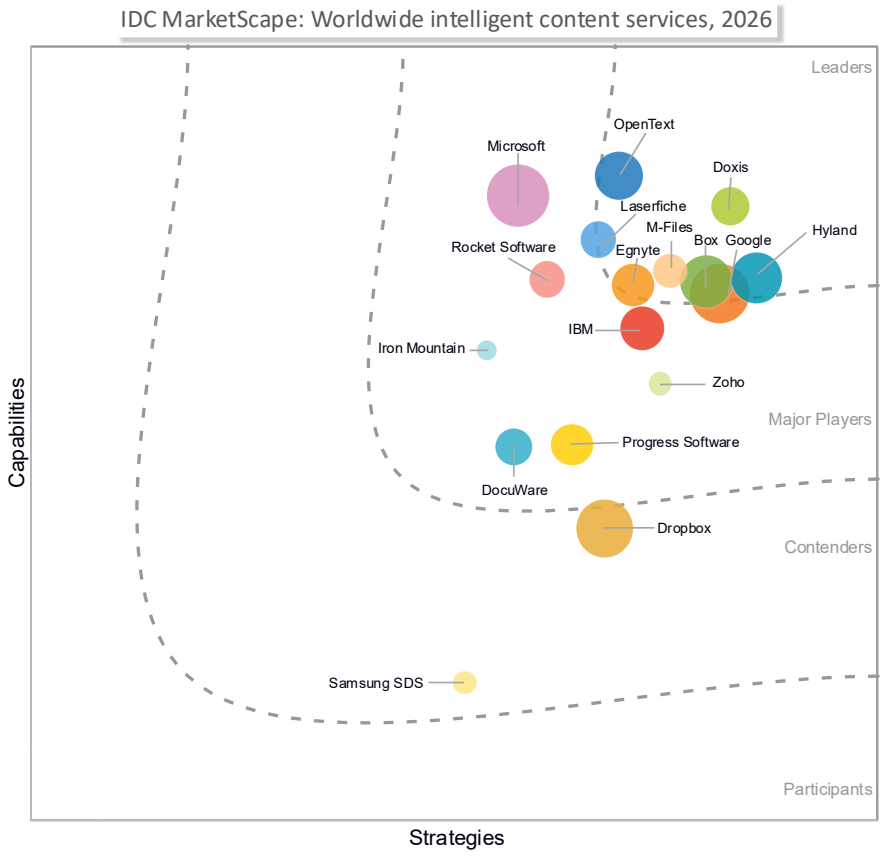
THIS EXCERPT FEATURES IRON MOUNTAIN AS A MAJOR PLAYER

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape: Worldwide intelligent content services vendor assessment



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Please see the Appendix for detailed methodology, market definition, and scoring criteria.

ABOUT THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Intelligent Content Services 2026 Vendor Assessment (Doc #US54137426).

IDC OPINION

Content management is shifting from a passive system of record to the foundation that AI — and now AI agents — act on, and that shift is redefining what "content services" means. The traditional model was built around human workflows, with people navigating folders, applying metadata, routing approvals, and searching by keyword.

Those human workflows still matter, and AI needs to operate alongside them, which requires the equivalent of system access, decision authority, and machine-readable structure — capabilities a user interface (UI) alone doesn't provide. Why? Because content is the core context on which successful human and AI outcomes depend.

Vendors transform unstructured documents into structured, AI-consumable formats, enriching content with extracted entities, classifications, and relationships so it becomes searchable by meaning rather than keyword. Unstructured content then becomes AI ready rather than merely stored. This is the foundational layer, and enrichment, vector stores, and embedding features are becoming a standard part of the content stack, enabling semantic retrieval and reasoning.

New connectivity standards are emerging, particularly MCP where agents read and act on content systems without custom integration middleware. Rather than every vendor building bespoke agent connectors, MCP lets an agent navigate a content model natively, similar to how APIs standardized system-to-system integrations.

With this evolution, content platforms must govern and orchestrate AI behaviors. This means audit trails and monitoring for AI actions and permission models that extend existing access controls. Agentic AI adds a new risk surface. An agent with overly broad content access can expose sensitive information or take actions a human reviewer never would have approved. The vendors moving fastest here are building agent governance directly into the content platform rather than treating it as an add-on.

Taken together, content earns the label "intelligent" only when it stops being merely stored and retrieved and becomes the context layer AI depends on to reason, retrieve, and act reliably. For buyers, the practical evaluation question is how a vendor makes content AI

ready in a scalable and trusted framework. How is my enterprise content curated, enriched, accessible, and governed?

However, not every automation opportunity requires AI, let alone agentic AI. Many of the manual processes or bottlenecks that buyers are trying to solve can still be handled with straightforward rules-based logic. Vendors should be evaluated on whether they can identify and prioritize these simpler wins alongside their AI and agentic capabilities, not just the latter.

The risk of overindexing on AI messaging is that organizations either delay automating obvious, low-complexity processes while waiting for a more sophisticated AI rollout, or they apply AI to a problem that a conditional rule would have solved more reliably and more cheaply. The vendors best positioned to deliver near-term value are the ones that treat AI as one tool among several, applied where it earns its complexity, rather than as the default answer to every automation question.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

Any vendor participating in this IDC MarketScape had to meet the following inclusion criteria:

- The vendor generated $40+ million in annual content services applications revenue in 2025 from a commercially supported business packaged offering as reported in IDC's Worldwide Semiannual Software Tracker.
- The products evaluated must have been in production with paying customers for at least 12 months.
- The product is considered "horizontal," and the vendor targets most industries.
- The vendor has a global presence, operating in at least Europe, North America, and the Asia/Pacific regions.
- The solution can be delivered in either a public cloud, private cloud, or hybrid cloud (i.e., not solely on premises).
- The vendor offers AI/ML, generative AI (GenAI), and agentic capabilities that are GA.

ADVICE FOR TECHNOLOGY BUYERS

Assess a vendor's product vision

Ask vendors for specific dates, scope, and how a stated road map item ties back to a customer pain point. A vendor that can point to a named feature, a target release window, and the problem it solves is showing real planning discipline:

- **For admin experience:** Ask whether upcoming enhancements reduce the operational burden on IT teams, not just add features. Look for concrete moves like simplified permission models, low-code configuration tools, delegated administration for business units, or AI-assisted setup and troubleshooting. A vendor investing here is signaling that they understand the total cost of ownership is often driven by administrative overhead.
- **For industry- or domain-specific improvements:** Assess whether the vendor is building purpose-built capabilities for its sector, such as regulatory content models for financial services, chain-of-custody features for life sciences, or case management templates for public sector. Vendors with credible domain road maps typically point to named customer advisory boards, vertical solution teams, or partnerships that validate the direction.
- **For analytics and reporting:** The key question is whether the vendor is moving from static usage dashboards toward embedded, actionable intelligence, things like content life-cycle analytics, compliance risk scoring, redundant or obsolete content identification, and natural language query over metadata. Buyers should weigh whether these capabilities will be native to the platform or dependent on third-party BI tool integration since that affects cost and complexity.
- **For personalization:** Personalization enhancements are worth probing from both an end-user and administrator angle. On the end-user side, look for adaptive interfaces, role-based content recommendations, and AI-driven search relevance tuned to individual behavior. Buyers should also ask how personalization intersects with governance, since overly permissive personalization can create shadow processes that undermine records management.
- **For architectural improvements:** Buyers should ask about progress on microservices decomposition, API-first design, multicloud or hybrid deployment flexibility, and composability with a broader content services stack. A vendor still running on a monolithic legacy core should be pressed on modernization timelines, since this affects both scalability and the pace of future innovation.
- **For large file size handling:** This is an important, practical concern as content includes more rich media, high-resolution imagery, and CAD files. Buyers should ask about planned improvements to chunked or streaming uploads, storage tiering, rendering and preview performance for oversized files, and any hard limits on file or repository size that could force insecure workarounds down the line.
- **For security and regulatory improvements:** Evaluate claims against the buyer's actual compliance obligations rather than generic assurances. Ask vendors to name specific certifications in progress, upcoming encryption or key management enhancements, support for emerging data residency and sovereignty requirements, and how AI features are being governed to prevent unintended data exposure. This

is one area where buyers should treat committed dates with real weight since misses can create direct compliance exposure.

- **For integration and connector improvements:** Buyers should ask about planned connectors to collaboration suites, ERP and CRM systems, low-code platforms, and AI or agentic tooling, as well as whether the vendor is investing in a modern API layer and MCP versus maintaining a long tail of brittle point integrations. The strength of a vendor's integration road map often predicts how well it will fit into the buyer's evolving technology ecosystem over the life of the contract.

Migration is a modernization opportunity, not just relocating content

Migration is often driven by the rising cost of ownership, integration limitations, or vendor end of life. But the strongest case for migration is modernization, pivoting from that initial driver to what the new platform can actually do — unlocking capabilities the legacy system can't deliver, not just relocating. The questions that follow help buyers protect content integrity and manage risk when considering migration. Throughout the migration:

- Are prior versions, revision history, and audit trails migrated from legacy systems?
- How are existing folder/document-level permissions translated into the new platform's permission model? Who validates that a user's access post-migration matches their access premigration?
- What is the vendor's track record migrating repositories of comparable size (document count, total storage, number of custom content types)? Can migration run incrementally with the legacy system still live, or does it require a cutover window?
- What tools or reports does the vendor provide to verify a 1:1 count of migrated content, catch failed transfers, or flag corrupted/incomplete files? Is there a reconciliation step before the legacy system is decommissioned?
- What happens to existing workflow automations, approval chains, and third-party integrations built on the legacy platform? Does the vendor migrate these or only the underlying content?
- Does migration include an opportunity to redesign existing manual approval/routing workflows to take advantage of automation or agentic capabilities rather than just recreating the old workflow in the new system?
- How is metadata (custom fields, tags, retention labels, version history) mapped and preserved during migration? Does the vendor offer auto-classification or entity extraction during migration, so unstructured legacy content gets AI-usable metadata rather than just moving over as is?
- Can migration be used to unify multiple legacy naming conventions and folder structures into a single, AI-friendly schema, or does the vendor just replicate each source system's existing taxonomy separately?

- Does the process include identifying redundant, obsolete, or trivial (ROT) content, so AI search and automation aren't operating over years of clutter?
- Will the vendor assess which content is actually AI ready (well-tagged, high quality, structured) versus which needs remediation before AI features will perform well against it?
- Is content indexed for semantic or vector-based search as part of migration, or is that a separate project after the fact?

Assess AI maturity and agentic capabilities

The emergence of agentic AI as a core capability in content platforms warrants specific evaluation attention. The questions that follow will help buyers separate genuine agentic capability from marketing language:

- Which content workflow tasks can be executed autonomously today, without human intervention, in a production customer environment? Request specific examples and customer references who can speak to agentic automation in practice.
- How are AI agents governed? How are permissions secured and synced? What controls exist to prevent incorrect autonomous actions or prompt injections? What audit trail is available for AI-executed transactions? How are exceptions surfaced and escalated to human reviewers?
- Can the organization build and deploy custom AI agents for its own specific content-centric processes? Vendors that offer no-code agent builders provide flexibility that is particularly valuable for organizations with complex workflows.
- How does the platform handle AI hallucinations or errors? What safeguards exist to prevent incorrect permissions, data extraction, memory/context drift, erroneous recommendations, or improper approval routing from propagating through the workflow?

VENDOR SUMMARY PROFILES

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

Iron Mountain

After a thorough evaluation of Iron Mountain's strategies and capabilities, IDC has positioned the company in the Major Players category in this 2026 IDC MarketScape for intelligent content services.

Iron Mountain is a public company founded in 1951 and headquartered in Portsmouth, New Hampshire.

Quick facts about Iron Mountain are as follows:

- **Approximate number of global employees (as of 1H26):** 96,000
- **Market coverage:** North America, South America, EMEA, and APAC (minus China)
- **Industry focus:** Financial services, insurance, healthcare, energy and utilities, media and entertainment, and professional services
- **Company size focus:** Midsize and enterprise
- **Product evaluated:** Iron Mountain InSight DXP
- **Common integrated applications:** AWS S3, Workday, Microsoft SharePoint, and Google Gmail
- **Deployment options:** Public cloud SaaS
- **Modernization/migration strategy:** Iron Mountain's InSight DXP supports the four core migration patterns, mapping its modular ingestion pipelines to the enterprise's legacy systems, current deployments, and compliance objectives. Migration runs as a stateful ETL process orchestrated by cloud-native tools, letting tasks be safely paused, scheduled, or resumed to prevent data loss. A native, low-code data lift tool built into the core InSight DXP interface enables self-service migration, shifting ownership from specialized IT teams to business administrators.
- **Interesting fact about Iron Mountain:** While many associate Iron Mountain with physical storage, Iron Mountain helps its customers transform and activate their history. The McLaren Mastercard Formula 1 team leveraged Iron Mountain's legacy digital platforms to digitize and unlock over 60 years of heritage racing data (including film, magnetic tape, and delicate engineering drawings and blueprints) and are now migrating to InSight DXP to scale their real-time data orchestration and fan engagement for the AI era.

Strengths

- **AI strategy:** As a newer market entrant, InSight DXP was built from the ground up as an AI-first cloud SaaS platform (available across AWS, Google Cloud, and Microsoft Azure marketplaces). AI is native to its content and collaboration services, document extraction, and intelligent automation rather than bolted on through fragmented add-ons. Insight Assist, the platform's embedded AI assistant, appears as a persistent, context-aware panel with access to document libraries, case files, and search screens — letting business users run natural language queries and trigger automated workflows without leaving their active workspace. To improve outcomes, InSight DXP uses a structured Knowledge Ops framework with deterministic, multimodal, and human-in-the-loop validation.

- **Asset and content migration:** Iron Mountain can accelerate modernization by unifying digital and physical records under a single system of record, closing the compliance gaps that disconnected systems create. InSight DXP manages multisystem dependencies during transition through prebuilt integration layers and targeted data discovery modules. Migration includes semantic enrichment at the point of ingestion, with native JSON schema support and automated OCR pipelines that convert unstructured legacy archives into structured, AI-ready assets as part of the migration itself rather than as a separate cleanup phase.
- **Governance:** InSight DXP offers end-to-end life-cycle governance and activation of information assets, including physical records. The platform converts static corporate repositories into governed, active intelligence by managing the full information life cycle: capture, physical-to-digital twin lineage tracking, automated workflows, multi-jurisdictional retention, and AI-driven insight generation. It is built on Iron Mountain's compliance track record and holds SOC 2 Type II, ISO 27001/27017/27018, German BSI C5, French NF461, and FedRAMP High certification with HITRUST in progress — reducing regulatory exposure across jurisdictions.

Challenges

- **Platform maturity:** Content services buyers weigh vendor maturity heavily, and a shorter track record means fewer large-scale enterprise deployments, native integration and partner ecosystems, and less proven compliance depth across jurisdictional and industry-specific requirements, as well as edge cases. Iron Mountain does provide over 300 integrations through MuleSoft iPaaS.
- **Digitization as a pipeline:** The core tension is that a digitization engagement and a content services platform decision can be fundamentally different sales motions, bought by different people for different reasons. Iron Mountain's digitization relationship typically sits within operations, records, and facilities management, and expanding it requires reaching an entirely different set of stakeholders — IT and the C-suite driving digital transformation. Iron Mountain does have direct hyperscaler marketplace presence, allowing for funding via existing, pre-committed cloud budgets.

Consider Iron Mountain when

Organizations should consider Iron Mountain for its strength in content governance, records management, digitization, and intelligent document processing. It unifies physical and digital information life cycles into a single application, activating both as usable assets rather than static records. InSight DXP, its agile, low-code content platform, runs on a standardized repository with a centralized security model, allowing domain-specific industry applications to deploy quickly. On the agentic AI side, InSight DXP combines a centralized Agent Builder Studio with native execution nodes inside its workflow engine, leveraging MCP and A2A

protocols to orchestrate autonomous multiagent swarms directly within enterprise document pipelines.

APPENDIX

Reading an IDC MarketScape graph

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

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

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

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

IDC MarketScape methodology

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

Market definition

For this research, IDC defines this market as content applications that enable organizations to capture, build, organize, manage, transform, share, publish, and store an enterprise's unstructured data, content, documents, and records. It is the combined landscape of traditional enterprise content management (ECM) applications and content sharing/collaboration applications.

Content services applications also provide a foundation for knowledge management, compliance, and (combined with business process management and analytics) a platform for delivering applications that automate document-centric business processes.

While this IDC MarketScape will still consider the essentials of content management, the emphasis will be on support for content in motion, through modularity, interoperability, automation, and AI/ML. In other words, intelligent content services transform content and unstructured data from static assets into a dynamic, valuable resource that can be leveraged for a wide range of business needs.

LEARN MORE

Related research

- *Market Share: Worldwide Content Services Applications Shares, 2025 — Content Is an Agentic Asset* (IDC #US53729026, August 2026)
- *IDC Survey: Content Maturity and AI Readiness* (IDC #US54158526, May 2026)
- *IDC Survey Spotlight: How Is GenAI Driving Content Workflow Automation?* (IDC #US54420526, March 2026)
- *IDC TechBrief: Retrieval-Augmented Generation for Knowledge Discovery* (IDC #US54159026, March 2026)

Synopsis

This IDC study examines how content services vendors are adapting as content shifts from a passive system of record to the context layer that AI — and, increasingly, AI agents — depend on to reason, retrieve, and act. IDC evaluates vendors on their ability to make enterprise content AI ready at scale. This includes enrichment and semantic retrieval, native agent access through emerging standards like MCP, governance built directly into the platform to manage AI's expanded risk surface, and content modernization built into the migration process itself.

"Content earns the label 'intelligent' when it stops being merely stored and retrieved and becomes the context layer that AI and automation depend on to reason, retrieve, and act reliably," says Amy Machado, research director, Content and Knowledge Discovery Strategies, IDC.

ABOUT IDC

International Data Corporation (IDC) is the premier global market intelligence, data, and events provider for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries. IDC's analysis and insight help IT professionals, business executives, and the investment community make fact-based technology decisions and achieve their key business objectives.

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