Magic Quadrant for Intelligent Document Processing

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The intelligent document processing market is expansive, with over 100 vendors, including from adjacent markets, offering full solutions or individual components. Enterprise application leaders should use this research to understand the products offered by the market's most prominent vendors.

Market Definition/Description

Gartner defines intelligent document processing (IDP) as platforms that utilize multiple AI techniques to capture and enrich data, enabling the automated processing of complex documents (from multiple formats and layouts) and supporting workflows across applications.

Organizations receive and process large volumes of documents in multiple formats to enable business processes such as onboarding new customers and processing claims. Extracting data from content is essential for document processing and the workflows these activities support. IDP platforms fulfill this role by augmenting and, in some cases, replacing people to enable more efficient automated business processes and improve decision intelligence.

By extracting data from documents, IDP solutions augment or replace human work through automation. Beyond optical character recognition (OCR), IDP uses composite AI — multiple AI techniques, such as machine learning, large language models (LLMs) and knowledge graphs — to automatically extract data despite novel variations in document type and format. This capability supports many more document types across a diverse range of use cases, from transactional invoice processing in accounts payable to augmented reading of specialized DOCX (Word) manuals to support decision making.

IDP platforms support the following principal use cases:

- **Transactional document processing workflows:** Processing single, independent documents, such as invoices and purchase orders.
- **Interdependent document processing workflows:** Processing multiple related documents for compliant processing and reference, such as identification checks for know your customer (KYC).
- **Contextual intelligence workflows:** Using semantically enriched data to activate knowledge and deliver insights for agents and assistants, such as technical manuals.
- **Specialized document processing workflows:** Processing documents formatted for technical specializations, such as engineering drawings, telecommunications drawings and architectural plans.

Not all IDP vendors can process every type of document and its content, and IDP has not yet become commoditized. As a result, organizations evaluating IDP vendors should assess compatibility with their specific document types and data schemas. This assessment includes evaluating the product or service offerings and the supporting services required to achieve optimal processing performance.

Mandatory Features

- **Extraction:** Capture, validate and map entities from content to structured data.
- **ModelOps:** Govern and manage the life cycle of composite AI and decision models.
- **Composable architecture:** Platforms that provide flexibility in composition and deployment.
- **Preprocessing:** Integrate with upstream applications to ingest and prepare content.
- **Postprocessing:** Validate and integrate data with downstream applications.
- **Human in the loop:** Enable subject matter experts to handle exceptions and support workflow automation.

- **Workflow orchestration:** Automate document-processing workflows using agentic or deterministic methods.

Optional Features

- **Agentic orchestration**: Use agents to orchestrate and complete tasks in support of workflow automation.
- **Centralized repository:** Store extracted data to support postprocessing and downstream use.
- **Collaboration:** Enable human-in-the-loop collaboration among SMEs for authorization and exception handling.
- **Data validation:** Perform external data cross-checks during extraction to validate data.
- **Flexible deployment:** Define solution options for platform hosting and management.
- **MLOps:** Govern and manage ML models used in document processing.
- **No/Low code:** Support SME-led development and maintenance of workflows.
- **Other language models:** Support small, domain-specific and multimodal language models.
- **Prebuilt downstream integrations:** Provide ready-to-use integration with common downstream applications to support data export.
- **Prebuilt upstream integrations:** Provide ready-to-use integration with common upstream applications to support content ingestion.
- **Rich media capture:** Capture image, audio and video data to enable extraction from nontextual content.
- **Third-party components:** Enable the selection and use of third-party components.
- **Workflow governance and management:** Ensure compliance with policies and maintain control across all workflows.

Magic Quadrant

Figure 1: Magic Quadrant for Intelligent Document Processing Solutions

Magic Quadrant for Intelligent Document Processing

Gartner

Vendor Strengths and Cautions

ABBYY

ABBYY is a Leader in this Magic Quadrant. Its Document AI products broadly focus on intelligent document understanding and processing.

ABBYY's operations are geographically diversified in North America, EMEA and Asia/Pacific. Its clients tend to be enterprises in banking, healthcare and insurance, where its models for common document processes such as know your customer (KYC), insurance claims, and explanation of benefits drive needs for straight-through processing.

The vendor's strategic focus includes unifying its platform, operationalizing hybrid GenAI, and expanding its technology ecosystem to give users governed automation. Its most recent innovation is a hybrid AI approach that integrates LLMs and, when paired with DocLang format, adds another layer of structure and governance.

Strengths

- **Document skills:** Compared to many of its competitors, ABBYY offers more ready-to-use document tools and prebuilt solutions that can be found in its marketplace; these support out-of-the-box extraction for various templates. This enables enterprises to automate standard document workflows quickly, reducing the need for manual model training and speeding up initial deployments.

- **Functional parity across deployment options**: ABBYY maintains complete feature and accuracy parity across SaaS, private cloud, containerized and on-premises environments. This identical capability across all deployment approaches allows regulated organizations to run fully air-gapped deployments locally without sacrificing any document processing functionality.

- **Global deployment partner network**: ABBYY maintains one of the largest partner networks and reference customer footprints across North America, EMEA and Asia/Pacific. For end users, this widespread ecosystem ensures access to localized deployment support and prebuilt system integrations globally.

Cautions

- **Fragmented product portfolio**: ABBYY's capabilities remain distributed across separate product lines (Vantage, FlexiCapture and FineReader Engine). Its unified platform is still in development. Enterprises must juggle multiple environments or plan for migrations to consolidate workflows, which adds integration complexity and delays access to new, cross-product features.

- **Limited multimodal content support**: ABBYY's ingestion pipeline remains limited to document text and static image files. Extending extraction capabilities to support nondocument formats like chat, audio and video remains an unreleased roadmap item slated for future development.

- **Lack of runtime routing**: ABBYY's roadmap does not plan to move from fixed routing pipelines to automated, real-time model selection before 2027. As a result, users will not be able to automatically route documents to the most cost-effective or fastest models at runtime until after that time.

Appian

Appian is a Visionary in this Magic Quadrant. Its AI Document Center (DocCenter) product is a part of the Appian Platform, a unified system for process orchestration, automation and intelligence, built on core low-code app capabilities.

Appian's operations are mostly focused in North America, and its clients are large enterprises in government, banking and insurance. The product offers prebuilt solutions for these industries to accelerate end-user deployment.

The vendor's strategic priorities include democratizing intelligent document processing (IDP) model creation, deepening data fabric integration, and expanding AI agent capabilities for document-heavy workflows, with sophisticated document understanding, reasoning, and decision making for complex, multistep tasks. Its most recent innovation is the Agent Design Object, which enables flexible, goal-oriented agentic workflows that can choose the next best action dynamically.

Strengths

- **Compliance:** Appian is preauthorized for highly secure operations across regulated industries. It holds some of the most demanding compliance credentials in the market, including FedRAMP Moderate, DoD Impact Levels 2, 4 and 5 for defense, GxP, FDA 21 CFR Part 11, HIPAA (BAA available) and PCI DSS.

- **End-user experience:** DocCenter democratizes document extraction by providing a visual, model-driven experience. Business users define extraction fields and rules using plain, natural-language descriptions, allowing for low-risk integration.

- **Partner ecosystem:** Appian leverages a global network of certified partners and prebuilt accelerators to simplify application integration with existing back-end systems. This minimizes custom development, accelerates deployment and seamlessly embeds IDP into broader enterprise architectures.

Cautions

- **Market position:** Appian positions its IDP capabilities to optimize end-to-end processes, rather than to compete directly with specialized IDP vendors. While some Appian customers use DocCenter as stand-alone IDP, its capabilities are designed around supporting Appian-native applications, so it may not suit enterprises looking for a stand-alone, decoupled IDP solution.

- **Cloud-dependent GenAI:** Appian's generative document extraction relies on hybrid cloud connectivity to its AI services (for example, Amazon Bedrock). It also doesn't currently support fully offline, air-gapped LLM processing on-premises. This may limit the platform's applicability to strict defense, intelligence or high-security public-sector environments that require completely isolated document processing.

- **Strict ingestion size and length constraints:** Appian's document processing pipeline enforces a strict 100 MB per-file size limit and a 1,000-page limit. As a result, businesses attempting to process high-resolution scans, or lengthy reports or financial disclosures, will face automated ingestion failures and must rely on IT teams to build custom page-splitting, compression and merge logic.

Automation Anywhere

Automation Anywhere is a Challenger in this Magic Quadrant. Its Document Automation product broadly focuses on document processing and automation.

Automation Anywhere's operations are geographically diversified in North America and EMEA, with clients in banking, manufacturing and healthcare.

The vendor's top strategic priorities center on catering to industry-specific high-volume complex document processing needs, building vertical solutions and deepening hyperscaler co-selling. Its recent innovations include capabilities for document evaluation, which let customers test, benchmark and validate document extraction accuracy. Specific features include Test Mode, which allows developers to define, test compare and select the best-performing prompts or queries for extraction, and Adaptive Search Queries (ASQs).

Strengths

- **Vertical strategy:** Automation Anywhere offers prebuilt, domain-specific IDP solutions tailored to highly regulated sectors like healthcare, financial services and manufacturing. These packages come with premapped data schemas and integrations designed to accelerate time to value for complex use cases.

- **Innovation**: Automation Anywhere has a significant R&D investment, a broad U.S. patent portfolio, and ISO/IEC 42001 AI-management certification. The platform offers grounded

GenAI extraction, agentic workflows, document evaluation, multiengine extraction and composability features that deliver faster time to value.

- Sales strategy: Automation Anywhere offers an enterprise-grade channel and services ecosystem with 180+ Verified Services Partners and 3,000+ global system integrators. Its outcome-focused presales and hyperscaler co-selling approach, featuring business value proposals, structured PoCs and deep cloud partnerships, reduces procurement friction.

Cautions

- Implementation timeline: Despite offering prebuilt templates, some feedback cites longer-than-expected implementation cycles and integration challenges. Organizations may need to invest time in upfront alignment and workflow integration before realizing the platform's full operational value.

- Pricing model: The vendor is shifting its pricing from separate per-page SKUs to a consumption-based Document Automation Credit system, but this entitlement is currently only available for cloud deployments. Customers could face commercial challenges when migrating to this new consumption-based model.

- Market positioning: Automation Anywhere builds its marketing strategy around its agentic automation offering and promotes IDP as a module integrated into the broader platform for process automation. This can create a barrier for clients focused solely on stand-alone IDP capabilities.

Coupa (Rossum)

Rossum, acquired by Coupa in May 2026, is a Niche Player in this Magic Quadrant. Its Rossum cloud product is broadly focused on transactional document automation.

Operations are mostly focused in EMEA and its clients are midsize and large enterprises in manufacturing, transportation and retail. Its prebuilt/configured models for supply chain documents accelerate user straight-through processing.

The vendor's strategy is geared toward hyperscaled distribution via Coupa, transitioning to autonomous agents, and aligning with GSIs, which drives faster user ROI. Its recent innovation is the Automation Assistant. It enables adjusting platform configuration, such as optimal settings for automation/precision trade-off, via conversation.

Strengths

- **Product features:** Rossum's core data capture is driven by Aurora, its document-specific transactional LLM (T-LLM), which is designed to outperform general-purpose LLMs on transaction-heavy documents like complex multiline purchase orders. For end users, this model delivers high OOTB extraction accuracy on variable layouts, reducing hallucinations and potentially bypassing the high latency and token costs of general-purpose models.

- **Coupa ecosystem synergy:** Following its acquisition by Coupa, Rossum plans to leverage Coupa's global footprint to offer integrated document processing for Coupa's existing customers for invoice-to-pay (I2P), source-to-contract (S2C), and supply chain management (SCM) environments. Existing Coupa clients could potentially realize a decline in manual data entry tasks, tighter compliance controls and clearer transaction visibility across their I2P, S2C and SCM workflows.

- **Out-of-the-box European compliance:** For customers in Europe, Rossum supports international formats (like Pan-European Public Procurement Online (Peppol)) and country-specific formats, like Germany's ZUGFeRD and XRechnung, to meet regional tax and invoicing regulations. Customers based out of Europe can potentially benefit from fewer manual invoice adjustments and shorter processing times for compliance checks.

Cautions

- **Unsupported nondocument rich media modalities:** Rossum's extraction engine focuses only on traditional document formats. The platform does not natively support the ingestion, processing or extraction of information from stand-alone audio or video media channels, requiring organizations seeking multimodal extraction to integrate external transcription or rich-media processing tools.

- **Limited deployment modes:** Rossum operates strictly as a cloud-native SaaS platform on public or private cloud environments, with no support for traditional on-premises installations. For highly regulated enterprises, such as sovereign public-sector bodies and defense agencies, whose compliance frameworks strictly prohibit external or web-hosted data transmission, this could create challenges.

- **Acquisition**: Following its acquisition by Coupa, customers should validate roadmap commitments, feature priorities, SLAs and compliance provisions, and reassess TCO and support structures to avoid unforeseen disruptions or deprioritized capabilities.

EdgeVerve

EdgeVerve is a Niche Player in this Magic Quadrant. Its Infosys Topaz AI Next product broadly focuses on orchestrating data, AI models and processes at scale.

EdgeVerve's operations mostly focus on North America, Asia/Pacific and Europe, and its clients are large enterprises in banking, manufacturing and healthcare. The organization accelerates end-user decisions by offering advanced document processing across a wide range of industries and prebuilt document workflows for KYC, supply chain and claims processing.

EdgeVerve's top strategic investments planned for the next 12 months include introducing agent templates and launching agent-enabled apps to reduce end-user IT dependency. Its most recent innovation is the release of its 200+ prebuilt Doc Agents for automated processing and a low-code UI for multiagent orchestration.

Strengths

- **Product strategy:** EdgeVerve's product strategy supports contextual, multimodal and decision-centric document automation, enabling organizations to address complex business processes, including long-context documents, cross-document understanding, domain-specific contextualization and real-time decisioning use cases. The platform's multimodel AI management, human-AI-agent orchestration, cost optimization techniques and strong governance framework position it to support scalable, production-grade enterprise AI deployments.

- **Market responsiveness:** EdgeVerve's multimodel strategy, deployment flexibility and cost optimization features address evolving customer requirements for control, scalability and data sovereignty. Continued investments in contextual intelligence and cross-document reasoning align with emerging demand for complex AI-enabled business workflows.

- **Innovation:** EdgeVerve's portfolio of 200+ prebuilt AI agents and templates enables rapid deployment across business and operational use cases. This is likely to benefit scaling, while also enabling customers to accomplish complex process automation with minimal technical expertise.

Cautions

- **Operations:** EdgeVerve's limited number of operational, organizational or compliance certifications and standards for its IDP solution (including third-party attestations) is a competitive challenge. Clients must ensure the platform meets necessary requirements during the discovery phase.

- **Sales strategy:** EdgeVerve's partner ecosystem closely aligns with the broader Infosys organization, which may offer fewer independent implementation and advisory options than vendors with more extensive third-party partner networks.

- **Marketing approach:** EdgeVerve's executive-focused, services-led marketing approach may limit engagement with operational stakeholders responsible for day-to-day process ownership. This could increase change management efforts and slow user adoption if business users don't perceive clear alignment between platform capabilities and operational outcomes.

Hyland

Hyland is a Visionary in this Magic Quadrant. Its Hyland IDP product is a part of its Content Innovation Cloud, broadly focused on intelligent capture and automation of content-centric processes.

Hyland's operations are mostly focused in North America. Its clients are enterprises in healthcare, banking and government, where its models accelerate workflows for clinical records, KYC and processing of permits.

The vendor's top three most impactful strategic changes planned for the next 12 months are launching outcome-based pricing, opening an AI Agent Marketplace, and accelerating vertical SaaS offerings to yield faster user ROI. Its most recent innovation is the zero-shot document intelligence platform, which structures content for retrieval-augmented generation (RAG) and supports contextual validation and downstream AI agents.

Strengths

- **Offering (product) strategy:** Hyland's IDP offering is one part of a broader suite of applications that specialize in managing and automating content, including its Content Innovation Cloud document management solution. Its IDP represents just one product in a broader portfolio that Hyland can provide.

- **Geographic strategy:** Although mostly focused on North America, Hyland is one of the few vendors in this market with customers, staff and partners of all types (ISVs/technology providers, OEMs, resellers, system integrators, delivery partners, and business process outsourcers) in all geographic regions. Clients in any region can likely find Hyland's other customers and representation there, as well as access to regional delivery resources and support.

- **Sales strategy:** Planned changes to Hyland's pricing model include a shift to outcome-based pricing in support of straight-through processing, and the option of sustainable AI via a separate pricing tier. Outcome-based pricing pays for success rather than failure, albeit at a premium, so clients should consider this option — if available from vendors — with respect to workflows with higher exception rates.

Cautions

- **Long sales execution:** The duration of sales cycles and subsequent implementation (configuration and deployment) for Hyland are among the longest in this market, given that Hyland IDP is most often deployed as part of Hyland's broader set of vertical industry solutions. Both existing and prospective clients should set expectations among their stakeholders and identify ways to prioritize critical path activities.

- **Customer experience:** Hyland's articulation of customer challenges aligns to customers who have low to medium maturity in document processing (i.e., manual processing or template-based optical character recognition [OCR]). Customers with higher levels of maturity should ensure that Hyland has responses to the sorts of challenges they may be seeking to address (e.g., packaging of governance, observability and agent-to-agent orchestration).

- **Innovation:** While R&D spend is competitive, Hyland's latest developments position its product as comparable, rather than ahead, in terms of innovation. A key innovation for this market — multiagent capabilities — is on its roadmap, while a number of competitors already offer this. Hyland's capability to leverage context has the potential to enhance its position with respect to multiagent workflows. Buyers are encouraged to seek a review of Hyland's roadmap to ensure it aligns with their aspirations.

Hypatos

Hypatos is a Visionary in this Magic Quadrant. The Hypatos platform broadly focuses on operating AI agents for document-heavy processes and workflow integrations.

Hypatos' operations are mostly focused in EMEA, and its clients are large enterprises in retail, manufacturing, and transportation. The product features out-of-the-box (OOTB) agents and is contextualized to specific-industry workflows like order confirmation, cost center coding and more.

The vendor’s top strategic priorities include expanding U.S. operations, scaling partner-led growth and expanding OOTB agents for procure-to-pay and order-to-cash processes. Its most recent innovation is the feedback agent, which lets nontechnical users improve agent behavior via natural language.

Strengths

- Market understanding: Hypatos’ global business services (GBS) manifest as a broad portfolio of prebuilt OOTB agents and enterprise-grade connectors. This alignment to the needs of shared services delivers faster time to value for customers because many core workflows, validations and integrations are production-tested and encoded in the platform.

- Foundation for knowledge management: Hypatos is investing in building knowledge and context management foundations for agentic workflows. Its Feedback Agent captures expert knowledge and embeds it into agentic workflows, improving the platform’s ability to handle complex exceptions at scale that free up SME bandwidth for other tasks.

- Marketing execution: Its messaging emphasizes measurable business outcomes, including skill-based pricing, faster time to value, reduced operational effort and scalable automation of complex, knowledge-intensive tasks, aligning well with the priorities of business and transformation leaders.

Cautions

- Solution scaling: The high degree of configurability of Hypatos’ AI agents can make large-scale deployments more complex to govern and maintain. As customers expand across business units, processes and geographies, effective scaling requires strong standardization, governance and a clear operating model.

- Document workflow: Customers operating in legacy environments may experience integration and operational limitations, often requiring greater customization and workarounds as Hypatos increasingly focuses on AI-first document workflow automation.

- Geographic strategy: Hypatos primarily serves customers in EMEA, which represents nearly two-thirds of its installed base, followed by the U.S. Buyers in other regions should validate the strength of the local partner ecosystem and the availability of delivery, support and maintenance resources before deployment.

Hyperscience

Hyperscience is a Leader in this Magic Quadrant. Its Hyperscience Hypercell product focuses on automating complex document use cases across multiple vertical markets by using configurable components, including Blocks, Flows and Blueprints.

Hyperscience's operations are concentrated in North America. Its primary clients are large enterprises in banking, government and insurance. Hyperscience offers specialized models for classification and extraction, sensitive data handling, and governed and auditable outcomes.

The vendor's key strategic priorities are embedding orchestration pipelines natively within hyperscaler architectures. Hypercell orchestrates specialized agents for classification, extraction and validation. Extraction and reasoning agents select the right technique for the task, including use of proprietary machine learning (ML), large language models (LLMs), deterministic rules, or human in the loop (HITL). Its latest innovation, inference layering optimization, dynamically routes tasks to the most suitable models to balance accuracy and latency, while reducing costs by reserving LLMs for edge cases.

Strengths

- **Scaling document workflow automation**: Hyperscience's use-case evolution signals a strategic transition from a tactical extraction tool to a platform that orchestrates complex document-centric processes, transforming unstructured data into structured, governed datasets that underpin enterprise GenAI initiatives. Customers looking for end-to-end document workflow automation, at scale, will benefit from this approach.

- **Market understanding:** Hyperscience's capability set aligns well with common priorities found in enterprise GenAI deployments; for example, cost, performance and governance considerations. Hyperscience's blueprint-driven delivery approach reduces implementation complexity and composability overhead, while sovereign deployment options and zero-connectivity model execution support highly regulated industries' requirements.

- **Focused GTM and partner strategy**: The vendor allocates significant marketing spend to Tier 1 events, analyst relations and co-sell motions with hyperscalers and global system integrators (GSIs). Customers benefit from stronger credibility, deeper integration options, and easier access into large transformation programs through those partner channels.

Cautions

- **Geographic strategy**: Hyperscience's operations remain largely centered in the U.S., followed by Europe. This limited footprint in other regions may force clients to depend on remote resources or partners for implementation, support and maintenance activities.

- **Operations:** Hyperscience has fewer resources dedicated to professional services and runtime operations than some market peers. Organizations planning large-scale or business-critical deployments should evaluate whether the vendor's partner ecosystem can support implementation, customization and ongoing operations.

- **Quality assurance:** Hyperscience's emphasis on HITL and manual QA processes may appear less streamlined than AI-native approaches, particularly for end users expecting greater automation in GenAI-enabled workflows. The increasingly layered AI-in-the-loop review, using multiple independent models, helps reduce items requiring manual review to an extent.

Infrrd

Infrrd is a Leader in this Magic Quadrant. Its Titan IDP enables extraction of data from structured and unstructured documents.

Infrrd's operations are mostly focused in North America. Its clients are in banking, insurance and manufacturing. Contextualized with mortgage QC templates, ACORD schemas, and CAD extractions, it speeds no-touch processing.

The vendor's strategic priorities focus on introducing agent-layer pricing, M&A growth and partner-led distribution to accelerate access. Its most recent innovation is agentic AI orchestration, which enables autonomous document processing, proactive workflow management and stronger exception handling, as well as cross-document fraud detection that flags forged documents at the source to prevent lending losses.

Strengths

- **Model orchestration:** Infrrd's routing layer directs extraction tasks to either frontier models or domain-specific small-language models, based on criteria like complexity, cost, latency and data residency requirements. This optimizes performance, costs and governance across diverse workloads.

- **Human-in-the-loop exception routing**: Infrrd's platform includes an exception-management framework that employs SLA-aware, skills-based and affinity-driven routing to prioritize urgent files, match document types to reviewer expertise, and leverage historical speed and accuracy metrics. This ensures that low-confidence documents receive timely human review.

- **Innovation**: Infrrd's investment in research and development is backed by a robust portfolio of patents in areas like image-based text recognition, data extraction and layout understanding. This drives ongoing enhancements and offers innovative document processing capabilities.

Cautions

- **No native video/audio processing**: The platform's ingestion pipeline only supports text and static images; multimodal video and audio files must be preprocessed or transcribed externally before submission. Organizations handling recorded calls, customer service recordings or video submissions face added toolchain complexity and manual workflow steps that slow down processing and increase operational overhead.

- **No integrated conversational interface:** Slack and Microsoft Teams connectors aren't yet available, so users must perform status checks, file uploads and exception reviews via the stand-alone web portal. Business users and document reviewers incur system-switching delays, reducing productivity and increasing the time required to monitor and manage extraction workflows.

- **SMBs limited to channel-partner access:** Infrrd's direct sales, trials and support focus on midsize-to-large enterprises, requiring small businesses to engage certified partners for licensing and implementation. Smaller organizations cannot self-service or access trial environments directly, leading to longer evaluation cycles, less responsive support and potential barriers to rapid adoption.

Iron Mountain

Iron Mountain is a Challenger in this Magic Quadrant. Its Iron Mountain InSight DXP product broadly focuses on deriving intelligence from digital and physical content into document intelligence.

Iron Mountain's IDP operations are prominent in North America, with a good spread across other geographies, and its clients are enterprises in government, banking and insurance. Iron Mountain offers models that deliver audit-ready data across digital and physical content, such as records, loans and claims.

The vendor's top three most impactful strategic changes planned for the next 12 months are launching an Agent Marketplace, expanding cloud marketplace distribution and scaling outcome-based pricing to speed user ROI. Its recent innovations focus on enabling multimodal content intelligence by extending its IDP to process video, audio and imagery, and introducing an agentic automation platform.

Strengths

- **Innovation:** Iron Mountain provides differentiated multimodal asset processing. Unlike many competing platforms, the InSight DXP platform extends beyond text and 2D documents to process unstructured rich-media content, using multimodal embeddings. This enables users to find related and similar documents and media across formats.

- **Robust compliance:** Iron Mountain focuses on security-by-design and compliance by offering top-tier security credentials, including FedRAMP High Authorization, zero-trust network execution, and automated character-level PII/PHI redaction at intake.

- **Vertical strategy:** Unlike its competitors' horizontal-only IDPs, Iron Mountain maintains a defensible, vertical-specific go-to-market and product architecture across multiple industries and domains, focusing on deployments where document complexity, strict regulatory compliance, and a high cost of failure create a critical need for production-grade automation.

Cautions

- **Legacy brand perception constraints:** Despite substantial marketing investments in InSight DXP, the provider continues to navigate market awareness around its evolution from physical storage to digital-native software. This perception gap often requires targeted buyer education. Prospects must carefully analyze their current and future document processing requirements and their alignment with the vendor's roadmap.

- **Dependency on custom integration for niche systems:** While InSight DXP features robust native connectivity with widely used horizontal enterprise applications, its OOTB integration matrix doesn't prioritize niche or highly specialized industry tools. As a result, organizations deploying the platform in highly specialized vertical environments may encounter extended implementation timelines and require custom API development to bridge gaps with legacy vertical architectures.

- **Customer experience:** Some Iron Mountain customers express concerns about billing and pricing, and customer support quality. Buyers should review proposals to take advantage of various allowances, be aware of constraints, and seek clarity on the invoicing structures and SLAs.

Laiye

Laiye is a Visionary in this Magic Quadrant. Its Agentic Document Processing (ADP) product broadly focuses on agent-powered document workflows and extraction.

Laiye's operations are mostly focused in Asia/Pacific, and its clients tend to be midsize to large businesses in manufacturing, banking, insurance and government. It provides out-of-the-box modules for claims to accelerate user deployment.

The vendor's upcoming strategic changes include expanding agent-native capabilities, accelerating its open ecosystem and deepening vertical templates, letting users build flows via chat. Its most recent innovation is conversation-driven document workflow orchestration, which allows users to build workflows via natural language.

Strengths

- **Product architecture:** Laiye has a native agentic architecture that uses LLMs and vision language models (VLMs) for zero-shot learning. This approach reduces the need for labeled training data or templates, allowing users to extract data from complex layouts using natural-language prompts.

- **Cost optimization:** Laiye incorporates cost reduction strategies like prompt caching, token-efficient processing, multimodal approaches and the use of smaller domain models to lower generative AI inference costs. Furthermore, its self-optimization agents autonomously learn from human corrections to refine extraction accuracy.

- **Document complexity:** Laiye's platform generalizes across multicolumn layouts, borderless tables, handwriting and Chinese seal stamps, which provides an advantage in processing global supply chain documents. It natively processes over 100 languages and provides support for handling mixed-language documents and complex regional formats.

Cautions

- **Usability and system setup:** Client feedback indicates that initial onboarding and workflow configuration of on-premises deployment demands more technical and IT involvement than anticipated. This reliance on dedicated technical resources can delay time to value.

- **Geographic strategy:** Laiye's market visibility and brand recognition remain limited outside of its core Asia/Pacific region. Buyers in other geographies should confirm the availability and level of support for their services within the specific region.

- **Product features:** While Laiye provides model behavior control for on-premises deployments, its SaaS platform does not currently allow users to customize or swap underlying LLMs, or bring their own models (BYOM). Furthermore, advanced capabilities, such as back-end multiagent collaboration and team-based, multilevel review workflows, are not yet natively supported and remain on the product roadmap.

Nanonets

Nanonets is a Visionary in this Magic Quadrant. Its Nanonets Agents platform broadly focuses on AI agents for accounts payable (AP), order management and revenue cycle management (RCM).

Nanonets' operations are concentrated in the U.S. Its clients span SMB, midmarket and large enterprises in finance, healthcare and logistics, where its prebuilt agents automate heavy workflows to cut manual entry.

The vendor offers vertical agent expansion, enterprise GTM maturation, and TCO-based differentiation against generic LLMs to provide users with reliable, hallucination-free document automation. Its recent innovations include Agent Builder for document workflows, Instant Learning Model and context graphs via Trail. These tools let users build agents via natural language and these agents learn the document workflow operations, including validations, rules and exception handling, in real time.

Strengths

- **Cloud-native product delivery:** Nanonets utilizes a continuous-delivery SaaS model with frequent, incremental feature rollouts that decrease maintenance overhead. This rapid deployment architecture minimizes downtime.

- **Verifiable document extraction:** The platform employs proprietary constrained language models that ensure each value extracted can be traced directly to its exact source location. This strict structural grounding provides provenance and decision explainability for audit and compliance.

- **Value-based economics:** Nanonets charges customers based on agent usage and business outcomes, rather than raw page consumption. This pricing model closely aligns ongoing software costs with the actual ROI that enterprise clients realize.

Cautions

- **Limited geographic and partner channel footprint:** The provider's active customer base is heavily concentrated within the North American and European markets, presenting a limited operational footprint across Asia/Pacific and Latin America. Prospective buyers should carefully verify regional product and support availability, as well as specialized local consulting resources.

- **Sluggish interface and custom integration barriers:** Some customers report occasional sluggishness within the UI and a steep technical learning curve that risks additional overhead requirements in terms of skills and time. Custom code workarounds may also introduce heavy reliance on IT.

- **Modality restrictions for nondocument assets:** Nanonets' document understanding engine cannot currently ingest or process rich-media modalities like audio or video. Organizations with multimodal requirements must deploy separate tools alongside Nanonets.

OpenText

OpenText is a Niche Player in this Magic Quadrant. Its OpenText Capture product, part of the OpenText Content Cloud portfolio, broadly focuses on extraction from structured and unstructured documents, as well as document workflow automation. It uses continuous ML and LLMs to transform paper and omnichannel digital content into actionable data for downstream business systems.

Its operations are geographically diversified, and its clients tend to be global organizations of all sizes across sectors like financial services, insurance, healthcare, manufacturing and government.

OpenText's recent investments and roadmap focus on expanding generative AI capabilities within OpenText Capture, most notably through OpenText Capture Aviator, an AI document understanding add-on that uses LLMs to extract data from complex, unstructured and low-quality documents. Furthermore, the provider is modernizing its product's administration with web-based user interfaces and leveraging LLMs to automatically generate information extraction profiles without utilizing customer data to train the models.

Strengths

- **Content ecosystem:** OpenText provides deep, OOTB integrations with major enterprise platforms. OpenText Capture provides the integrated ingestion engine for systems like SAP, Salesforce, Microsoft 365, and OpenText document management platforms, allowing actionable data to flow seamlessly into the line-of-business applications that employees already use.

- **Deployment flexibility:** Organizations can deploy OpenText Capture in a way that best fits their cloud journey, security and compliance needs. Options include on-premises, embedded microservices, multitenant SaaS, and private or hybrid clouds hosted by OpenText or major hyperscalers like AWS, Google Cloud and Microsoft Azure.

- **Preconfigured vertical solutions:** The platform includes prebuilt document definitions and extraction models for common scenarios like invoices, sales orders, purchase orders and delivery notes. It also provides horizontal capabilities that are customizable for specific verticals like financial services, manufacturing and the public sector.

Cautions

- **Agentic orchestration:** While OpenText introduced Content Aviator for agentic automation, its capabilities in areas like Model Context Protocol and agent-to-agent support weren't generally available during the evaluation window for this Magic Quadrant. Prospects must carefully evaluate their ambitions with agentic AI and see if those align with the vendor's roadmap.

- **Perception:** OpenText is deeply rooted as a document management and information management software provider. This creates a perception gap and requires buyer education for prospects looking for a stand-alone IDP platform.

- **Service delivery and documentation:** End users reported concerns with maintenance and support capabilities, including product documentation lacking in detailed information and sufficient examples.

OpenText did not respond to requests for supplemental information. Gartner's analysis is therefore based on other credible sources.

Tungsten Automation

Tungsten Automation (previously Kofax) is a Leader in this Magic Quadrant. Its Tungsten TotalAgility product broadly focuses on the full document-driven business life cycle.

Tungsten Automation's operations are global, with a focus on EMEA and North America. Its clients are enterprises in banking, insurance, and government, where models for KYC, claims and citizen processes speed up user decisions.

The vendor's strategic priorities are deepening agentic orchestration, expanding prebuilt libraries and adding sovereign deployments, giving users governed AI at scale. Its recent innovations include AI Knowledge Discovery, with agentic orchestration that enables grounded natural-language Q&A over unstructured content via citations. The platform offers composable model choices under a single pane for governance, audit and security controls.

Strengths

- **Product or service integration with common applications:** Tungsten Automation demonstrates a mature, end-to-end integration strategy supporting a complete API-first architecture. Prospective customers with complex and varied integration requirements should prioritize this capability.

- **Market understanding:** Tungsten Automation has a substantial portfolio of products spanning agentic orchestration through legacy OCR. Current and prospective customers need to understand this portfolio's breadth and depth in a market where the vendor and its product are synonymous.

- **Geographic strategy:** Tungsten Automation maintains significant staff, customer and partner presence in all regions except Latin America. This large reach means customers in North America, EMEA and Asia/Pacific will likely find in-person access to the vendor, its partners or their peers.

Cautions

- **Market responsiveness/record:** Both major and minor updates are released quarterly. While this is in keeping with the majority of vendors in this market for major updates, minor updates are typically released on a weekly or monthly basis. Whether this is a positive or negative for your organization, ensure the expectations of the business stakeholders are set.

- **Long sales execution:** Tungsten Automation's sales cycles take quarters rather than months. Prospective customers needing rapid procurement should seek to understand the vendor's reasons, plan ahead and set stakeholder expectations accordingly.

- **Customer acquisition:** While it has one of the largest customer bases in this market, acquiring new customers is a challenge for Tungsten Automation. Current and prospective clients should ask the vendor about net-new customers (new logos) in their industry, but also consider the vendor's expansion within existing customers.

UiPath

UiPath is a Leader in this Magic Quadrant. Its UiPath Intelligent Xtraction and Processing (IXP) product broadly focuses on data extraction.

UiPath's operations are geographically diversified in North America, EMEA and Asia/Pacific, and its clients are large enterprises in banking, insurance and healthcare. The vendor offers models for loans, claims, and prior authorization to speed workflows, among other use cases.

The vendor's strategic priorities target speeding user ROI through agentic IDP convergence, small language models (SLMs) and vertical solution packaging. Its recent innovations include its unstructured and complex documents capability that uses generative extraction via natural language to eliminate ML training needs.

Strengths

- **Product architecture and compliance:** UiPath supports a hybrid AI architecture that allows users to deploy specialized proprietary models, third-party foundational models, or BYOM subscriptions. Its AI Trust Layer and Model Hub provide centralized controls for enforcing data residency, applying PII masking, managing model life cycles, and ensuring compliance with frameworks like the EU AI Act and ISO/IEC 42001.
- **Data extraction:** UiPath employs validation AI agents that apply both deterministic business rules and nondeterministic reasoning to extraction results prior to human review. This multiagent approach helps cross-reference information across multiple complex documents, reducing manual review times and increasing straight-through processing rates.
- **Document workflow:** UiPath's IDP capabilities natively integrate into its broader automation platform and Maestro orchestration tool. This allows extracted data to flow directly into automated workflows and agentic processes without requiring third-party middleware or separate orchestration layers.

Cautions

- **Document complexity:** Processing highly technical documents like engineering diagrams or construction drawings remains in the early investment phase. The vendor acknowledges that specific improvements to the representation layer are still required to fully support these specialized visual formats.

- **Pricing:** UiPath uses a single flat consumption pricing model based on platform units; it doesn't vary based on the specific AI model. This approach to pricing may discourage organizations from working with UiPath if they are seeking lower-cost tiers for high volumes of simple, low-complexity document workloads.
- **Market perception:** UiPath is primarily recognized as a robotic process automation (RPA) provider, leading some buyers to view its document processing capabilities as a bolted-on feature rather than a stand-alone IDP solution. This perception can put the vendor at a disadvantage when competing for net-new, IDP-specific shortlists against GenAI-native point solutions.

Vendors Added and Dropped

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

Added

Vendors added in this year's Magic Quadrant:

- EdgeVerve
- Iron Mountain

Dropped

Vendors dropped from the Magic Quadrant:

- AWS
- IBM
- Google
- Graphwise
- Microsoft

Inclusion Criteria

In addition to Gartner client relevance, as determined by analyst expertise and opinion, providers need to meet the following criteria to qualify for inclusion:

Vendor Criteria

The vendor must:

- Have an established presence in the IDP market, as demonstrated by establishment prior to 1 January 2024, and actively competing with a generally available IDP product prior to 1 January 2025.
- Be recognized in the IDP market, as evidenced by regular appearances on client shortlists, by appearances at tradeshows, and by references as a competitor by other vendors.
- Provide a stand-alone product for IDP that is licensed and marketed as such, with no requirement to purchase or subscribe to any additional products/services.
- Have no more than 80% of customers (branded legal entities who have purchased and deployed a solution using the vendors' IDP product) in one geographic region, as follows:
  - EMEA
  - North America
  - Asia/Pacific
  - Latin America
- Have either offices with employees or on-site partners providing implementation and support to customers in the regions where the customer base is greater than 5%.
- Have more than 20% indirect revenue (through technology partners, implementation partners and others).

In addition to the above platform/product criteria, each participating vendor must meet one of the following financial and market share criteria (reported as constant currency):

- Audited/reported annual revenue of at least $20 million in the last 12 months (until April 2026).

or

- Audited/reported platform/product revenue growth of over 40% year over year when compared with the last 12 months until April 2026, AND company revenue over $14 million, *and* over 15 net-new IDP platform/product customers added in the last 12 months until April 2026.

Customer base size, growth and weight. All the following conditions must apply (by "customers" we imply "customers that purchased a license to use the IDP, not other products in the vendor's suite"):

- A minimum of 80 customers at the date of submission.
- A minimum of five new customers in the calendar year 2025.
- At least 10 active licensed customers with multiyear deals over $100,000 annually.

Product Criteria

The product must:

- Meet the Gartner definition for the IDP market including the purpose summary, mandatory and common features, as specified in the Market Definition section of this document.
- Be generally available as of 7 May 2026. (General availability means the product is fully released, available for purchase, and supported for current and prospective customers.)

Honorable Mentions

The providers that are most relevant to our clients were selected for evaluation in this Magic Quadrant. However, the decision not to evaluate a provider does not mean that the provider lacks viability. The following are noteworthy providers not included in the formal analysis. These providers could be appropriate for clients, contingent on their requirements:

Altilia offers a no-/low-code platform for IDP that allows clients to build AI agents for document workflow automation and organize enterprise data in a knowledge graph for semantic search and data integration. Users can leverage the knowledge graph and RAG techniques to retrieve and fine-tune LLMs and SLMs, tailoring AI agents as per enterprise requirements. The platform can be deployed as SaaS, private cloud or on-premises.

Archeiothiki offers AI Flows, its IDP platform for complex document workflow automation. It also offers scanning and digitization services, document management and mailroom automation among a broad portfolio of products. The platform offers a composite AI approach for document classification and extraction, and offers common document processing use case types as OOTB products. The platform can be deployed as SaaS, private cloud or on-premises.

Instabase differentiates its offering with an AI Hub that is exclusively GenAI-based, which is intended to reduce the time to value by minimizing requirements for data collection, annotation and model training. This approach aims to facilitate expansion into complex, multimodal GenAI use cases, such as interpreting graphs and plots, and supports conversational interrogations with documents for rapid insights.

Nutrient focuses on processing documents that require high reliability, repeatability and auditability at scale. The platform can extract data from documents, and create, convert and render documents with audit and governance workflows that are embedded within the platform. Users can build AI agents for automating document workflows. The platform can be deployed in the cloud, on-premises and in air-gapped environments.

Evaluation Criteria

Ability to Execute

Gartner evaluates how well vendors' products, processes, systems and methods enable them to be competitive, efficient and effective. This includes how well they understand and respond to emerging market trends, the alignment of their sales and marketing execution with the evolving needs of the market and the overall customer experience. The vendor's overall viability, operations and product or service scores also contribute toward their Ability to Execute.

Ability to Execute Evaluation Criteria

Evaluation Criteria	*Weighting*
Product or Service	High

Evaluation Criteria	*Weighting*
Overall Viability	High
Sales Execution/Pricing	High
Market Responsiveness/Record	High
Marketing Execution	Medium
Customer Experience	High
Operations	High

Gartner (September 2026)

Completeness of Vision

Gartner also evaluates how well vendors demonstrate understanding of the IDP market's current and future direction — including in relation to innovations, customer needs and competition — and the degree to which their vision aligns with Gartner's. This includes vendors' ability to anticipate market forces and create new market opportunities.

Completeness of Vision Evaluation Criteria

Evaluation Criteria	*Weighting*
Market Understanding	High
Marketing Strategy	High
Sales Strategy	Medium

Evaluation Criteria	*Weighting*
Offering (Product) Strategy	High
Business Model	High
Vertical/Industry Strategy	Medium
Innovation	High

Source: Gartner (September 2026)

Quadrant Descriptions

Leaders

A Leader must have a market-leading vision and the ability to deliver on that vision. Leaders have an insightful understanding of the IDP market, a reliable track record, the power to influence the market's direction, and an ability to attract and retain customers. In the IDP market, Leaders demonstrate understanding of enterprise customers' needs and of opportunities to expand functionality, and add new modules and services to their core IDP offerings.

A Leader may not always be the best choice for every customer. A focused, smaller vendor can sometimes provide superior support and commitment. Other vendors may provide a specialized capability that is essential for some organizations, such as OOTB fields for vertical-specific workflows, or specific features or functions (required, for example, by call centers).

Challengers

Challengers in this market have the operational capacity to serve a wide variety of enterprise needs in the IDP space through brand recognition and complementary product offerings. A Challenger must demonstrate sustained excellence in execution and a significant following — a combination that few vendors have achieved in this dynamic market. Their current limitations are centered on the appeal of the platform among their target users, and limited geographic and/or industry focus.

Visionaries

Visionaries are a market's innovators. They propel a market forward by responding to emerging customer demands and offering customers new opportunities to excel. Visionaries must also show insightful understanding of market trends and innovative strategies for marketing and sales, as well as for product and business management. Typically, these vendors appeal to leading-edge customers.

Niche Players

Niche Players typically specialize in a limited vertical or functional area, or have a strong product that is limited to fewer parts of the market or only one part. They are known to deliver solutions that meet the needs of their target demographics, but fail to demonstrate a broader appreciation of market trends and enterprise needs. Niche Players often represent the best choice for a specific category of customer or a particular use case.

Context

The market for IDP continues to grow as the demand around document process automation increases. There is also an increasing fragmentation, as many vendors offering products in other markets support IDP capabilities without marketing themselves as IDP solutions. Further, generative AI has led organizations to experiment not only with the classification and extraction parts of the process, but also to gain efficiencies in augmented handling of documents, including summarization, AI-enabled translation and natural language question answering.

Enterprise application leaders should use this Magic Quadrant research to develop an overarching cohesive strategy for how documents, and in future, other unstructured content types, need to be processed within the enterprise. As the requirements will vary depending on the use case, it will be critical for the underlying architecture to offer the required flexibility and composability. The success of an enterprise's IDP approach will depend on a number of factors, whether it's progressing from an out-of-the-box IDP product to a full platform or whether it's about designing its own agentic architecture. These include accuracy, ability to handle document variability, document workflow complexity, efficiency of the process and explainability.

Market Overview

Over the next three years, the intelligent document processing (IDP) market will continue its evolution from foundational document extraction tooling into an end-to-end intelligent automation layer for document-driven workflows. Rather than acting as a stand-alone processing step, IDP capabilities will be increasingly embedded inside platforms from adjacent markets, or orchestrated by agentic AI platforms, acting as the intelligence layer that feeds trusted, decision-grade data to both systems of record and systems of AI. Stand-alone extraction vendors that cannot connect data capture to downstream automated action face a significant risk of commoditization.

The rapid advancement of generative AI has expanded the market for addressable IDP use cases. Adoption is fueled by organizations migrating from structured, template-bound forms to highly variable, unstructured and long-form content, such as complex contracts, emails and multimodal rich media, including audio and video. As enterprise AI initiatives attempt to scale, the need for clean, validated data becomes a critical bottleneck. Because GenAI and agentic systems demand verifiable inputs to maximize output accuracy, IDP is solidifying its position as one of the sources for enterprise data.

Cost Optimization and Contextual Layer

As GenAI shifts from experimental pilot stages into high-volume production, organizations are facing strict decision economics and inference budget constraints. The brute-force application of large language models (LLMs) to every document creates unsustainable token inflation, increases the scope of error through hallucinations and unacceptable latency. Consequently, the market outlook highlights a strategic shift toward “inference layering” and “multimodel AI proxies.” In this operational model, platforms will dynamically route simple, high-volume transactional tasks to cheaper, deterministic ML models or domain-specific small language models (DSLMs), while reserving costly frontier LLMs strictly for complex reasoning and unstructured data extraction.

Multimodal and Agentic IDP

Vendors widely recognize that enterprise unstructured data increasingly includes chat, audio and video, and are expanding their capture capabilities to handle these formats natively. The market is shifting toward autonomous “agentic IDP,” where AI agents do not just extract data, but actively make decisions, trigger downstream actions and self-optimize.

The Shift to AI-in-the-Loop

While human-in-the-loop (HITL) review has traditionally been essential for quality control, the market is progressing toward AI-assisted review and AI-in-the-loop ecosystems. Iterations leverage "LLM-as-a-judge" mechanisms to prepopulate corrections, validate cross-document consistency and automatically flag structural anomalies before a human ever sees the document. The result will be vastly reduced cognitive load for subject matter experts (SMEs), allowing human workers to supervise AI agents rather than manually verifying baseline data extractions.

End-to-End Solution Approach Versus Composable Cloud-Service-Based Approach

This Magic Quadrant focuses on an end-to-end solution approach that embeds the entire document processing life cycle within a single solution. This approach doesn't require in-depth technical understanding of the underlying components, as the level of granularity is abstracted within the solution. A composable cloud-service-based approach, on the other hand, provides a way to bring together different composable services to build a solution. This approach requires technical expertise to build and maintain the solution from the ground up. Sample vendors include Amazon Web Services (AWS), Google, and Microsoft (see Select the Right IDP Implementation Approach: Solution-Based or Cloud-Service Based).

⊕ Evaluation Criteria Definitions