

Magic Quadrant for Horizontal Portals

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VIEW SUMMARY

Long-established vendors are broadening their offerings, and new players are increasingly exploiting alternative approaches in the well-established, but quickly evolving, horizontal portal market.

Market Definition/Description

Gartner defines a portal as a personalized point of access to relevant information, business processes and other people. Enterprise portals support a wide range of business activities and address various audiences, including employees, customers and partners, and citizens.

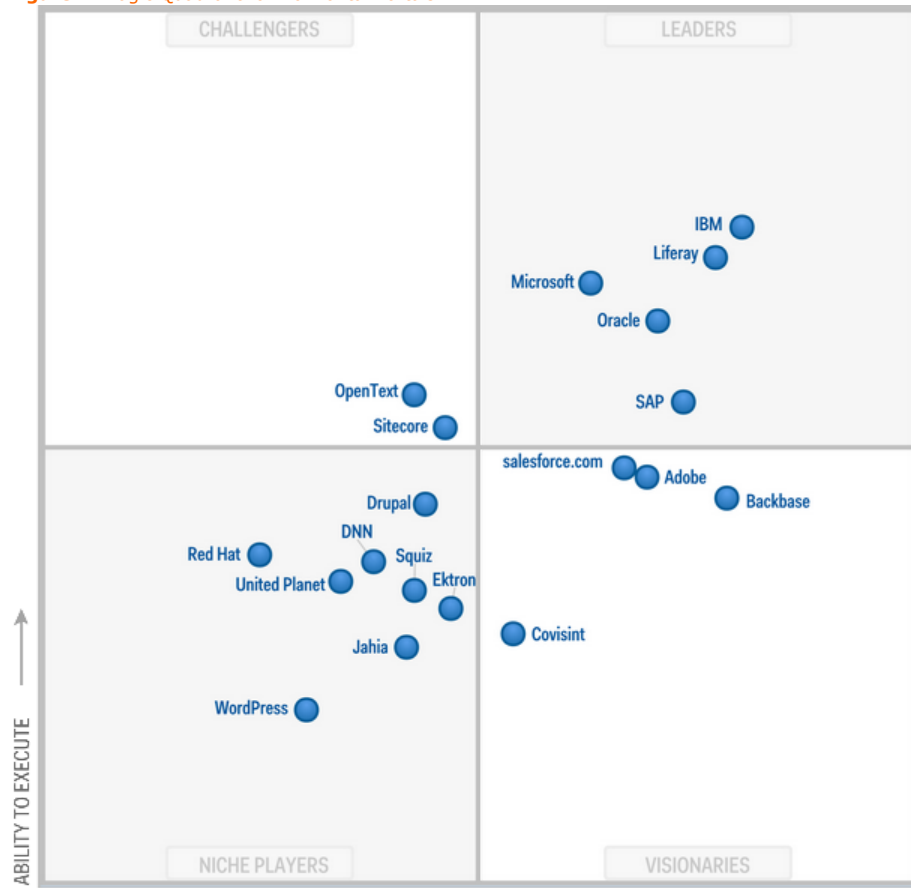
A horizontal portal product is a software application or service used to create and maintain enterprise portals. Horizontal portal offerings can be used to design, build and manage vertical or horizontal portals:

Vertical portals focus on providing access and interaction with specific applications or business functions.

Horizontal portals integrate and aggregate information from multiple cross-enterprise applications, as well as from various line-of-business tools and applications.

Magic Quadrant

Figure 1. Magic Quadrant for Horizontal Portals



Source: Gartner (October 2014)



EVALUATION CRITERIA DEFINITIONS

Ability to Execute

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

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

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

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

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

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

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

Completeness of Vision

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

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

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

Offering (Product) Strategy: The vendor's approach to product development and delivery that emphasizes

Vendor Strengths and Cautions

Adobe

Adobe's entry into the horizontal portal market is the Adobe Experience Manager (AEM) offering, which includes the Web content management (WCM) capabilities of the former CQ5 product and the digital asset management capabilities of Scene7. More broadly, Adobe is a provider of digital asset creation and digital marketing technologies and services. Adobe's Creative Cloud and Marketing Cloud are best-of-breed offerings among creative professionals and marketers. The Adobe Marketing Cloud provides additional complementary services, including Adobe Target, Adobe Analytics and Adobe Social. Adobe's collection of technologies and services makes it a suite-oriented portal vendor, and Adobe has a leading entry in the emerging user experience platform (UXP) market.

Strengths

The depth and breadth of Adobe's offerings make it particularly powerful in customer-facing and digital marketing use cases. Adobe is well-suited for customer-facing use cases, especially those with a heavy digital marketing or e-commerce component.

Adobe's technologies and services are open-architected and extensible, and they use Java standards that are popular among large enterprises. Adobe recently enhanced its integration across Marketing Cloud, making AEM the core repository for most digital marketing and creative assets.

Adobe is among the most advanced portal vendors in the area of context awareness. AEM's personalization and content targeting capability can be based on generic user-centric and session-centric attributes, as well as dynamic marketing and e-commerce attributes. Context awareness is a crucial factor in the effectiveness, scalability and versatility of modern portal platforms.

Cautions

Adobe struggles to be recognized as a core enterprise vendor. Adobe is much better known in the marketing department than the IT department.

Adobe's ongoing focus on digital marketing makes non-customer-facing deployments somewhat of a risk. Organizations pursuing employee, partner or citizen efforts may find themselves having to adapt or complement an offering not directly suited to their requirements.

Some customers report AEM's costs are higher than the industry average. Adobe's typically marketing-centric, customer-facing initiatives sometimes entail higher costs than most partner-, employee- or citizen-facing efforts. Adobe cannot demand its typically high price for some industries and audiences.

Backbase

Backbase has rebranded its portal into a Customer Experience Platform (CXP), acknowledging that it is used to support largely customer-related scenarios, including customer service, customer self-service and digital marketing. Backbase continues to provide a lean portal platform based on a modern, Web-oriented architecture (WOA) and widget-based container model. The company has also established a substantial presence mainly in the financial services vertical, with medium to large deployments that have begun expanding into Asia/Pacific through its business partners. Backbase's offering is available for on-premises deployment or in a private cloud model.

Strengths

Backbase is among the most innovative vendors in the portal market. Among recent developments, the company has opened its Launchpad — a set of prebuilt templates, widgets and apps — to partners to generate a large ecosystem of components that enable a relatively out-of-the-box implementation for a wider range of purposes.

Backbase's lean portal is at the center of its ability to address the speed in deploying a UXP that is often sought, but rarely achieved, by organizations with portal initiatives.

Backbase has done well to expand its partner ecosystem over recent years. Strategic partners such as Accenture, Atos and Capgemini have given Backbase crucial inroads into geographic regions such as Asia/Pacific, where Backbase had a limited presence a year ago.

Cautions

Backbase's lack of a track record in some industries, combined with its low profile compared with portal leaders, limits its appeal to customers outside the financial services market. Recent positioning around customer experience scenarios may result in continued growth for the company, but it may leave customers and prospects with other types of portal initiatives less well served.

Backbase's fast pace of innovation and relatively rapid growth have caused problems for some existing customers. Some self-supporting customers — those not relying on third-party professional services — report subpar support and relative lack of insight or influence in Backbase's road map and development plans. Communication and support channels are not as well-established and mature as those of portal market leaders.

Customer-facing portals almost invariably require best-of-breed content management capability. Backbase must improve its partnerships with vendors of key adjacent technologies, particularly WCM, document management and enterprise social networking. While Backbase has been working to include more native WCM capability in recent product developments, it has yet to gain a reputation as a provider with full-fledged WCM capability on its own.

Covisint

differentiation, functionality, methodology and feature sets as they map to current and future requirements.

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

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

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

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

Covisint is now an independent public company after completing its initial public offering (IPO) in September 2013. Covisint continues to broaden its functional and industry applicability via differentiated cloud-based horizontal portal services. Covisint's B2B Cloud Platform portfolio encompasses identity and access management services, data exchange and integration broker services (messaging hub), and an API-driven platform for third-party development (AppCloud), in addition to a portal platform as a service (PaaS). Covisint uses the Liferay Portal framework to support its customers.

Strengths

Covisint was one of the first portal vendors to offer a legitimate portal PaaS offering. While various other vendors must rearchitect their products and realign their businesses to adapt to emerging demand for portal PaaS, Covisint's 14-year heritage lies in the cloud. The portal PaaS opportunity is likely to grow considerably in the coming years.

Covisint's security, data exchange and integration expertise complement especially portals in complex B2B and supply chain scenarios and could point toward a future standard for interenterprise portals. Covisint's customers have been among the early innovators of the Internet of Things (IoT), raising its potential to be part of digital business initiatives.

Covisint's client references cited strengths in ease of deployment, reliability of enhancements and ability to integrate with internal systems. Integration has been a particular problem for organizations implementing other vendors' cloud-based portal platforms.

Cautions

Covisint's autonomy and market visibility in the portal space since its September 2013 IPO has increased the scrutiny of the company, its financial performance and its operations. Covisint has experienced a substantial stock price decline since the IPO, and its CEO has been replaced. Although Covisint generated significant operating capital from the IPO for growth and development initiatives, some current customers and prospects report concerns about the vendor's future.

Covisint's opportunities outside the automotive industry have not materialized to the extent expected. Current customers consistently value the organization's industry expertise and its existing network, so the company must reach a critical mass of customers in other industries to gain the expertise and customer traction that characterize its value among existing customers.

Some customers report difficulty with platform upgrades. The complex, highly specialized nature of many of the solutions running on the Covisint platform can make upgrades and enhancements particularly challenging.

DNN

The DNN Platform is the most prominent example of open-source software in the Microsoft ecosystem. DNN, the company behind the product, rebranded its commercial content management solution as Evoq in July 2013. The DNN offering supports portal scenarios with a framework of dynamic components (modules), which exist within a hierarchy of containers ("panes") that are placed on pages, with formatting controlled by a styling mechanism ("skins"). As with other portal products, a security and permissioning model applies to different elements of the system at different levels of the content hierarchy. Recent additions include support for mobile devices, social computing, collaboration, cloud deployment, e-commerce, workflow and user analytics. The DNN system has been widely adopted in the course of its 10-year history and now powers 750,000 websites globally.

Strengths

DNN is distinct in its ability to leverage the Microsoft technology stack, as well as the widely available Microsoft development expertise, with an open-source model. Organizations looking for .NET-based alternatives to Microsoft SharePoint for portal initiatives often look toward the DNN platform.

DNN's liberal open-source license and ease of acquisition, installation and use have resulted in widespread adoption. Organizations can install a trial version of the newly released cloud offering (built on Microsoft Azure) in one minute. DNN's 750,000-public-site presence is unmatched by most commercial portal platforms.

The ability to support and manage multiple sites on one instance has been a long-standing strength of the system. Experienced, self-sufficient portal and Web-savvy IT organizations — both large and small — have managed impressively large and diverse Web presences with relatively few IT resources.

Cautions

DNN faces formidable competition from complex suites, such as Microsoft SharePoint at the high end of the portal market, as well as from simpler packages such as WordPress and Umbraco at the low end of the portal market.

The Microsoft .NET technology stack that DNN employs is at odds with open-source dynamics and is generally unpopular with the open-source community.

DNN has demonstrated only limited integration with enterprise systems. Some customers employing large numbers of third-party components suffer from the complexity and volatility that accompanies working with many small providers.

Drupal

Drupal is a PHP-based, open-source content management and portal platform that powers almost 2% of the world's websites. Drupal has proliferated largely outside of enterprise IT environments, but it is rapidly gaining traction in the government, media and entertainment, education, and retail sectors. Although Drupal is an open-source offering, an ecosystem of implementers and hosting providers offer

support and service for a fee. The most prominent of these is Acquia, a company cofounded by Dries Buytaert, the primary author of Drupal. In August 2014, Acquia secured a \$50 million investment from various partners and an unspecified amount from Amazon to further expand in the enterprise.

Strengths

Drupal has experienced widespread adoption in external-facing scenarios and is among the most frequently used platforms powering websites in the world. While its enterprise traction has been mostly project-based or departmental in scope thus far, it is increasingly used for strategic websites and customer-facing portals in the government, media and entertainment, and education sectors.

A large ecosystem of plug-ins can be used to extend and modify Drupal to fit almost any scenario. Because of the broad adoption, the number of plug-ins available is substantially larger than on most other platforms.

Drupal is inexpensive and easy to deploy for relatively simple portal deployments.

Cautions

Although Drupal is used in portal scenarios, the product focuses primarily on WCM use cases. Some customers find Drupal requires customization, third-party support and complementary software to adequately support portal scenarios. Drupal's leading support vendor, Acquia, does not focus on portal use cases.

Drupal is built using PHP, which is not as well-established in enterprise IT as Java and .NET.

Enterprises have to leverage the third-party plug-in ecosystem of Drupal for more-sophisticated portal scenarios, and this can raise complexity and cost. Deploying a multitude of plug-ins with different publishers and upgrade cycles can challenge governance, maintenance, testing and security resources.

Ektron

Ektron, primarily known as a WCM vendor, appears in the horizontal portal Magic Quadrant for the first time. Ektron's core WCM offering, in conjunction with its Content Marketing Platform and Digital Experience Hub (DxH), delivers portal functionality. Even though the primary target for Ektron is customer-facing, digital marketing portals, the vendor has a long list of customers supporting other portal scenarios — frequently intranets and other business-to-employee (B2E) sites.

Strengths

Ektron's current offerings, along with its DxH solution, are strong and well-suited to digital marketing use cases. The solution offers a good balance between built-in functionality and interoperability with an array of third-party products and platforms. The prospect of allowing marketers to deploy and manage websites without IT intervention also aligns well with emerging digital marketing strategies among enterprises.

Ektron has a pluggable architecture that allows it to be deployed in .NET, Java, and Linux, Apache, MySQL and PHP (LAMP) environments. Ektron's primary use of the .NET platform allows it to benefit from the organizations trying and failing to use SharePoint or other .NET-based solutions to address portal initiatives. Meanwhile, it has been successful in interoperating with systems and services based on other languages. Customers note extensibility and interoperability through an improved framework API.

Ektron has an impressive list of marquee customers and partners.

Cautions

Ektron's marketing focus has kept it off of portal shortlists for which it's well-qualified. While it promotes WCM and digital experience management focused largely on digital marketing scenarios, it is relatively unknown as a provider of technology for portal initiatives. To help differentiate itself in the emerging and highly competitive digital experience management arena, the company must also promote more B2E and B2B portal use cases.

Ektron's personalization model is not as well geared to B2E or B2B portal scenarios as it is to customer portal scenarios. Advanced portal initiatives require a wide range of personalization capabilities, whether based on permissions, static attributes stored in Lightweight Directory Access Protocol (LDAP) or other repositories, dynamic behavior, relationships, or session-based attributes. While Ektron's DxH integration service enables many of these capabilities, the company's approach is marketer-centric and focused on content targeting applications.

Ektron has experienced some growing pains, and some customers have felt their impact. Some references reported challenges with customer support, which may be attributed to Ektron's unique lifetime product support policy and the significant portion of customers running on older versions of its software.

IBM

IBM WebSphere Portal is both the center of IBM's digital experience strategy and the core of its emerging UXP offering. IBM's Digital Experience offering, a major element of its new ExperienceOne strategy, focuses on two areas: the Employee Experience Suite and the Customer Experience Suite. Recent improvements to the WebSphere Portal include a script portlet geared toward improving interoperability and empowering citizen developers, and a Digital Data Connector, which supports consumption of a set of open APIs into the portal. IBM has been working to provide interoperability and streamlining across offerings such as Web Content Manager and Connections. IBM will be enhancing Version 8.5 of WebSphere Portal with more end-user portal creation features, tighter integration with its portfolio of digital marketing technologies and more cloud deployment options.

Strengths

IBM's long heritage of leadership in the enterprise portal market has brought it the broadest feature set in the industry. IBM has a long list of marquee customers across vertical industries, and it has demonstrated support for nearly every type of B2E, business-to-consumer (B2C) and B2B portal initiative.

IBM's shift to a broader Digital Experience strategy puts it in the company of a small set of industry visionaries that have aggressively embraced this industry trend. IBM also has had the foresight to exploit portal capabilities and the experience of its installed base as the backbone for separate solutions in the employee- and customer-centric areas.

IBM's customers report that WebSphere Portal is highly reliable, scalable, secure and well-architected for portal initiatives requiring complex integration, mixtures of content and applications, and multisite and multichannel topologies.

Cautions

WebSphere Portal can be complex and expensive. Some customers with relatively low scale and/or simple portal requirements express dissatisfaction with WebSphere's total cost of ownership (TCO) and implementation times. They also report cumbersome installation and upgrade processes and difficulties tuning the software. Organizations lacking a substantial software or service relationship with IBM often face high prices and steep learning curves. IBM is introducing new pricing and deployment options to address these concerns, but their impact is yet to be seen.

IBM's broader Digital Experience strategy, while compelling and complete, requires a substantial commitment in money and time. While IBM continues to apply open standards and publish APIs to support interoperability, lock-in is a resulting concern for some customers.

The long heritage as a leader in the portal market has, in some cases, become a liability for IBM. Many long-standing portal efforts, whether or not backed by IBM WebSphere Portal, have failed or grown stagnant over time, and customers desiring newer approaches and experiences are sometimes averse toward traditional portal software. Customers and prospects often regard WebSphere Portal as a traditional portal software.

Jahia

Jahia provides an open-source Java platform that combines WCM, document management system (DMS) and portal capability with a unified interface geared to business users. Founded in 2002 and headquartered in Geneva, Switzerland, Jahia is working to establish a greater presence in North America, with offices in Washington, D.C., Chicago and Toronto. Jahia's "Digital Industrialization" offerings include Digital Factory, Workspace Factory, Portal Factory, eCommerce Factory, Jahia Private App Store and Jahia Studio.

Strengths

Jahia is one of a few vendors with a single unified portal and WCM platform built from the ground up. Customers report that Jahia is open and flexible enough for them to quickly build and scale portals, websites and applications. Jahia is highly regarded for value relative to cost compared with most other portal vendors.

The enterprise market is seeking another simple, lightweight and agile Java portal player against Liferay. Although Jahia has a small number of customers, these customers are sophisticated and large in size. Current customers span across industries such as government, retail and government, where portal capabilities are in high demand.

Jahia's intuitive user interface uniquely accommodates a range of portal roles — from architects and developers to administrators and marketers managing websites and content. Support for various roles is part of the organization's Digital Industrialization theme, treating the creation, development and management of portals, websites and Web applications like a factory assembly line.

Cautions

Jahia's market visibility is low. While the organization's focus on refining the software and supporting current customers has served it well in the early stages of its business, it must gain market share and mind share to assure customers and prospects of its long-term viability and its competitive prospects against much larger vendors.

Some customers report challenges with initial deployment of Jahia in support of portal scenarios, including unanticipated complexity and difficulty with upgrades. Some customers have advised caution when creating custom applications and integrations. Jahia asserts that it has addressed these concerns with version 7 of its suite.

Jahia is a small company in terms of revenue as well as employees supporting engineering, service and support, professional services, marketing, and sales. It will need to grow quickly to support enterprise demand.

Liferay

For the past several years, Liferay has had the fastest-growing Java-based portal, increasing its market momentum even as other Java portals from established large vendors have slowed in growth.

Enterprise initiatives most frequently employ the commercially supported Liferay Portal Enterprise Edition, which is available primarily on a subscription basis. Organizations pursuing project-based portal initiatives and smaller organizations often use the free open-source Liferay Portal Community Edition. Liferay also makes its Enterprise Edition available to independent software vendors (ISVs) as an OEM offering. Liferay Portal Enterprise Edition is now at version 6.2 and boasts upward of 1,700 customers.

Strengths

Even in the face of increasingly large, complex deployments, Liferay continues to build up a pool

of satisfied customers. Liferay Portal has often succeeded where portal initiatives using other products were bogged down in cost and complexity. The open-source option can mean greatly reduced costs for organizations with sufficient in-house resources to take advantage of it.

Liferay is focused, agile and able to maintain a faster pace of development than most in terms of adding features such as support for mobile and social computing. Liferay has proved that it can respond quickly to requests for added functionality and other changes in market demand.

Even in the face of substantial growth, Liferay has retained its customers' high regard for its support. Customers rate Liferay among the highest of portal providers in the quality and effectiveness of customer support and professional services.

Cautions

Despite its growth, Liferay remains a small company competing among some of the largest vendors in the enterprise software market. Some prospects question Liferay's viability in comparison with other portal market leaders. Some prospects are unaccustomed to open-source licensing, support and product update models, and some are more comfortable with commercial providers.

Although the Liferay ecosystem is growing and some major system integrators are adding Liferay to their skill set, the ecosystem is still relatively sparse and populated with smaller players. Some customers cite difficulty finding adequate skills and professional services to support their efforts. Some geographic regions may have limited resources for development and support.

Some customers note that fewer features required for portal projects are available out of the box with Liferay than with other vendors' portal offerings.

Microsoft

Microsoft's horizontal portal capability resides in its SharePoint offerings. SharePoint also serves enterprise document and content management, search, collaboration, social networking and workflow, and business intelligence needs. SharePoint is available as an on-premises server offering (the latest version of which is SharePoint 2013) and as a subscription-based SaaS application (SharePoint Online). SharePoint Online is part of the Office 365 for Business suite, which also includes Office in the cloud, Outlook and Exchange Online email and calendaring, online conferencing, Yammer social software, and OneDrive for Business enterprise file sync and share (EFSS). Microsoft has been aggressively urging customers toward cloud-based SharePoint Online as part of the broader Office 365 push while encouraging hybrid approaches for leveraging existing SharePoint Server investments.

Strengths

SharePoint is the most popular and widely known portal brand. Its broad range of functionality and its relationships with Microsoft's other dominating offerings have far-reaching appeal. SharePoint's popularity has given rise to an unmatched ecosystem of partners, system integrators, third-party software vendors and communities to support SharePoint's use for a wide variety of business processes and industries.

SharePoint's recent developments align well with many organizations' aspirations for their B2E portals and intranets. New capabilities in SharePoint and the broader Office Suite, such as the Office Graph, the incorporation of Yammer social technology, and search-driven experiences, show potential as the basis for an engaging digital workplace rather than the often stagnant information-centric intranets that many organizations are attempting to update or replace.

Microsoft's new app model, the Client-Side Object Model (CSOM), should allow customers and partners to interoperate more readily with a variety of third-party systems. It should also allow organizations to leverage innovation and development skills outside of the .NET ecosystem.

Cautions

Microsoft's push toward the cloud and Office 365 could limit SharePoint's versatility as a portal platform. The vision points directly to intranet and other B2E scenarios versus B2C and B2B scenarios. Microsoft's intention to make SharePoint a more out-of-the-box experience threatens to make SharePoint more rigid and less customizable.

While developments such as the CSOM and the Office Graph API are designed to ensure interoperability with non-Microsoft products and services, a broad view indicates a potential for lock-in. SharePoint is becoming part of the fabric of Office overall — meaning it will become more tightly tied to Exchange and Office as they move into the cloud. New products and features may compel customers to pursue a Microsoft-only strategy, potentially compromising their negotiating position and limiting their ability to employ best-of-breed software in areas related to horizontal portals.

The future of on-premises SharePoint Server is in question. While Microsoft asserts it will continue to support on-premises SharePoint deployments as long as customers demand it, the company makes no apologies for prioritizing SharePoint Online over SharePoint Server. SharePoint Online will get new features first and may also get features that will be unavailable on future SharePoint on-premises offerings. Organizations that can't employ, for various reasons, a cloud-based SharePoint may do better with a different portal provider.

OpenText

OpenText positions its portal offering as an integral component of its Enterprise Information Management platform. OpenText Portal is derived from OpenText's acquisition of Vignette, a company that had itself acquired early portal market leader Epicentric. OpenText Portal is intended to aggregate content and applications for use across Web initiatives inside and outside the firewall. The OpenText Portal is also part of OpenText's Customer Experience Management platform, working alongside OpenText's solutions for WCM, social media, digital asset management and customer communications management.

Strengths

The combination of OpenText Portal and Web Experience Management is powerful and especially well-suited for customers requiring a mix of content and applications, as well as for those requiring multisite hierarchies that support global and local efforts.

Customers commend OpenText Portal for flexibility — specifically, the ability to produce highly customized and differentiated portals without compromising the ability to upgrade. Managing custom-developed applications through upgrades is a frequent pain point for enterprise portal customers using other platforms.

Customers rate OpenText Portal's scalability higher than most competing portal platforms.

Cautions

The value of OpenText Portal is often realized only as part of the total OpenText Enterprise Information Management offering. Customers looking to employ enterprise content management (ECM) and WCM systems from other vendors to support their efforts are unlikely to find OpenText Portal a worthy option.

Compared with competing portal platforms, OpenText Portal requires expert professionals to build and integrate portals successfully.

OpenText's momentum in the portal market during the past several years is lacking. OpenText Portal customers report that the offering has not kept up with the features and functions of competitive offerings.

Oracle

Oracle WebCenter Portal acts as a composite application framework, and it has the ability to aggregate, present and contextualize a wide range of information and applications, including Oracle Cloud Applications, third-party systems, and content. Oracle's most recent investments in WebCenter Portal entail supporting digital experiences, enabling mobile channel delivery, empowering business users and broadening options for cloud deployment. The WebCenter brand encompasses a suite, including Oracle WebCenter Sites (for WCM), Oracle WebCenter Content (for ECM) and Oracle WebCenter Portal.

Strengths

Oracle has retained experienced leadership, development talent and knowledge derived from its various acquisitions of portal and adjacent technologies, including capabilities from BEA Systems, Plumtree, Sun Microsystems, Siebel Systems, Stellent and Art Technology Group (ATG). Oracle supports sophisticated, knowledgeable and influential customers — in challenging industries such as telecommunications, aerospace and financial services — through these acquisitions.

Oracle is one of a few vendors with the product breadth, technical means, experience and motivation to realize the vision of a portal as a versatile composite framework for contextualizing information, applications and business processes, and then making them available proactively and pervasively.

Oracle is strong in supporting a wide range of vertical industries at considerable depth. Oracle has demonstrated solutions for financial services, telecommunications, insurance, retail, government, education and financial services, among many other sectors. It has also produced portals for various business purposes and audiences, from supplier portals to customer service portals to employee portals.

Cautions

Unforeseen costs and complexity at some large organizations have kept WebCenter Portal from gaining the positive track record that would fuel vibrant growth in the market.

Oracle's highly acquisitive strategy has left some customers with products that have changed direction. Some customers complain about lack of foresight into the product road map and licensing complexity that accompanies a continually evolving portfolio.

Despite the attraction of an integrated WebCenter suite, customers cite a lack of ready integration with WebCenter's primary products as a concern. Gartner discussions with clients indicate Oracle is losing some customers and prospects to leaner, lower-cost portal offerings.

Red Hat

Red Hat JBoss Middleware's most recent portal offering is JBoss Portal 6.1, which Red Hat released in 2013 as a lean portal choice for building self-service applications. While the product has an open-source appeal, JBoss Portal is used primarily by organizations that are heavily committed to the Java-based JBoss Enterprise Application Server platform.

Strengths

The Red Hat JBoss Portal is well-regarded by some clients for performance and scale relative to many other portal providers' offerings.

The JBoss Portal has ample flexibility to support systems that require custom development, unique security rules, and the mixing and mashing of various frameworks. These qualities are especially beneficial to organizations that have small budgets for packaged software but ample internal resources for custom development.

There remains substantial opportunity for vendors such as Red Hat to exploit emerging portal market trends, including considerable dissatisfaction with more-established portal products in the Java space. Some customers are looking for lower cost, leaner systems, systems offering cloud-based portal services and systems supporting heterogeneous environments.

Cautions

Red Hat appears to be bypassing much of its portal market opportunity. In general, the portal offering has failed to keep in step with other providers in meeting demands deriving from social, mobile cloud and big data.

Organizations with high expectations of immediate business benefit and out-of-the-box usability are often disappointed with JBoss Portal. JBoss Portal offers less ready-to-use functionality and fewer prebuilt components and templates than most other portal providers' offerings.

JBoss Portal lacks the mind share in the portal market that some customers might expect from a provider of Red Hat's size. JBoss Portal has declined in the frequency of its appearance on portal selection lists, even when the offering seems well-suited to the requirements.

salesforce.com

Salesforce.com is attempting a transformative approach to the horizontal portal market. It no longer offers a named portal product in its portfolio. Rather, Salesforce Communities leads the effort and replaces salesforce.com's Customer Portal and Partner Portal offerings. Salesforce Communities incorporates Chatter social messaging, Site.com Web publishing and Visualforce Web page layouts to address internal and external portal needs. Salesforce.com complements the offering with its cloud development platform and cloud-based business applications. The company has recently unified its various properties under the Salesforce1 brand, which represents an API, a mobile app deployment/management container and a framework.

Strengths

Salesforce Communities' transformative, people-centric and social approach to the enterprise portal market resonates with the many organizations seeking to replace or rejuvenate their intranets, extranets and customer-facing portals. The offering is experiencing rapid, viral growth among salesforce.com customers seeking alternatives to traditional portals.

Customer satisfaction with salesforce.com's offering is high compared with most other portal providers' offerings. Customers cite Salesforce Communities' flexibility, customizability, ease of integration and mobile readiness among the offering's strongest attributes.

Salesforce Communities leverages the rich functionality in the company's suite of business applications, as well as third-party products and services from salesforce.com's large ecosystem of partners. The Salesforce1 Platform allows for high productivity development of Web and mobile applications.

Cautions

Despite finding a home in Salesforce Communities, the organization's portal capability remains obscure to many customers and worthy prospects. Salesforce.com does not appear on Gartner customer selection lists as often as might be expected from such a large, influential organization.

Although the company supports open standards such as HTML5 and JavaScript, much of the development is done with Apex (a proprietary Java-like programming language) and with internal templates and metadata definition dialogues. Requirements for specialized skills can add to costs and limit success rates.

Some customers report high initial cost and high TCO relative to many other portal platform providers' offerings.

SAP

SAP's portal strategy, as it relates to the company's overall UX strategy, is going through a transformation. SAP's long-established offering is SAP Enterprise Portal, a product derived from its acquisition of TopTier in 2002 and now in its seventh major version. However, SAP's UX initiative has given birth to new, alternative means of providing contextual access to relevant information, business processes and people, including SAP Hana Cloud Portal and SAP Fiori Launchpad.

Strengths

SAP rates highly for innovation, especially in its investment in UX principles, practices and technologies. SAP's work to institutionalize design thinking will help address long-standing problems with SAP's usability and flexibility. Developments such as the Fiori Launchpad and Hana Cloud Portal point to a more pervasive user- and role-centric portal capability.

SAP's established position as a provider of systems of record, such as ERP and CRM, gives it a firm footing in a market looking to integrate with, leverage and extend these systems and the vital processes they support. Several customers cite integration with ERP, CRM and other SAP applications of record as being among the strongest attributes of SAP as a portal platform provider.

SAP's vertical market strategy puts it in a favorable position to understand and meet diverse portal market requirements.

Cautions

The perceived split between the established Enterprise Portal and newer developments, such as Fiori Launchpad and SAP Hana Cloud Portal, is confusing customers and hampering SAP's portal execution. Most existing customers still recognize Enterprise Portal as the only portal offering, and its reputation is sometimes unfavorable based on some clients' past experience. Despite a high adoption rate, Fiori Launchpad and Hana Cloud Portal remain relatively small and largely unproven in portal scenarios.

Many existing customers list among their complaints a difficulty of customization and a relative weakness of collaboration, social and content management capabilities within the Enterprise Portal offering.

While SAP's portal innovation has focused largely on UX innovation across channels, more effort must be devoted toward context-aware computing. The Hana platform's big data capabilities could enable a more automated, personalized portal experience.

Sitecore

Sitecore is a new entrant in the horizontal portal Magic Quadrant. Sitecore's Customer Engagement Platform is a .NET-based multichannel marketing and content management system used to manage customer experience across the digital Web, mobile, social, email and commerce experiences. Sitecore appeals most directly to organizations seeking WCM capability for customer-facing Web initiatives, but its offerings are increasingly considered for portals of supporting various business processes and audiences.

Strengths

Sitecore's platform is particularly valuable for marketing-centric, customer-facing portals requiring a range of integrated components, such as marketing automation, A/B and multivariate testing, and campaign management. Customers also value Sitecore's pluggable architecture and ecosystem, which allow it to readily invoke complementary capabilities from best-of-breed providers in areas such as social software, streaming media and language translation services.

Sitecore has succeeded in expanding its global presence across North America, Europe and Asia/Pacific by increasing local offices, offering regional autonomy and engaging diverse partners for consulting and implementation. The global expansion and partnership strategy have also helped it expand into a broader range of industries.

Sitecore has a strong and comprehensive mobile strategy compared with many portal vendors. The company's aggressive entry into the Japanese market necessitated a proactive mobile approach that includes a mobile software development kit (SDK), adoption of HTML5, incorporation of responsive Web design, and integrated device simulation capabilities that help organizations visualize and test experiences delivered across mobile devices.

Cautions

Some organizations with B2E or B2B portal initiatives find Sitecore's platform expensive and overcomplicated when compared with other portal products. Sitecore's investments and innovations target WCM and customer experience use cases.

Convergence of demand across portal and WCM initiatives increasingly bring Sitecore into competition with ever-larger and more-comprehensive vendors. Whether Sitecore wants it or not, customers will increasingly demand that Sitecore support portal scenarios. Portal scenarios require an ability to aggregate and contextualize information and applications derived from various sources.

Satisfaction among Sitecore's customers varies considerably, depending on the system integrators they employ. Considering the customers' shrinking budgets and increasing speed at which customers expect their deployments, Sitecore must continue to improve partner training and certification.

Squiz

Squiz is an Australia-based provider that makes its first appearance in the horizontal portal Magic Quadrant. The Squiz Suite is a platform offering combining PHP-based WCM (Squiz Matrix), search (Funnelback), social software (Roadmap), content evaluation and migration (Transform), and analytics (Squiz Analytics). While the products are available as stand-alone or combined offerings, only the combination meets the functional criteria for a horizontal portal offering. Squiz offers the products on-premises or in the cloud. Squiz also offers professional services, developed solutions and support services.

Strengths

Squiz successfully leverages a strong and growing open-source community. It maintains an open product road map called SquizMap for customers and Squiz Matrix developers. The community generates and collaborates on product ideas and features to ensure the platform evolves in line with customer demand.

Squiz is architecturally uncomplicated compared with many larger organizations serving the portal market. Squiz Matrix, Funnelback, Analytics and Roadmap have logically separate yet complementary roles. Squiz has exploited its capable Funnelback search technology to aggregate information from many sources and drive dynamic context awareness.

Squiz holds an appeal for organizations looking for purpose-built solutions, such as a global intranet or a members' portal, rather than just generic toolsets or platforms. The combination of an open-source platform, a complementary set of software components, professional services and support, and cloud services has led some customers to faster, more satisfactory outcomes than more-established portal offerings.

Cautions

Squiz's lack of global presence and limited industry focus restricts its appeal to some enterprises. Squiz's presence is predominantly in the Australia and New Zealand regions, with a significant presence in the U.K. and Europe. It opened its doors in North America only within the year. The company has demonstrated domain expertise and traction in the government and higher education industries.

Squiz is known primarily as a WCM provider, despite its potential to serve as a portal platform provider. Squiz's customers often use Squiz Matrix in combination with horizontal portals from other vendors, indicating that for some customers and scenarios, this offering cannot be used as a portal platform on its own.

Customer feedback indicates a need for portal standards support (such as Web Services for Remote Portlets [WSRP] or Java Specification Request [JSR] 168), personal portals, and better end-user customization.

United Planet

United Planet has a client base concentrated largely in Europe, with a growing partner network reaching out to customers worldwide. The vendor focuses primarily on small and midsize businesses (SMBs) and B2E deployments. United Planet's primary portal offering is Intrexx 6.0 Professional edition. It also offers Intrexx Compact for smaller organizations and workgroups, as well as Intrexx Share, introduced in April 2013 as a platform for social intranets.

Strengths

Ease of implementation and ease of deployment are clear strengths for United Planet. United Planet's mantra of "portal orchestration rather than implementation" is fulfilled through its ease of use for nondevelopers as well as its Application Store, which includes more than 100 components (ranging from simple apps to holistic support for business processes such as human resources, marketing and procurement).

Satisfaction among United Planet customers — for factors ranging from ease of use to performance and value relative to cost — is consistently higher than other portal vendors.

Intrexx makes some tasks, such as integration and aggregation of third-party data sources, readily accessible to portal and Web administrators with relatively few development skills. Connectors for third-party systems from SAP, Microsoft, IBM and others make the task of integrating and aggregating third-party information sources and systems of record easy compared with most other products.

Cautions

United Planet's installed base is centered almost exclusively in Western Europe. Lack of a global presence has limited United Planet's appeal to global organizations and organizations outside of its region.

Intrexx's "out-of-the-box" characteristics are more suitable for the SMB segment than larger enterprises looking for portals as platforms for differentiation and customization. Intrexx is also geared primarily for internal B2E scenarios. B2B and B2C scenarios are not as often supported, although United Planet reports increasing momentum in these use cases.

United Planet must build a larger, stronger partner ecosystem to accelerate its adoption.

WordPress

Enterprises increasingly consider WordPress for lean portal initiatives. WordPress offers simple content management based on a modular framework that uses plug-ins to extend core functionality. Customers use the componentry to enable personalization, integration, security and analytics capability required of portal initiatives. Automattic, the primary vendor behind WordPress, provides support and hosted services for many of WordPress' enterprise customers.

Strengths

WordPress is unmatched in popularity. It is estimated to power more than 22% of all websites (more than 66 million total). Although the vast majority of these are simple content-centric websites, organizations are increasingly considering WordPress for enterprise portal use. They often regard its popularity as evidence of its versatility and viral success, where many IT-sanctioned enterprise portal systems have failed.

WordPress and its customers benefit from an enormous ecosystem of plug-ins, partners and services. The ecosystem leverages the platform's modular architecture to enable rapid enhancement in support of established and emerging demands. Various online marketplaces offer relatively low-cost, professionally designed themes with a high-quality look and feel that is modern and fully responsive.

WordPress is easy to use, accessible and intuitive for site management and content contribution. Simple content management and contribution functions require little or no training and promote rapid and widespread adoption.

Cautions

WordPress' development as a blogging platform has limited its growth as a portal platform, especially in areas requiring application aggregation and integration. The PHP language that WordPress relies on — although flexible — has limited adoption in the enterprise, and it has lost momentum outside the enterprise to languages such as Ruby, Python and Haskell. Some customers attempting to create differentiated customized experiences and applications find adequate development and integration skills hard to find.

As a platform, WordPress has had limited exposure to enterprises and only a basic accommodation for enterprise requirements involving security and integration. WordPress' potential as a horizontal portal platform requires the guidance of a broad ecosystem of enterprise-savvy partners in addition to Automattic.

Security and quality may be concerns for some organizations that maintain their own instance of WordPress. Although the core software is robust, third-party plug-ins required for some portal scenarios may be developed with less-than-rigorous methodologies. In addition, WordPress' enormous popularity attracts hackers, raising security concerns.

Vendors Added and Dropped

We review and adjust our inclusion criteria for Magic Quadrants and MarketScopes as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant or MarketScope may change over time. A vendor's appearance in a Magic Quadrant or MarketScope one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. 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 to this Magic Quadrant include Ektron, Jahia, Sitecore, Squiz and WordPress. Their inclusion reflects the trend toward convergence of portal and WCM demand. These vendors all meet the inclusion criteria from an offering perspective as well as in terms of customer awareness and use.

Dropped

Temenos did not meet Gartner's criteria for the 2014 horizontal portal Magic Quadrant primarily because its new revenue is derived almost entirely from a single industry — the financial services industry. The organization has experienced some recent traction that may allow it to re-emerge as a horizontal portal provider in the future.

eXo did not meet Gartner's criteria for the 2014 horizontal portal Magic Quadrant because it did not demonstrate applicability to B2C and B2B scenarios. During the past year, the company has repositioned its eXo Platform as the "Enterprise Social Platform" to acknowledge its focus on social intranet scenarios.

Inclusion and Exclusion Criteria

To be considered for the 2014 horizontal portal Magic Quadrant, the following criteria must be met:

The provider must serve the following basic portal functions and demonstrate the following characteristics:

Personalization: Personalization includes the ability to direct relevant content and information to individuals, groups and roles; change the content and behavior of page components, pages or page groups; and allow end users to customize their own experience. Personalization may be driven through a variety of static user-centric attributes, dynamic session-centric attributes, collaborative filtering or social relationships.

Security administration: Security administration includes the ability to manage access rights and privileges by individual, group or role. It also includes the ability to provide single sign-on for access to aggregated resources and services.

Integration and aggregation: Integration and aggregation includes the ability to integrate and aggregate a wide range of data sources, applications, content and services via various mechanisms, such as enterprise service bus, REST, RSS, XML Web services and iFrames.

Content management: Content management includes the ability to create, organize and publish a variety of content assets (such as text, images and rich media) in the context of the portal.

Search and navigation: Search and navigation allows end users and portal administrators to find and discover content and services available through the portal. This function also provides a means to create, manage and maintain navigation through static and dynamic mechanisms.

Workflow and business process management (BPM): Workflow and BPM allow organizations to build and manage process flows in the portal. The capability can be either built into the portal offering or integrated with external BPM tools or platforms.

Framework/componentry: This category includes a container or page framework and component model (that is, "portlets," "widgets" or a similar component model).

Mobile and multichannel: This category includes support for multichannel and multidevice delivery and presentation.

The vendor must demonstrate support for various portal scenarios. Vendors included must provide technology supporting portal deployment in a variety of scenarios, including employee-facing, customer-facing and partner-facing portals. They must have live customer references using their portal offering for a variety of scenarios.

The vendor must provide sales and support for the portal product in at least two of the following five geographic regions: North America; Latin America; Europe, the Middle East and Africa; Japan; and Asia/Pacific. The vendor also must have live customers in at least two of these regions.

The vendor must support clients in more than two industry verticals (for example, financial services, government, higher education, manufacturing and retail).

The vendor must have achieved one of the following revenue and market criteria:

At least \$6 million in annual portal-related product and service revenue as of 2013.

An installed base of at least 100 enterprise customers using the product as a horizontal portal.

Vendors must meet the revenue and or installed base criteria in portal installations as Gartner defines them. Vendors that offer platforms spanning various areas, including portals, content management and collaboration, must demonstrate sufficient revenue and installed base specifically supporting portal scenarios.

Evaluation Criteria

Ability to Execute

Enterprises evaluating horizontal portal technologies have wide-ranging requirements for different audiences. A breadth of functionality supporting different portal deployment scenarios, long-term vendor viability, a demonstrated track record of meeting customer needs and a successfully expanding market presence are all important criteria for the Ability to Execute in this market. A vendor that may not be rated highly in terms of its Ability to Execute in the general horizontal portal space may still provide compelling or leading-edge functionality supporting a particular portal deployment scenario or companies in a particular industry.

Product or Service: This criterion addresses the technology provider's core portal offerings. Assessments in this area focus on essential portal functionality, usability, scalability, manageability, security and ease of deployment.

Overall Viability: This criterion includes an assessment of the overall organization's financial health, the financial and practical success of the portal-related business unit, and the likelihood that the individual business unit will continue to invest in the product. Gartner also considers the vendors' likelihood of advancing the state of the art for portals in the organization's product portfolio. Assessments of the organization's cash and equity position, management, and financial strategy are weighed.

Sales Execution/Pricing: This criterion addresses the technology provider's capability in all presales activities and the structures that support them. It includes deal management, pricing and negotiation, presales support, and the overall effectiveness of the sales channel. Assessments of the quality of the technology providers' sales forces, their demonstrated market shares and their pricing strategies are included.

Market Responsiveness/Record: This criterion evaluates the vendor's ability to achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the provider's history of responsiveness or its track record in the portal space. It also weighs the range and level of success among enterprise customers using the portal offering.

Marketing Execution: This criterion addresses the clarity, quality, creativity and efficacy of programs designed to deliver the organization's message in order to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. Product revenue, organizational mind share, and the health of partner and alliance programs are considered.

Customer Experience: This criterion includes the vendor's relationships, products and services/programs that enable clients to be successful with the products evaluated. It includes the quality and accessibility of technical support and account support. It also includes the availability and quality of ancillary tools, customer support programs, user groups and service-level agreements.

Operations: This criterion considers the vendor's ability to meet its goals and commitments. Factors include the quality of the product management team, service and support organization, developer organization skill sets, and other vehicles that enable the organization to operate effectively on an ongoing basis.

Table 1. Ability to Execute Evaluation Criteria

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

Source: Gartner (October 2014)

Completeness of Vision

Vendors demonstrating an understanding of their customers' evolving needs, incorporating new customer demands into their product strategies and exhibiting technological innovation in their portal products exhibit Completeness of Vision in the horizontal portal market.

Market Understanding: This criterion addresses the provider's ability to understand buyers' needs and translate them into useful products and services. Vendors that show the highest degree of vision listen and respond to buyers' current demands, anticipate emerging needs, and respond with an understanding of the portal ecosystem and competitive landscape. This criterion includes the vendors' vision for the evolution of portal technology in light of business, consumer, social and technology trends.

Marketing Strategy: This criterion considers the vendor's ability to convey a clear, consistent and

differentiated message to customers, partners and internal staff, whether through Web initiatives, advertising, customer programs or positioning statements. An effective marketing strategy is crucial to ensuring the distinction between portal offerings and other approaches to both building and managing Web and mobile presence.

Sales Strategy: This criterion evaluates the vendor's ability to sell the offering via the optimal combination of direct and indirect sales, marketing, service, and communication affiliates. Channels should extend market reach, skills, expertise, technologies and services available to the customer base. In situations in which the vendor offers more than one portal product — or a portal product in addition to products offering alternative approaches to building Web presences — avoiding channel conflict is important.

Offering (Product) Strategy: This criterion addresses the provider's approach to product development and delivery. It emphasizes differentiation, functionality, methodology and feature set as they anticipate requirements for integration, standardization, collaboration, development environments, personalization, architecture and other factors. The vendor's effective employment of open source is a factor in this evaluation criterion.

Business Model: This criterion evaluates the logic and synergy of a technology provider's business proposition. The vendor's business model should be strategically aligned with the motivations and initiatives of enterprise portal customers.

Vertical/Industry Strategy: This criterion addresses the technology provider's strategy to direct resources, skills and offerings to meet the needs of various market segments and vertical industries.

Innovation: This criterion addresses direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes. In the horizontal portal space, innovation can involve architecture, interoperability and integration, composite applications, user experience, omnichannel interaction, cloud computing, social software, context awareness, and analytics.

Geographic Strategy: This criterion is the technology provider's strategy to direct resources, skills and offerings to meet the specific needs of locations outside the "home" or native geography, either directly or through partners, channels and subsidiaries, as appropriate for that region and market.

Table 2. Completeness of Vision Evaluation Criteria

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

Source: Gartner (October 2014)

Quadrant Descriptions

Leaders

Leaders in this Magic Quadrant have a full range of capabilities to support a variety of portal deployment scenarios, and they have demonstrated consistent product delivery in meeting customer needs for a substantial period of time. Leaders have delivered significant product innovation over the course of their pursuit of portal customers, and they have been successful in selling to new customers across industries. IBM, Liferay, Microsoft, Oracle and SAP demonstrate leadership in the horizontal portal space.

Challengers

Challengers in this Magic Quadrant demonstrate significant Ability to Execute, but they lack the degree of portal-specific vision, from a technology or a business perspective, demonstrated by market leaders. OpenText has a long heritage in the portal market via its acquisition of Vignette. While Sitecore typically targets the WCM market, customers are increasingly using it to support portal scenarios, and thus, Sitecore warrants consideration in the horizontal portal space.

Visionaries

Visionaries in this Magic Quadrant demonstrate a firm grasp of emerging customer needs and the potential impact of new technology. Covisint and salesforce.com are ahead of much of the market in providing cloud portal services. Backbase has focused effectively on providing a lean portal, while employing new mechanisms for interoperability and meeting the demand for better user experiences. Adobe brings together a broad array of complementary capability and an innovative vision for digital marketing, but it lacks some of the refinements that would make the offering more consistently

appropriate for horizontal portal scenarios.

Niche Players

Niche Players in this Magic Quadrant focus on a limited set of portal deployment scenarios, have a limited geographic presence outside their home markets and/or focus on a narrow set of industries. DNN and Drupal entered the Magic Quadrant in 2011 as open-source providers that typically start with a content management proposition; both have fundamental portal capabilities and are increasingly used in portal scenarios. United Planet entered the Magic Quadrant in the Niche Players quadrant in 2012. WordPress has established a presence in the portal market via its enormous popularity as a social blogging platform. Squiz and Ektron, both with roots in the WCM space, are considered with increasing frequency as portal providers for some customers. Jahia has recently emerged as a vendor providing packaged horizontal portal capability. The Red Hat JBoss Portal is well-established in the portal market, but its appeal is limited to organizations with a significant investment in the broader JBoss Middleware portfolio.

Context

Portals are personalized points of access to and interaction with relevant information, business processes and people. They bring value to three major audiences:

End users get unified access across previously siloed content via a consistent user interface and authorization mechanism.

Business organizations get a unified place to engage, support, learn from and respond to their customers and other audiences.

IT organizations enjoy an agile, scalable means to deliver Web applications; an environment to enable collaboration and a means to delegate responsibility to the business.

Market Overview

Trends in the Portal Sector

The portal market is evolving rapidly in response to several trends:

Portal and WCM demands converge.

The portal market trajectory points toward the UXP.

Developers and architects favor lean portals.

Customer service adds its influence to marketing for customer-facing portals.

Employee portals incorporate social technologies.

Portal and WCM Demands Converge

One of the most noticeable trends in the portal market, and in the Magic Quadrant that reflects it, is the inclusion of several vendors traditionally positioned in the WCM market.

During the course of the past decade, organizations have typically looked toward these software categories — horizontal portal platforms or WCM systems — as the primary software foundations for their websites. The categories have certain strengths: WCM centers on the process of creating content and editing, revising, approving, versioning and targeting, and deploying it. Portals tend to emphasize personalized access to information and applications that may exist in many places. For some organizations, WCM supports informational websites, while portals support transactional websites. Of course, many customer requirements include both portal and WCM capability. In the past, for most of them, this would likely have meant integrating two products from two vendors — and in most cases, dealing with the complexity of two platforms from two vendors trying to serve similar purposes.

Market consolidation and the formation of broader UXPs are changing this dynamic. Most of the large portal platform providers have built or acquired WCM capability and, with various levels of cohesiveness, are integrating it into their products. In addition, vendors with a heritage in WCM are increasingly adding portal-like capabilities, with richer mechanisms for integration, personalization and application delivery. Meanwhile, a few emerging providers don't distinguish between their portal and WCM capability — the portal platforms and WCM systems are rolled into one solution.

In this horizontal portal Magic Quadrant, several providers with a WCM heritage were included for two reasons:

Functionality has evolved to support dynamic content delivery, personalization, identity management, component frameworks and other capabilities that were formerly found only in portals.

Gartner received more client inquiries regarding these packages for portal use cases and in competition with established portal platforms.

The Portal Market Trajectory Points Toward the UXP

The current trajectory of portal and WCM offerings points toward an even more comprehensive platform. UXPs provide an integrated set of technologies that support the authoring, design process, management and delivery of rich experiences across Web channels and mobile platforms. UXPs appeal to organizations that want to equip themselves with all tools required to build and manage their variety of websites, portals and mobile applications (see "MarketScope for User Experience Platforms"). Beyond core portal, WCM and composite application capabilities, UXPs incorporate tools and capabilities, such as search, BPM, collaboration and social technologies, and Web analytics. Many customers are investing in portal platforms based on their UXP potential.

Developers and Architects Favor Lean Portals

Meanwhile, as a countertrend to the consolidation of WCM and portals and the emerging UXP, many developers and architects favor lean portals. That is, rather than using bulky, complicated platforms (some of which can be based on archaic technology and are bloated with underused features and bolted-on products), Web architects and developers look toward lightweight, low-cost and easy-to-deploy portals that offer just enough capability to suit essential portal requirements. These portals tend to be more supportive of heterogeneous environments, integrating rather than supplanting systems in adjacent categories. They also tend to take advantage of service-oriented architecture (SOA) principles, keeping the portal as a thin front end while leveraging business logic that lies elsewhere. While the trend has largely favored open-source vendors such as Liferay and Jahia, commercial vendors such as Backbase have also effectively exploited the lean portal opportunity.

Customer Service Adds Its Influence to Marketing for Customer-Facing Portals

Business leaders are becoming more influential as decision makers and users of portal technology. As enterprises increasingly treat the Web as vital to the business and a competitive differentiator, vendors are targeting both business leaders and business-minded IT leaders. Nowhere is this dynamic more pronounced than in customer-facing portal initiatives. Portal vendors are compelled to provide comprehensive "solutions," rather than a disconnected array of tools and platforms. The solutions are increasingly expected to support end-to-end processes and be readily usable for business personnel, rather than only IT administrators and developers.

While most vendors have expended their efforts on digital marketing, customer service is emerging as the greater challenge and opportunity for vendors with strong portal capability. Customer service and self-service initiatives require the portal's unique ability to integrate, aggregate, secure and contextualize content and applications that exist in many places. While marketing also has its challenges, content management platforms are in a better position to support situations in which content is relatively single-sourced and pushed to customers.

Employee Portals Incorporate Social Technologies

In many ways, just as portals and WCM converge on customer-facing initiatives, portals and social technologies are converging on employee-facing portals. Many companies are replacing or renovating their intranets. Almost invariably, they are planning to incorporate social technologies, whether to improve adoption or to foster communication and collaboration among employees. Their approaches range from the conservative, whereby companies add a few social capabilities to their intranets, to the aggressive, uprooting their existing portal-based intranet and replacing it with an enterprise social network (ESN). Portal vendors targeting B2E scenarios have acted accordingly. In some cases, these vendors are adding social capabilities, such as social profiles, activity streams, forums and blogs, into their existing portals. In other cases, they are offering distinct social platforms to accommodate the more aggressive social proponents. Some vendors, such as Microsoft and IBM, have done both.

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