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Magic Quadrant for Horizontal Portals

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Summary

Consumerization, convergence, continuously evolving technology and a shift toward business influence are changing the horizontal portal market profoundly. Leaders of portal and other digital experience initiatives face more complex and more consequential decisions.

Market Definition/Description

Gartner defines "portal" as a personalized point of access to relevant information, business processes and other people. Portals address various audiences, including employees, customers, partners and citizens, and support a wide range of vertical markets and business activities. As a product, a horizontal portal is a software application or service used to create and manage portals for a wide range of purposes.

The requirements of digital business are driving waves of innovation and drawing new vendors into the portal market. The evolved landscape is increasingly populated by vendors eschewing traditional portal standards and practices in favor of more flexible, leaner and lighter-weight technology. Vendors with roots in areas adjacent to the portal market, especially web content management (WCM), increasingly offer capability suitable for portal use cases.

Vendor revenue in the portal and digital engagement technologies market declined more than 5% between 2014 and 2015, when estimated revenue was at about \$1.64 billion. But Gartner expects a revenue resurgence as organizations see the need to expand and improve portal capabilities as an essential part of broader digital experience initiatives. As a result, Gartner expects the market for portal and digital engagement technologies to grow at a 2.83% compound annual growth rate (CAGR) between 2015 and 2016, then to rebound to a healthier growth rate of about 5% over the next five years (see "Forecast: Enterprise Software Markets Worldwide, 2013-2020, 3Q16 Update").

Magic Quadrant

Figure 1. Magic Quadrant for Horizontal Portals



Source: Gartner (October 2016)

Vendor Strengths and Cautions

Adobe

Adobe, based in San Jose, California, delivers horizontal portal functionality through its Adobe Experience Manager (AEM) offering, which offers digital asset management (DAM), mobile, communities, customer communications and industry-leading WCM capabilities. AEM is a key component of Adobe Marketing Cloud, a digital marketing platform.

STRENGTHS

AEM puts more power into the hands of digital marketers than most portal competitors. Beyond just managing content, digital marketers can easily create and manage web and mobile experiences while performing sophisticated functions such as content targeting and personalization.

Customers can draw on a very broad set of functions when AEM is tied to Adobe Marketing Cloud, especially Adobe Analytics, Adobe Campaign and Adobe Target, to create an outstanding portal platform for digital marketing purposes.

Customers value Adobe's understanding of their business and technical vision, as well as its ability to anticipate their requirements and provide a continuous flow of new functionality into AEM.

CAUTIONS

Adobe's strong focus on digital marketing, both from positioning and product development standpoints, may make it less appealing to organizations seeking portal platforms for other purposes.

Some clients with custom requirements report that AEM comes with little out-of-the-box functionality, and requires substantial engineering talent to get it up and running.

AEM's typically high initial costs often eliminate it from the consideration of customers with moderate portal requirements.

Backbase

Backbase, with headquarters in Amsterdam, The Netherlands and Atlanta, Georgia, offers the Customer Experience Platform (CXP), which supports portals, websites and mobile apps with features for customer service, customer self-service and digital marketing. Backbase has a strong installed base in the banking and financial services industry, but its CXP can and has been applied to initiatives serving various industries and audiences.

STRENGTHS

Backbase has consistently, aggressively and effectively anticipated and exploited emerging technologies and development trends. The vendor's adaptability is due in part to being unburdened by outmoded legacy architectures.

Customers benefit from Backbase's commitment to ensuring interoperability with a wide range of adjacent systems by adding functions on a consistent and continuous basis. Backbase often extends and contextualizes systems already seeing widespread use among its customers, such as its recent work with the Solr search platform built on Apache.

Backbase customers value CXP's lean and modern characteristics, which often result in a far faster time to market than most other portal offerings. A range of new cloud capabilities promises to accelerate Backbase's agile qualities.

CAUTIONS

Both existing and potential customers complain of a lack of ready-to-go widgets geared for industries and processes outside of banking and financial services.

The Backbase partner ecosystem is not as good as those of horizontal portal leaders, although the vendor is making gradual improvements.

Some Backbase customers report weak support and unexpected difficulty with product upgrades.

Drupal

Drupal is a PHP-based, open-source web platform that powers almost 2% of the world's websites, a substantial portion of which are portals. Drupal has proliferated largely outside of enterprise IT environments, but it is now gaining traction in government, media and entertainment, education, and retail sectors.

STRENGTHS

Drupal is one of the largest open-source projects in the world, ensuring a wide availability of development and implementation talent.

A large catalog of add-ons and themes is a key resource for enterprises that want to rely on off-the-shelf components to minimize custom development.

Drupal continues to boldly innovate and improve even in the core product, an approach that other open-source projects hesitate to take.

CAUTIONS

Drupal version 8 introduced significant changes to the platform, making updates especially challenging for existing clients. Gartner finds newer portals are still being built on version 7 to leverage the larger ecosystem of add-ons that have not yet been updated for the new release.

Drupal is primarily designed as a web content management system (CMS). Some portal capabilities, including aggregation and personalization of applications and third-party information sources, require more custom development than most horizontal portals.

The success of Drupal-based portals hinges on the effectiveness of implementation partners and hosting providers. The support costs of experienced partners can cut the savings expected from an open-source platform.

Episerver

Episerver, with headquarters in Nashua, New Hampshire and Stockholm, Sweden, launched the Digital Experience Cloud, which serves as its portal product, in 2015. All of its capabilities are offered as a platform as a service (PaaS) that resides on Microsoft Azure. It includes the Digital Experience Hub to enable interoperability with other systems.

STRENGTHS

Episerver has extended beyond rule-based personalization typical of a portal to analytics-driven personalization, with product development plans for smart-machine-based personalization recently accelerated through the acquisition of Peerius.

Episerver has introduced collaborative content development as an extended capability to content and site production, which is rarely seen in other portal offerings.

Portal developers appreciate the platform's modern architecture and strong support for .NET technologies.

CAUTIONS

Some Episerver customers warn against substantial customization of the platform when it is used as a portal, as it complicates future upgrades and can render some native capabilities unusable.

While Episerver is well-tuned for a range of push-oriented, customer-facing use cases, organizations that need a platform for more collaborative and community-centric employee and partner portals may find it lacking. Episerver hopes to address this issue with the release of Episerver Social later this year.

Episerver customers have highlighted the need for the vendor to further enhance and leverage the Digital Experience Hub (from the vendor's earlier merger with Ektron) as a significant priority.

Hippo

Hippo, with U.S. headquarters in Boston, Massachusetts, is a commercially supported open-source offering, based on Apache Jackrabbit. Hippo CMS is suited for both portal and content-centric initiatives. Its Enterprise Edition is bundled in an Enterprise Pack as well as an Experience Pack. The latter includes a Relevance Module for targeting and personalization.

STRENGTHS

Hippo tends to work well for midmarket and larger organizations that seek to differentiate through custom development.

The vendor emphasizes being part of a best-of-breed solution rather than a more monolithic "do everything" vendor. This is a suitable strategy for those organizations using a collection of open-source offerings.

Hippo has a modern architecture that can support both web content management and portal scenarios without the complexity of systems that are mashed together from multiple products.

CAUTIONS

Hippo's marketing is only just beginning to resonate with leaders of portal initiatives. Gartner customers typically have little or no awareness of Hippo as a potential portal provider.

Hippo customers report that the necessity of custom development and integration, along with a scarcity of required features or plug-ins, can cause deployment delays.

Customers that have a large number of named users with various access rights may see issues with performance.

IBM

IBM, headquartered in Armonk, New York, sells IBM WebSphere Portal, which is one of the original portal products. Over the years, WebSphere Portal has been deployed in a wide variety of use cases. It is part of IBM's Digital Experience strategy, which also includes web content management, social, mobile, collaboration and communications capabilities.

STRENGTHS

WebSphere Portal offers the rock-solid reliability and performance characteristics that IT demands, while steadily improving the ability for the business to build and manage user experiences.

Recent organization changes put the WebSphere Portal team under the auspices of IBM's digital commerce leadership, which should align WebSphere's positioning and development toward more business-driven, customer-facing use cases.

IBM is the first vendor to actively use smart machine capabilities in its portal solution, employing Watson services to enhance context awareness and relevancy.

CAUTIONS

WebSphere Portal is a sophisticated, premium-priced solution that can be costly to manage. Customers with relatively simple portal needs are less likely to garner value relative to cost than customers with complex requirements.

While the recent internal organization change for the WebSphere team may bode well for customer-facing use cases, there is a risk that it will detract from other use cases.

IBM has worked to improve ease of installation, end-user capabilities and developer productivity, but sophisticated WebSphere Portal use cases require increasingly hard-to-find enterprise Java expertise specific to portals.

Jahia

Jahia, based in Geneva, Switzerland, with North American headquarters in Washington, D.C., is relatively new to the horizontal portal market. Its product is Portal Factory, which is one part of its Digital Experience Management platform. Portal Factory can be used to deliver a range of solutions, with a focus on customer extranets and employee portals.

STRENGTHS

Portal Factory's three packaging options (CMO, CIO and CxO) offer deployment flexibility based on the business objectives of technology and business leaders.

Jahia has a unique pricing model based on solution, initiative, number of users and region, allowing enterprises to deploy in a more cost-effective manner than with traditional server-based pricing models.

A sharp focus on marketing features and integration with third-party marketing technologies make Portal Factory a compelling solution for digital marketing use cases.

CAUTIONS

Jahia's focus on customer-facing solutions may make it less compelling for other use cases.

Jahia is a small, early-stage vendor entering a mature market with much more financially established and resource-rich rivals. Organizations should assess the vendor's viability and resources to support their portal initiatives.

Jahia's partner-driven approach to growth and its Western-European-centricity may be a risk for Jahia customers in other regions. However, the vendor is broadening its global presence, especially in the U.S.

Kentico Software

Kentico Software, based in Brno, Czech Republic and with U.S. headquarters in Bedford, New Hampshire, offers a quartet of solutions aimed at web content management, e-commerce, online marketing, intranet and collaboration. The vendor emphasizes extensive out-of-the-box functionality and rich customization features targeted at the small or midsize business (SMB) market.

STRENGTHS

Kentico offers a comprehensive feature set that can compete with more expensive offerings from larger portal providers.

Kentico's broad set of capabilities is entirely developed in-house, not through acquisitions of other products. Unlike some other horizontal portal offerings, Kentico exhibits few overlaps in functionality and good integration between different parts of the solution.

Kentico's licensing model allows clients to pay only for the features they use and to grow into the product over time, without large upfront investments.

CAUTIONS

Kentico has been more reactive than innovative with its product support of portal initiatives. Kentico focuses primarily on WCM and offers little differentiation as a portal provider.

Kentico mainly targets and serves midmarket clients. Large enterprises requiring customized capabilities across a range of scenarios may not find it geared toward their purposes.

Market awareness of Kentico as a horizontal portal is low, even where Kentico is a very good fit.

Liferay

Liferay, based in Los Angeles, California, offers an open-source portal platform in two editions. The commercially supported Liferay Digital Experience Platform is available on a subscription basis, and is most often adopted by larger enterprises. Smaller organizations or those pursuing project-based portal initiatives often use the free, open-source Liferay Portal Community Edition.

STRENGTHS

Liferay is a persistent strong contender in the portal market, with solid performance in almost all aspects, making it a sturdy choice for enterprises that require a strategic vendor.

The Liferay platform has been developed entirely in-house, without having to graft on features or technologies acquired by buying other companies.

Liferay has a solid partnership program and developer community that ensure ample availability of implementation partners and Liferay developers.

CAUTIONS

As the portal market evolves, Liferay increasingly competes with vendors that have more experience in the WCM space. Liferay's WCM capability, while improving considerably, lags behind some of the market's leaders and innovators.

The open-source community edition of Liferay is seldom a practical alternative for clients, because the vendor's implementation partners are required to work only with the licensed version. In practice, the open-source edition is only an alternative for customers with strong, highly disciplined and skilled in-house teams.

Specialized auxiliary features, such as digital marketing capabilities, trail those of vendors longer-established in supporting digital marketing scenarios.

Microsoft

Microsoft, based in Redmond, Washington, locates its horizontal portal capability in SharePoint. SharePoint is available as an on-premises server application, currently SharePoint Server 2016, and as a subscription-based SaaS application, SharePoint Online, which is part of the cloud-based Office 365 for Business suite.

STRENGTHS

Widely deployed, SharePoint has offered relief for the many organizations that had been struggling with complex portal offerings geared toward IT elites.

Microsoft has consistently focused on facilitating adoption through packaging or integration with other Microsoft applications, low introductory pricing, and usability targeted to administrators and information workers.

SharePoint Server 2016 marks a shift toward a "cloud first" portal capability; it will increasingly use the code and architecture used to deliver the high performance and rapid innovation of SharePoint Online, rather than relying on legacy on-premises code.

CAUTIONS

SharePoint is not as readily equipped for high-end customer- and external-facing use cases as it is for intranet and digital workplace scenarios. Organizations that want SharePoint to support a variety of portals often require custom development, Microsoft partner expertise or complementary software.

Long-standing feature gaps remain in forms and workflow, enterprise administration, and governance. Customers often require third-party tools, enhancements or solutions built on top of SharePoint to account for these gaps.

Customers often characterize on-premises versions of SharePoint as rigid and troublesome to customize, and SharePoint Online is currently less customizable in some respects. Microsoft's attempts to address the problem in the course of the cloud transition have left some customers confused and wary about custom development and integration.

OpenText

OpenText, based in Waterloo, Ontario, Canada, has been shifting portal capability into its Web Experience Management (WEM) offering, creating an alternative to the original OpenText Portal. WEM targets customer support, self-service and intranet portals, and integrates with transactional systems such as SAP, with OpenText's Customer Experience Management platform and other OpenText solutions.

STRENGTHS

Adding portal capability to Web Experience Management is a good move in light of increasing customer demand for simpler, unified platforms that combine portal and WCM capabilities.

OpenText has a good track record of forging relationships and product integrations with other established enterprise vendors, including SAP, Microsoft and Oracle.

Customers have high regard for OpenText Portal's flexibility, scalability and ability to create customized portals without compromising the ability to upgrade and refine.

CAUTIONS

OpenText's 2016 acquisition of HPE's TeamSite WCM assets complicates an already complex portfolio that the vendor had only just begun to rationalize. Customers report concern about OpenText's ability to support multiple product lines.

OpenText's stand-alone portal market presence has declined as it shifts portal capabilities into other parts of the portfolio, including Web Experience Management. Some of its portal customers have turned to vendors that instill more confidence in future support for portal scenarios.

Customers express concern that OpenText is lagging behind rivals in innovation. Some are unaware of and consequently unable to avail themselves of advanced features of offerings. Usability suffers from lack of attention to user experience (UX), according to some customers.

Oracle

Oracle, based in Redwood City, California, is a veteran portal vendor, offering its established WebCenter Portal and WebCenter Sites. Recently, it has begun rapidly moving its portal focus and innovation to the cloud as part of its expanding Oracle Cloud Platform offerings, chief among them is Oracle Sites Cloud Service.

STRENGTHS

WebCenter Portal and WebCenter Sites are established portal solutions, with lineage dating back to the market's origins, and have been deployed in a wider variety of use cases than most other offerings.

Moving portal capabilities to the cloud is in alignment with Oracle's overall strategy, and will help deliver consistent management and integration between Oracle's portal offerings and the rest of the vendor's digital experience, middleware and business applications portfolios.

Oracle is successfully aligning its portal strategy to its overall Customer Experience (CX) strategy, solidifying its digital experience platform (DXP) and making it easier for Oracle customers to deliver a consistent and powerful customer experience.

CAUTIONS

Oracle's recent shift of portal strategy to the cloud has caused some customer confusion. There are differences between the cloud-based and on-premises portal offerings; integration strategies between them are unclear; and the operation of a hybrid (in-cloud plus on-premises) portal scenario remains hazy to many customers and prospects.

Oracle is a premium-priced solution, and the relative complexity of its on-premises offering often leads to higher-than-expected total cost of ownership (TCO) and the need for specialized skills.

Oracle's portal strategy is multiproduct (WebCenter Portal and WebCenter Sites, Oracle Sites Cloud Service, plus several other legacy products), which results in a confusing product portfolio with too many options for clients seeking a definitive portal platform for a range of initiatives.

Salesforce

Salesforce, based in San Francisco, California, has the Community Cloud portal product, which is built on the Salesforce1 Platform. The portal thus inherits a wide range of core capabilities (such as search, identity, workflow and API) and advanced features such as Chatter social collaboration. Salesforce complements the portal with its cloud development platform and numerous cloud-based business applications.

STRENGTHS

Community Cloud fully embraces all the advantages of a cloud architecture, such as rapid deployment of changes, improved security and high scalability, without having to balance feature parity with an on-premises solution.

Community Cloud enables business users to work on their own with Salesforce tools such as Lightning UI and Process Builder to create simple websites and apps.

Compared to rivals, Salesforce offers a very strong mobile capability for portals, bringing together responsive websites and mobile apps.

CAUTIONS

Community Cloud's portal capabilities often need to be augmented with other Salesforce products in a complex product catalog, leaving many customers confused about the true cost of running the portal.

Portals based on Community Cloud often need a large proportion of custom development to meet the requirements of various portal use cases.

Community Cloud lacks sufficient web content management for some portal use cases. Customers that need ample WCM often turn to third-party products to supplement Community Cloud.

SAP

SAP, headquartered in Walldorf, Germany, continues to offer its well-established SAP Enterprise Portal, currently in version 7.5. More recently, the SAP HCP Portal (formerly Hana Cloud Portal) is available as a portal PaaS for generic portal scenarios, or as a solution bundled with SAP's cloud applications, including SuccessFactors. SAP now links Fiori, its platform for simplifying and personalizing the SAP user experience, with HCP Portal via SAP Fiori, cloud edition; the portal can run Fiori-enabled apps even if they have an on-premises back end.

STRENGTHS

By linking Fiori and its underlying design philosophy with its cloud and on-premises portals, SAP is both remedying a long-held customer resentment about SAP's user experience and enabling much faster time to market.

SAP portal customers, whether using the on-premises or cloud solution, most often cite integration and interoperability of various SAP systems as the vendor's primary strength.

SAP's investments in HCP Portal and in SaaS applications such as SuccessFactors are creating a portal platform that is both "ready to go" as is and highly customizable. This is a powerful combination compared to many of its portal rivals.

CAUTIONS

SAP's portal offerings are relevant primarily to customers with substantial investment in SAP's business software. Organizations seeking unified access to applications, data and services from a wide array of providers may find other horizontal portal offerings more suited to their needs.

SAP's portal offerings lack the advanced content management capabilities required to support many use cases.

The slower cadence of innovation for the older, on-premises SAP Enterprise Portal has frustrated some customers and caused them to seek alternatives for employee-facing, content-centric and external-facing portals.

Sitecore

Sitecore, based in Copenhagen, Denmark and with U.S. offices in Sausalito, California, markets the Sitecore Experience Platform, currently at version 8.2. It can support a wide range of portal use cases, and offers management capabilities for content, digital assets and product information.

STRENGTHS

Sitecore Experience Platform integrates well with popular and vital information sources, such as Microsoft SharePoint, Microsoft Dynamics, Salesforce CRM, various ERP suites and Google Analytics.

Sitecore is developing new tools to add greater personalization and context awareness to the portal user experience.

Sitecore is among the most advanced providers of personalization and content-targeting capability, essential factors in portal engagement and differentiation.

CAUTIONS

Sitecore continues to focus its portal product mainly on customer-facing and marketing scenarios, and may lack appeal for customers with other types of portal initiatives.

Some customers that deployed Sitecore Experience Platform version 8 reported a problem-plagued release when it was made generally available. Version 8.1, released in October 2015, is generally regarded as stable, though the upgrade typically requires additional service costs.

Despite some improvement in Sitecore's training and certification programs, customers report inconsistent levels of success with implementation partners. Some suggest that Sitecore should also improve user training resources to get the most out of an aggressively changing platform.

Squiz

Squiz, based in Sydney, New South Wales, Australia, offers the Customer Experience Platform (previously Squiz Suite). It is positioned as an enterprise digital platform suited to web experience, digital workplace and portal initiatives. It has a proprietary open-source content management system at its core.

STRENGTHS

Squiz's recent deal with value-added reseller (VAR) Verint Systems adds an experienced partner that enhances sales, support and development across the three geographies of the Americas, EMEA and Asia/Pacific. This is a good step for future growth and market presence.

Squiz's internal services and software delivery team is responsive to customer requirements and has a strong focus on UX design.

Customers report that Squiz's Customer Experience Platform lets them leverage the benefits of open-source software while being assured that the vendor is keeping it secure.

CAUTIONS

Squiz is often excluded from evaluation or selection shortlists, despite having sufficient capability, because of the lack of market awareness as a portal vendor.

Some customers report that their Squiz deployment was complex in terms of setup and technology execution, with a high dependency on the vendor's professional service organization to resolve issues.

Some customers' and prospects' efforts have been hampered by uncertainty about Squiz's product vision and roadmap. Squiz is taking steps to address this concern.

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

The increased number of participants in the Magic Quadrant for Horizontal Portals, 2016 reflects market overlap and convergence, particularly at the intersection of horizontal portals and WCM. Hippo, Jahia and Kentico Software meet the inclusion criteria for the 2016 report.

Dropped

No vendors have been dropped from the Magic Quadrant for Horizontal Portals in 2016.

Inclusion and Exclusion Criteria

To be included in the 2016 Magic Quadrant for Horizontal Portals, vendors must meet the following criteria.

Product Requirements

The provider must offer one cohesive integrated product or service that serves the following portal functions and inherently demonstrates all of the following characteristics:

Personalization:

- Ability to direct relevant content and information to individuals, groups and roles

- Ability to adapt the content and behavior of page components, pages or page groups based on user attributes

- Ability to allow end users to customize their own experience

- Ability to drive personalization through a variety of static user-centric attributes, dynamic session-centric attributes, collaborative filtering or social relationships

Security administration:

- Ability to manage access rights and privileges by individual, group or role

- Ability to provide single sign-on for access to aggregated resources and services

Integration and aggregation:

- Ability to integrate and aggregate a wide range of data sources, applications, content and services via various mechanisms, such as an enterprise service bus, REST, RSS, XML web services and iFrames

- Integration and aggregation must not require loading data or content into a single data repository

- Ability to integrate with third-party resources, such as CRM systems, HR systems and directory services, to manage permissions and drive personalization

Content management:

Ability to create, organize and publish a variety of content assets (text, images, rich media) in the context of the portal

Ability to manage presentation through templates, themes and skins

Search and navigation:

Allow end users and portal administrators to find and discover content and services available through the portal

Provide means to create, manage and maintain navigation through static and dynamic mechanisms

Workflow and business process management:

Workflow or business process management (BPM) capability, either built-in or through native integration with external BPM tools or platforms

Framework/componentry:

A page framework, container and component model, using "portlets," "widgets," or a similar component model

Ability to manage permissions and interactivity among containers on a page

Mobile and multichannel:

Support for multichannel and multidevice delivery and presentation

Product integrity:

All of the above capabilities must be available in one cohesive product or integrated suite.

Any third-party, open-source or OEM technology required to meet these criteria must be offered as part of the integrated product, suite or solutions.

The primary vendor listed in this report must provide support for any third-party software required to serve the above-mentioned functions.

Business Requirements

The provider must offer the following attributes and services:

Demonstrated support for various portal scenarios:

Recent (in the past six months) live customers using the vendor's portal offering for at least two of the following:

Business-to-employee initiatives

Business-to-customer initiatives

Business-to-business initiatives

Recent (in the past six months) live customers using the portal offering to provide support for transactional processes, as well as for content and information-centric processes

Geographic coverage:

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 must have a substantial base of live customers in at least two of the above-mentioned regions.

Cross-industry coverage:

The vendor must support clients in at least two of the following vertical industries: manufacturing, government, retail, financial services, insurance, healthcare, consumer goods, education, energy and utilities, telecommunications, aerospace, transportation, life sciences, hospitality and travel, and real estate.

Revenue and market criteria (the vendor must have achieved both of the following):

At least \$6 million in annual portal-related license and subscription revenue as of calendar year 2015.

The revenue requirement includes licenses, subscription services and maintenance. It does not include professional services.

Revenue must be clearly attributable to software and cloud-based services suiting portal initiatives (as defined above), as distinguished from other types of web and digital initiatives.

In the case that the vendor offers one product that serves multiple purposes (for example, portal and WCM), Gartner will require evidence that at least \$6 million is attributable to initiatives that can be clearly defined as portals.

At least five new customers in the past six months.

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. The evaluation criteria for Ability to Execute are as follows:

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 vendor's 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

Evaluation Criteria	Weighting
Operations	Medium

Source: Gartner (October 2016)

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. The evaluation criteria for Completeness of Vision are as follows:

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 vendor's 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 where 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.

Evaluation Criteria

Weighting

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 2016)

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, SAP and Salesforce 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. While Sitecore and Episerver typically target the WCM market, customers increasingly use them to support portal scenarios. Drupal's enormous popularity on the web has made the open-source offering an imposing force in web initiatives of all sorts.

Visionaries

Visionaries in this Magic Quadrant demonstrate a firm grasp of emerging customer needs and the potential impact of new technology. Backbase has focused effectively on providing a lean portal, while employing new mechanisms for interoperability, addressing "mobile first" portal efforts and meeting the demand for better user experiences. Adobe brings together a broad array of complementary capabilities and an innovative vision for digital marketing, but it lacks some of the refinements that would strengthen the offering 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. OpenText has stopped aggressively promoting its Portal offering, except as an extension to its Customer Experience portfolio. The Portal offering is increasingly fused into this solution, and is therefore only applicable for customers with other investments in OpenText. Squiz's portal market presence is limited to certain vertical markets and geographic regions at this stage.

Context

This Magic Quadrant evaluates the group of portal vendors that meet Gartner's inclusion criteria for this market. It is intended as a tool to facilitate vendor and product selection decisions. Leaders of portal projects and initiatives should consider the various vendor evaluation criteria for both Ability to Execute and Completeness of Vision, and weigh the specific strengths and cautions of vendors in all four quadrants. Organizations should consider vendors in any of the four quadrants, depending on the vendor's alignment with their requirements and goals.

As this research makes clear, portals are part of a complex, extensive and interconnected software landscape. Portal vendors are responding to customer demand for systems that address digital business initiatives rather than just one-off tactical websites. Here are this report's key findings and recommendations:

Horizontal portal capability is critical to ensuring secure and contextual access and interaction across digital channels.

Providers of portal capability offer comprehensive suites and platforms that go beyond the strict portal definition, incorporating functionality such as content management, search, analytics and testing.

Web content management, more than ever before, is a critical capability for horizontal portals, especially as portal responsibility shifts from IT groups to business units.

Business leaders value rapid and measurable value in portal offerings.

Recommendations:

Exploit the full complement of portal capabilities, including personalization, context awareness and content management, to improve user engagement and satisfaction across digital channels.

Enable business units to build and manage their own portals.

Evaluate cloud-based portal services as well as portal applications that are designed for specific purposes as a way to speed time to market.

Link advances in portal capabilities and technologies to emerging Internet of Things (IoT) initiatives.

Market Overview

The primary catalyst for change in the horizontal portal market is the response to digital business transformation: the evolution of traditional portal into the digital experience platform. The DXP reflects a business-driven focus on improving customer, partner and employee experiences across digital and physical channels. Optimizing that experience will entail portals that are more comprehensive and more integrated than in the past. As a result, Gartner forecasts the market for portal and digital engagement technologies (which includes the emerging DXPs) will reverse its recent revenue declines and rebound to a growth rate of about 5% over the next five years.

Other key trends in the horizontal portals market:

Vendors are improving and expanding the core portal capabilities, which will become even more important in digital customer engagement.

Enterprise file synchronization and sharing (EFSS) is increasingly a key element in portal solutions to support mobility. Vendors also are forging ties to mobile application development platforms (MADPs).

Anticipate vendor innovations to link DXPs with the IoT. In this highly competitive arena, which is devoid of standards, look for vendors willing to engage with the organizations to craft scalable solutions.

Voice interfaces, chat bots and personal digital assistants are emerging as new channels to engage and interact with internal and external audiences.

Evaluation Criteria Definitions

Ability to Execute

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

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

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

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

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

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

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

Completeness of Vision

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

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

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

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

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

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

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

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



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