

# Magic Quadrant for Web Content Management

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**Analyst(s):** Mick MacComascaigh, Mark R. Gilbert, Jim Murphy, Gavin Tay

## VIEW SUMMARY

Enterprises strive for ever-greater business impact from their online presence, demanding more from Web content management than it has traditionally delivered. Here, we assess how well WCM vendors are responding, providing insights for buyers and those reviewing their existing applications.

## Market Definition/Description

**This document was revised on 14 August 2013. The document you are viewing is the corrected version. For more information, see the [Corrections page on gartner.com](#).**

Gartner defines Web content management (WCM) as the process of controlling the content to be consumed over one or more online channels through the use of specific management tools based on a core repository. These may be procured as commercial products, open-source tools or hosted service offerings. Product functionality goes beyond simply publishing Web pages to include:

- Content creation/authoring functions, such as templating, workflow and change management
- WCM repositories that contain content and/or metadata about content
- Library services, such as check-in/check-out, version control and security
- Content deployment functions that deliver prepackaged or on-demand content to Web servers
- A high degree of interoperability with adjacent technologies, such as CRM (in particular, with marketing resource management and multichannel campaign management), digital asset management (DAM) and Web analytics
- Real-time adaptation to visitor interactions through technologies such as delivery engines or enhanced frameworks for content delivery applications
- The ability to integrate well with delivery tiers such as e-commerce, social media and portal software (not a requirement but a capability that appeals to many clients)

Our definition of WCM excludes products such as portals and e-commerce engines, even though these technologies have overlapping functions in areas such as personalization, content management and content delivery (see "Magic Quadrant for Horizontal Portals" and "Magic Quadrant for E-Commerce").

Note 1 lists vendors not featured in this Magic Quadrant that may suit some clients.

## Magic Quadrant

**Figure 1.** Magic Quadrant for Web Content Management

### NOTE 1 VENDORS NOT IN THE MAGIC QUADRANT MAY SUIT SOME CLIENTS

Hundreds of WCM vendors and communities meet only a subset of the inclusion criteria for this Magic Quadrant, yet may prove a viable choice for clients with specific needs. Some of these vendors are listed here:

- Agile Contents**, [www.agilecontents.com](http://www.agilecontents.com), Barcelona, Spain. Agile Contents specializes in helping clients develop multimedia content.
- Agility**, [www.agilitycms.com](http://www.agilitycms.com), Toronto, Canada. Agility provides a cloud-based offering that is easy to use at a low entry price.
- Alkacon Software**, [www.alkacon.com](http://www.alkacon.com), Cologne, Germany. Alkacon provides its customers with support, training and consulting services for OpenCms.
- Atex**, [www.atex.com](http://www.atex.com), Reading, U.K. Atex has a long history in the newspaper, magazine, broadcast media and publishing sectors. Atex offers multiple products that can contribute to an OCO strategy, including its Java-based WCM product, Atex Polopoly.
- Bricolage**, [www.bricolagecms.org](http://www.bricolagecms.org). Bricolage offers an open-source CMS with workflow and permissions for creating, managing and publishing documents.
- Bridgelinedigital**, [www.bridgelinedigital.com](http://www.bridgelinedigital.com), Woburn, Massachusetts. Bridgelinedigital provides SaaS WCM capabilities through its flagship iAPPS framework and product suite, in addition to marketing, Web analytics and e-commerce functions.
- censhare**, [www.censhare.com](http://www.censhare.com), Munich, Germany. Censhare offers a range of products that tie into the concepts of online channel optimization including WCM, DAM, Web2Print and MDM for product data.
- Concrete CMS**, [www.concrete5.org](http://www.concrete5.org), Portland, Oregon. Concrete offers concrete5, a free open-source CMS written in PHP and MySQL.
- Conet Technologies**, [www.conet.de](http://www.conet.de), Hennef, Germany. Conet Media Suite is based on IBM Domino and caters to WCM, media asset management, data integration and portal integration.
- Contao**, [www.contao.org](http://www.contao.org), Wuppertal, Germany. Formally known as TYPolight, Contao CMS is an open-source offering based on the LAMP stack.
- Content Management**, [www.cm4all.com](http://www.cm4all.com), Cologne, Germany. Content Management's CM4all focuses on creating and managing websites for the Internet and mobile devices.
- contentXXL**, [www.contentxxl.com](http://www.contentxxl.com), Nürnberg, Germany. Founded in 2006, contentXXL offers a CMS based on .NET, both as SaaS and for on-premises deployments.
- CrownPeak**, [www.crownpeak.com](http://www.crownpeak.com), Los Angeles, California. CrownPeak has a SaaS WCM offering with a primary focus on public websites for marketing and e-business.
- deltatre**, [www.deltatre.com](http://www.deltatre.com), Turin, Italy. Deltatre is a niche provider of social and WCM capabilities, primarily for sports-related websites.
- DNN**, [www.dnnsoftware.com](http://www.dnnsoftware.com), San Mateo, California. DNN offers a framework for building websites and Web applications on Microsoft ASP.NET.
- dotCMS**, [dotcms.com](http://dotcms.com), Miami, Florida. dotCMS is a commercial open-source vendor that cites customer references in multiple vertical markets, including education, healthcare, life sciences, finance and manufacturing. Version 2.1.1 of its Java-based offering was released in August 2012.
- Dynamicweb Software**, [www.dynamicweb-cms.com](http://www.dynamicweb-cms.com), Viby J, Denmark. Dynamicweb offers products that focus on both WCM and e-commerce in addition to providing functionality for related activities for the role of marketer.
- EidosMedia**, [www.eidosmedia.com](http://www.eidosmedia.com), Milan, Italy. This media conglomerate offers the Methode Portal Server, a WCM system primarily for news and media companies.
- Elcom Technology**, [www.elcom.com.au](http://www.elcom.com.au), Sydney, Australia. Elcom offers the elcomCMS platform as its core product, together with applications based



on this platform, such as eCommerceManager.NET and GovernmentPortal.NET.

**Enonic**, [www.enonic.com](http://www.enonic.com), Oslo, Norway. Enonic has traditionally focused on the Norwegian market. In April 2011, it released the open-source community edition of the Java-based Enonic CMS as part of its internationalization and expansion strategy.

**Gecod**, [www.gecod.com](http://www.gecod.com), Bologna, Italy. With its YouserCMS, Gecod provides a content management solution that serves as a middleware layer for Web and mobile applications, and is used to enhance the customer experience.

**Hannon Hill**, [www.hannonhill.com](http://www.hannonhill.com), Atlanta, Georgia. Hannon Hill provides WCM solutions for enterprises in sectors such as higher education, government and technology, based on Cascade Server, its primary offering.

**Hippo**, [www.onehippo.org](http://www.onehippo.org), Amsterdam, the Netherlands. Hippo CMS is based on open-source technology, but Hippo also supports enterprise deployments. Hippo CMS provides WCM functions with personalization.

**Hyarchis**, [www.hyarchis.com](http://www.hyarchis.com), Eindhoven, the Netherlands. Hyarchis entered the WCM market through the acquisition of Waxtrapp in August 2012. Its WCM offering, now known as Hyarchis Waxtrapp, complements the company's other ECM-related components.

**Idea Futura**, [www.ideafutura.com](http://www.ideafutura.com), Bologna, Italy. Idea Futura's flagship offering is called FlexCMP and is based on PHP. The company targets mainly Italian customers and has clients in multiple vertical markets, such as government, education and e-commerce.

**Imperia**, [www.imperia.net](http://www.imperia.net), Cologne, Germany. Imperia is a wholly owned subsidiary of Pironet NDH. It targets mainly Germany, Austria and Switzerland. Its Java-based flagship product is in its ninth major release.

**Infopark**, [www.infopark.com](http://www.infopark.com), Berlin, Germany. Infopark seeks to differentiate its CMS Fiona product by its ease of use and speed of deployment.

**Ingeniux**, [www.ingeniux.com](http://www.ingeniux.com), Seattle, Washington. Ingeniux provides a CMS platform for managing websites, online media and team collaboration.

**Jadu**, [www.jadu.net](http://www.jadu.net), Leicester, U.K. Jadu's target audiences are primarily the public sector and higher education sectors in the U.K., but it also has customers in other vertical markets, such as retail. Its Jadu Universe suite of products includes components for CMS, forms and search.

**Jahia**, [www.jahia.com](http://www.jahia.com), Geneva, Switzerland. Jahia is a community-driven open-source development model delivering Web content integration software by combining enterprise WCM with document and portal management features.

**Jalios**, [www.jalios.com](http://www.jalios.com), Le Chesnay, France. In addition to WCM, Jalios has capabilities relating to document management and collaboration. Its software is available both as an on-premises version and as SaaS.

**Joomla**, [www.joomla.org](http://www.joomla.org), New York, New York. This is an open-source CMS for building websites, in addition to enterprise-class online applications.

**Kentico Software**, [www.kentico.com](http://www.kentico.com), Nashua, New Hampshire. Kentico CMS is based on .NET and offers capabilities for social networking, e-commerce, collaboration and online marketing, in addition to core WCM.

**Liferay**, [www.liferay.com](http://www.liferay.com), Los Angeles, California. Liferay is better known for a popular, open-source horizontal portal. However, the set of Web publishing capabilities it also offers has prompted interest in this platform from some organizations wanting help with their WCM needs.

**Limelight Networks**, [www.limelight.com](http://www.limelight.com), Tempe, Arizona. Limelight provides WCM as a SaaS-based offering in addition to its video and content delivery network (CDN) products.

**Litium**, [www.litium.se](http://www.litium.se), Stockholm, Sweden. Litium focuses on the Nordic and Chinese markets. It offers WCM, e-commerce and product content management capabilities.

**Magnolia International**, [www.magnolia-cms.com](http://www.magnolia-cms.com), Basel, Switzerland. Magnolia is an open-source CMS. Magnolia powers digital communications for customers ranging from governments to leading Fortune 500 enterprises in more than 100 countries.

**MarkLogic**, [www.marklogic.com](http://www.marklogic.com), San Carlos,

## Vendor Strengths and Cautions

### Acquia

**Acquia**, based in Burlington, Massachusetts, has rapidly emerged as a prominent business supporting the Drupal open-source content management system, and selling enterprise support and cloud-hosting offerings. Acquia also operates Drupal Gardens, a software as a service (SaaS) version of Drupal.

#### Strengths

Acquia has a good reputation among users for providing services for Drupal, one of the most popular large-scale open-source software (OSS) WCM platforms. Feedback is positive overall from multiple sources, including customers, partners and developers that have been working with Acquia.

Acquia's management team consists of some of the original lead developers of Drupal, as well as veterans of the WCM market. Acquia understands enterprise requirements and has maintained a strong relationship with the broader Drupal developer and user community. Acquia's success has helped broaden the appeal of Drupal among some target groups that would not otherwise have considered open-source WCM.

Acquia has a rare opportunity to help enterprises with their broader online channel strategy, as it has a social software offering (Acquia Commons) and a WCM offering. Many enterprises are struggling to conceive and implement a social media strategy, but Acquia can claim successes based on a social culture indigenous to both its community and its social offering, enabling it to provide unique guidance in this regard.

#### Cautions

Acquia has not taken a clear leadership role in the Drupal partner ecosystem. If it were to do so, it could use the insights it captures from providing services for many Drupal implementations to enhance the overall platform. Acquia's formal partner program needs strengthening through certification and training programs.

Some prospects in Europe and Asia/Pacific exclude Acquia from their shortlists because of its lack of presence in their region. This lack of presence has also caused some existing customers to replace Drupal with a commercial off-the-shelf alternative.

Some prospects are deterred by the inability of Acquia's partners to provide interoperability with adjacent technologies, such as CRM and marketing-oriented software, whether open source or not.

### Adobe

**Adobe**, which is based in San Jose, California, has effectively used its global reach; its influence among developers, designers and ad agencies; and a well-architected, versatile product to strengthen its

leadership position in the WCM market. Adobe CQ is now part of Adobe Experience Manager (AEM), which also includes digital asset management capability from Adobe's Scene 7 acquisition, along with facilities for managing social communities. AEM is part of Adobe Marketing Cloud, which also includes Adobe Analytics, Adobe Target, Adobe Social and Adobe Media Optimizer. AEM is also available for on-premises deployment. In July 2013, Adobe announced the acquisition of Neolane, a company based in France that is active in multiple marketing-related markets such as multichannel campaign management and integrated marketing management.

### Strengths

Intuitive, user-friendly, and attractive authoring and management interfaces substantiate Adobe's design prowess and provide a satisfying experience for marketers, content experts and end users. Adobe recognizes the importance of engaging every level of user.

Adobe has the most complete and cohesive strategy of all the WCM providers for supporting mobility. CQ's architecture ensures the integrity of a single authoritative content source to serve a broad range of established and new mobile delivery mechanisms and technologies, including device detection, mobile sites, mobile Web applications and hybrid mobile applications. The product includes numerous emulators for testing, previewing and editing content in context. Adobe also owns PhoneGap, which enables developers to create apps for mobile devices using HTML, Cascading Style Sheets (CSS) and JavaScript.

Adobe recognizes the importance of design and the ecosystem that supports it. Its offerings are geared toward supporting design methodologies and best practices such as user-centered design in the content management process.

### Cautions

Customers report that, while Adobe Experience Manager is attractive and intuitive from a usability standpoint, support for the whole marketing life cycle is not yet cohesive. Adobe has been innovative in its vision, especially in exploiting the creative aspects of the WCM ecosystem, but customers want more refinement.

Although Adobe Experience Manager is a versatile and well-architected platform for the many Java-centric organizations and ecosystems, customers with heavier investments in .NET might be better served by other WCM systems. Such customers include the many companies hoping to optimize and extend existing investments in Microsoft SharePoint. Although Adobe does offer its AEM SharePoint connector, prospects should consider such cross-technology architectures carefully, leverage the experience of reference customers of Adobe with similar requirements well, and carry out proofs of concept for more advanced integrations.

Adobe's heavy emphasis on digital marketing is leaving considerable cross-enterprise opportunities underserved. Organizations are hungry to improve WCM across customer service, B2B and business-to-employee (B2E) scenarios. Adobe's WCM strategy is narrowly focused, considering the company's size, scope and market influence. Although Adobe uses a broad interpretation of the term "digital marketing" to allow for such scenarios, feedback received by Gartner from the market suggests strongly that Adobe needs to increase the perceived relevance of its offering to a much broader array of use cases.

### Automatic

San Francisco-based [Automatic](#) is the primary vendor behind WordPress, a popular open-source blogging platform that has a broad range of WCM capabilities. It is a PHP-based platform, available under the GNU General Public License version 2 (or later). Automatic has matured its WCM offering and now markets WordPress.com VIP, which is targeted at enterprises.

### Strengths

Automatic's WordPress platform has gained a widespread user base, mainly due to its ease of use. It has also benefited from consumerization, with a growing number of customers who use the platform in their spare time also wanting to use it at work. As a result, WordPress has high rates of user adoption among its enterprise customers.

Automatic is on a very positive trajectory, given its as yet untapped potential in the WCM market, based on its reputation, software and platform. Its viability as a competitor in the coming years is likely to be high, as is its prowess as the provider of an influential platform in the broader context of online channel optimization (OCO; see Note 2).

Technologically, WordPress represents a solid choice. PHP is a popular platform, particularly among verticals such as higher education and media. Automatic also offers a high degree of interoperability, with more than 23,000 plug-ins, including modules for connecting to CRM, Web analytics, video and multiple social channels.

### Cautions

Automatic relies heavily on natural social networking to build its reputation and spread the message about developments within WordPress itself. This is typical for an emerging open-source community, but such an approach on its own will not be appropriate when trying to win larger deals and achieve a bigger footprint among larger enterprises.

At the time of writing this research, Automatic's website ([automatic.com](#)) was the least ambitious of all the vendors assessed for this Magic Quadrant, and associated websites (such as [vip.wordpress.com](#)) are prosaic and uninspiring. Organizations planning to replace their WCM system expect more from vendors, as they know that their next online solution needs to be complex to exact the full potential of their online presence. At the time of publication of this document, Automatic had made some improvements, but it needs to raise the bar even higher.

Automatic does not use the WordPress community as effectively as it could to bridge the gap between what is technologically available and what is required to help organizations drive a

California. MarkLogic provides tools for building WCM systems that can recombine granular content on the fly.

**NetReach Technologies**, [www.netreach.com](#), Ambler, Pennsylvania. Its cmScribe product aims to simplify website creation.

**North Plains (Vyre)**, [www.vyre.com](#), London, U.K. Vyre offers Unify, a content management platform based on Java Platform, Enterprise Edition.

**OmniUpdate**, [www.omniupdate.com](#), Camarillo, California. OU Campus is a Java-based WCM offering that is marketed mainly to higher education institutions.

**Orchard**, [orchardproject.net](#). Many members of the steering committee of the Orchard project are based in Redmond, Washington. The project's primary aim is to provide open-source CMS solutions based on .NET.

**PaperThin**, [www.paperthin.com](#), Quincy, Massachusetts. PaperThin mainly targets the midmarket with CommonSpot, its flagship product, which is based on ColdFusion. It is also available as a cloud offering.

**Percussion Software**, [www.percussion.com](#), Woburn, Massachusetts. CM System, Percussion's flagship, is a Java-based product. It is augmented by CM1, a product aimed at nontechnical users but that allows organizations to use their existing applications via integration.

**Plone Foundation**, [plone.org](#). Plone is an open-source platform that emphasizes ease of use and extensibility.

**pTools**, [www.ptools.com](#), Dublin, Ireland. The company has refocused to provide its offering primarily as a cloud-based service. In addition to WCM, pTools offers services for workflow, document management, form capture and learning content management.

**Roxen Internet Software**, [www.roxen.com](#), Stockholm, Sweden. Roxen CMS emphasizes ease of use, integration with data sources and group collaboration.

**RSI Content Solutions**, [www.reallysi.com](#), Audubon, Pennsylvania. The RSuite CMS is built on MarkLogic Server and targets mainly the media industry to support multichannel publishing solutions.

**salesforce.com**, [www.salesforce.com](#), San Francisco, California. Already well-known for cloud-based CRM, salesforce.com offers Site.com to design and publish websites, social pages, and mobile experiences.

**SAP**, [www.sap.com](#), Walldorf, Germany. SAP provides WCM capabilities as part of its NetWeaver offering, but not as a stand-alone offering.

**Seneca**, [www.seneca.nl](#), Delft, the Netherlands. Seneca's flagship product, Smartsite iXperion, is based on .NET.

**Silverpeas**, [www.silverpeas.com](#), Grenoble, France. Silverpeas is seen mainly as a Java-based, open-source collaborative portal, but the platform also has a set of WCM capabilities.

**site-supply**, [www.site-supply.nl](#), Arnhem, the Netherlands. This vendor offers SaaS-based CMS together with a variety of add-on modules and related services. It targets domestic small or midsize businesses (SMBs).

**Systems Alliance**, [www.systemsalliance.com](#), Hunt Valley, Maryland. This vendor focuses primarily on SMBs with its flagship product, SiteExecutive.

**Telerik**, [www.telerik.com](#), Sofia, Bulgaria. Telerik's flagship product is Sitefinity, a .NET-based offering. Telerik, which has achieved steady growth in recent years, has offices in the U.S., Australia and India, in addition to Europe. It has reference customers in multiple vertical markets.

**Terminalfour**, [www.terminalfour.com](#), Dublin, Ireland. This vendor's Site Manager product has gathered notable references in the government and higher education sectors.

**Typo3 Association**, [typo3.org](#), Baar, Switzerland. Typo3 provides an offering based on PHP. Its clients are mainly in Europe.

**Vizrt**, [www.vizrt.com](#), Bergen, Norway. Known mainly for its Escenic Content Engine, Vizrt provides strategic content management software primarily for digital media publishing.

**Zope**, [www.zope.com](#), Fredericksburg, Virginia. Zope provides WCM primarily for media companies.

sophisticated, powerful and effective online strategy. Automattic focuses mainly on technological audiences, but its technology lags behind that of the leaders in this market. WordPress is popular with media companies, but while it does have some templates tailored to the specific requirements of individual industries, its messaging and solutions are not as sufficiently contextualized as its competitors to show how it can help meet the goals of different industries.

## NOTE 2 DEFINITION OF ONLINE CHANNEL OPTIMIZATION

Online channel optimization (OCO) is the discipline of maximizing the impact of engagement with target personas achieved over a variety of online communications media. The phrase "online channel" refers to a channel of "communication" and is a collective term that includes emails, IPTV, multiple websites, portals, and various social media, search, and mobile applications.

Strategies based on OCO have manifested themselves in a variety of forms, including strategies concerning digital marketing, customer experience management and user experience (UX) optimization.

## 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

## CoreMedia

CoreMedia has its headquarters in Hamburg, Germany, with additional offices in the U.S. and Singapore. Its flagship content management system (CMS) is in its seventh major release and emphasizes online customer engagement.

### Strengths

CoreMedia has made steady progress in the past few years in improving the usability of its software. This, coupled with its solid architecture and design, ranks it as one of the highest in the market in terms of product quality.

CoreMedia continues to market itself well, ensuring that its messages are tailored effectively to different target groups. It provides inspiring thought leadership and vision for prospects and customers, and thorough guidance about its product's capabilities.

CoreMedia has done well to broaden its ecosystem. It has secured a high-profile partnership with SAP to augment established partnerships, such as that with Deutsche Telekom. Its suite of capabilities now caters more effectively to social, mobile and cloud trends, which are topics of great interest in the current market.

### Cautions

CoreMedia has been struggling to grow beyond Europe. Despite some initial success in North America, it has not done as well there as some other European competitors. This could hinder CoreMedia's ability to gain traction in Asia/Pacific, the next region on which successful business development will depend and where some of its competitors are already gaining a strong foothold.

Although CoreMedia's overall prospects are good and its potential high in this steadily growing market, it has not demonstrated consistent year-over-year growth and profitability.

CoreMedia appears on few shortlists that Gartner clients — based in Europe and North America — share with us during calls, even where CoreMedia CMS would be a very good fit. This is mainly the result of weaknesses in CoreMedia's overall marketing strategy and sales execution. The company has a good marketing message and offers what the market wants, but its market presence is still slight.

## e-Spirit

Wholly owned by Adesso, e-Spirit is based in Dortmund, Germany. In the past year, it has opened an office in Boston. FirstSpirit CMS is e-Spirit's flagship product, a Java-based WCM offering now in its fifth major release.

### Strengths

The company works well with other Web foundations. As a result, e-Spirit is attractive to customers looking for WCM to complement an established portal or e-commerce foundation, or to those dealing with multiple established portals or e-commerce platforms. Its positioning as a "neutral" WCM provider that works across multiple platforms (such as those from IBM, Microsoft, Liferay and SAP) has been very effective. In the past year, e-Spirit has targeted IBM WebSphere implementations, where its ease of use and e-commerce capabilities have helped it gain traction.

This vendor has done well as an emerging player in a market where demand for best-of-breed, enterprise-class Java WCM offerings has been growing, but supply has been shrinking.

The introduction of its AppCenter has increased the usability of e-Spirit's product, particularly for business users and non-IT professionals. This module enables smooth interoperability with other technologies and content sources without the traditional need for long software development life cycles. This will attract customers wanting to enrich the experiences they deliver via online channels with a broader variety of content and functions.

### Cautions

The company still has a limited North American presence. It has made some progress in the U.S. in the past year, but unless e-Spirit continues to increase its customer base in North America, it will be unable to grow as fast as the overall WCM market.

The company has not built a strong enough partner ecosystem to accelerate its adoption. Customers expect more and deeper partnerships with, for example, digital agencies and e-commerce system integrators.

It has improved its overall marketing message, but e-Spirit still focuses too much on technology when a growing number of decision makers are outside IT and an increasing portion of the budget for new WCM systems is being held or influenced by marketing. Although e-Spirit is beginning to focus on marketing-centric needs for OCO, it must continue targeting such business contexts.

## Ektron

Ektron, based in Nashua, New Hampshire, offers a .NET WCM platform. The latest version, Ektron 9, was released in July 2013 and focuses on mobile interactivity, enhanced usability for both the author and developer, and integration with its Digital Experience Hub. Ektron provides products for marketing optimization, analytics, e-commerce and social media.

### Strengths

Ektron is delivering on a solid vision of the future of WCM by building tools that aid both the webmaster and developer, while also serving the needs of the digital marketer. It uses WCM as a core component of broader OCO offerings.

Ektron now also attracts larger enterprises, particularly in North America, in addition to its original focus of midsize companies, government agencies and the educational market. As a result, its installed base is increasing and its brand strengthening, based on organic growth. It has a strong partner ecosystem, including Adobe Analytics, Webtrends and Google for site analytics; Marketo for marketing automation; and salesforce.com for CRM.

Ektron's overarching product line is beginning to meet market needs for multichannel Web experiences, using HTML5/CSS3 support for multiplatform interaction. It is sometimes used to integrate and extend SharePoint's WCM capabilities, taking advantage of its .NET architecture.

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.

### Cautions

Ektron has lost some ground it had previously gained because of ongoing efforts to build stronger management and align the company for faster growth.

Gartner has received reports from Ektron's customers about support and deployment issues. Ektron has invested in support and deployment services to address this. Improvements have been made, but the changes are still working their way through the marketplace.

Ektron's larger customers tend to be multinational, but Ektron needs to scale more aggressively worldwide — particularly in EMEA — to fully meet their needs. These actions should address globalization, localization and multilingual needs, and service and support requirements.

### EPIserver

EPIserver's flagship CMS offering, EPIserver 7.1 CMS, is based on .NET. [EPIserver](#), based in Stockholm, Sweden, continues to add marketing and sales functions to its WCM product that is used by its related social software and e-commerce products. The company also offers managed Web operations and SaaS search technology, which have been successful for its customers. EPIserver also offers a degree of contextual content delivery across its core products.

### Strengths

EPIserver operates in all regions. It has a strong presence in the Nordic countries, plus growth in the U.K., other parts of Western Europe, North America and Asia/Pacific. It aims to further increase the proportion of its revenue derived from these areas, and from its distributors and implementation partner ecosystem.

EPIserver is popular in the midmarket, but has long established itself as an enterprise-class vendor and has been making deeper inroads into the retail, media and not-for-profit sectors in the past year. EPIserver is focusing on vertical markets with its implementation partners and third-party technology providers, and now includes, for example, retail templates and technology integration augmented by industry case studies.

EPIserver offers a set of rich functional capabilities that are among the best available, and business users like its intuitive graphical user interface. Its modular architecture has enabled it to build on its offering through its partnerships with Silverpop (marketing automation and Web engagement), inRiver (product information management across digital and print), Marketo (also used by many of its competitors), celum (digital asset management), SiteAttention (real-time advice on content optimization), and a Google Analytics add-on that provides analytic insight during content creation.

### Cautions

EPIserver has increased its regional coverage to provide a direct sales channel for larger customers in North America and with partners in Asia/Pacific, but it has not gained as much traction as its close competitors. Although EPIserver's channel alliance has grown, this approach still leads to early exclusion from selection processes, as its more technology-oriented partners are not as adept at helping companies build an overall OCO strategy and explaining how EPIserver supports that strategy.

EPIserver Find, the company's SaaS offering, can handle big data through a .NET API to a cloud service. While this offering is used for data-driven applications (such as search-based navigation and behavioral contextualization), it could potentially be viewed as unnecessarily complex.

In conversations with Gartner, EPIserver customers continue to question the completeness of EPIserver's modules for e-commerce, social software and marketing in its "suite" approach. EPIserver developed or gained these capabilities through acquisitions, and offers the value of a preintegrated solution. While the company continues to integrate and evolve these additional modules, customers requiring best-of-breed feature sets should carefully evaluate these offerings or consider integrating other components into their ecosystem.

### eZ Systems

Based in Skien, Norway, [eZ Systems](#) offers a WCM platform on a commercial open-source basis and as SaaS. It has rebranded its flagship eZ Publish product as eZ Publish Platform 5.1, which is based on the Linux, Apache, MySQL and PHP (LAMP) stack.

### Strengths

The company's rebranded eZ Publish Platform is a holistic portfolio of capabilities for managing the full life cycle of digital presences. These include creation, delivery and optimization capabilities. The company successfully promotes its capabilities for continuous optimization. Such capabilities are in great demand as organizations acquire solutions for their OCO strategies. The company also offers a high degree of interoperability through REST interfaces with third-party technologies that

support, for example, CRM.

The company has a thorough knowledge of the WCM market for enterprises, whereas OSS providers typically have only a bottom-up understanding. Its commercially supported open-source model enables customers to save on license fees. The company also manages code quality, updates and patches effectively, and is progressive in its overall strategy, providing a set of orchestrated functions that customers expect.

This vendor has successfully embraced the open-source culture, but does not rely heavily on it. Most WCM vendors already provide an equivalent offering in the cloud or as SaaS, but eZ Systems has taken it one step further by enabling its customers to back up and instantly roll back their on-premises deployments via a fully managed cloud-based solution, eZ Publish Cloud.

#### Cautions

eZ Systems has built a good vision in recent years that is consistent with market direction and potential. However, it has been slow to execute on this vision and has therefore lost ground in the face of traction and progress that some of its competitors have achieved in the same period. eZ Systems is now under new leadership, with the company's ex-CEO and co-founder returning as CEO in April 2013. It remains to be seen whether this change will affect its fortunes.

The company has not progressed as expected, despite being one of only a few European vendors to venture into Asia/Pacific (China and Japan), and having expanded its vertical markets. It has not invested enough in marketing to improve its brand recognition and sales execution, especially in North America. It remains relatively unknown outside the publishing and telecom industries, and it rarely appears on "longlists" and shortlists seen by Gartner.

The company's strong publishing orientation — evident, for example, in the product name eZ Publish Platform — won't instantly appeal to every organization. Although the Web has made every company a publishing company, eZ Systems' marketing needs to be more effective in promoting the relevance of eZ Systems to firms in industries other than publishing, such as manufacturing and retail.

#### GX Software

Based in Nijmegen, the Netherlands, [GX Software](#) offers two Java-based products: WebManager, a WCM offering, and BlueConic, a product designed to increase engagement across multiple online channels. Version 10 of WebManager was released in 2013 and is called XperienCentral.

#### Strengths

GX Software maintains a clear and strong vision of how its WCM offering should develop, both within the confines of the WCM market and in the broader solution ecosystem required for OCO.

GX has underpinned this vision with its emphasis on analytics capabilities and with key strategic partnerships, such with Pitney Bowes. GX has consistently executed its vision with its marketing and sales activities. This holistic coherence will help prospects identify whether XperienCentral is an appropriate fit for them.

In the past two years, GX has significantly improved the UI of WebManager and BlueConic. For example, it has used drag-and-drop capabilities more. In XperienCentral, it has made it easier for business users to perform persona management, and has introduced the ability to preview contextualized experiences from the perspective of those different personas.

#### Cautions

GX's traction in North America is modest at best. This is likely to threaten its ability to keep up with market growth, and could mean that it loses key enterprise opportunities and credibility, particularly as North America accounted for nearly 60% of the WCM market in 2012.

GX continues to build its partner ecosystem at a slower rate than some of its key competitors, and more slowly than required to secure scalable growth in this market. It does not always engage the right types of partners at different phases of the solution life cycle.

GX relies too heavily on direct sales in order to service prospects and drive success at the level of sales execution. This could be an issue — particularly for North American prospects — in terms of the support GX can offer both presale and postsale.

#### HP

[HP](#), which is based in Palo Alto, California, entered the WCM market in 2011 through its acquisition of Autonomy, which itself entered the market by buying Interwoven in 2009. Autonomy has enhanced its technology and provided additional capabilities via integration with its search and analytics platform. Autonomy has earned a strong position through its early focus on specific business scenarios (such as interactive marketing) and its provision of enterprise-class technologies to improve usability.

#### Strengths

HP's greatest strength in the WCM market is its combination of individual offerings that together can be very compelling.

As a major vendor, it has extensive channels, a strong partner ecosystem and global support.

HP is developing its WCM offering in a way that meets current and emerging needs.

TeamSite/LiveSite have capabilities that warrant their inclusion in at least the longlists of existing HP enterprise customers that are considering devising a digital strategy. Existing users of older versions of these products may want to inquire about HP's road map for these products, with a view to upgrading.

#### Cautions

HP's overall vision for and around WCM is still a work in progress, and seems to have advanced little in the past year. While specific groups within HP show great insight into WCM and its direction, HP lacks an all-embracing story articulated at the highest levels of management that is consistently reinforced and aggressively propagated. HP has done well to highlight a message of a "return on information" for its information management products overall, but its vision for WCM is not sufficiently incisive, compelling and relevant to buying influences.

HP has traditionally had excellent access to IT departments, but it is making less progress than some of its competitors in appealing to marketing organizations. Although it has done well with Promote and now Marketing Performance Suite, which is aimed at chief marketing officers (CMOs), it still has more work to do in targeting CMOs and chief digital officers with respect to WCM. As a result, HP's perceived relevance in the WCM market has fallen, and many prospects have excluded it from longlists and shortlists, which are determined mainly by marketers.

Uncertainty about HP's commitment to this market has hurt HP's sales execution and prevented its inclusion in some longlists and shortlists. HP still has a high retention rate, but Gartner has seen defections in the market. HP has not mounted an effective campaign of outreach and reassurance to existing customers, used cross-selling sufficiently well in its installed base, or provided good-enough thought leadership in areas where it is particularly under attack.

## IBM

IBM, based in Armonk, New York, intends for its Web Content Manager 8.0 to extend IBM's influence from large-enterprise IT to marketing executives and other influential business roles. Although IBM continues to offer Web Content Manager as a stand-alone product, the product is often acquired as part of a much broader solution. IBM's Customer Experience Suite combines WCM with WebSphere Portal and employs an array of related products covering e-commerce, mobility, search, forms, analytics and social features.

### Strengths

IBM appeals to different types of customers because of its attributes as a megavendor. Organizations and industries requiring a very broad, hard-to-predict array of Web, portal, e-commerce, content management, search, analytics and collaboration capabilities tend to benefit most from IBM Web Content Manager as part of IBM's vast product and services portfolio. Organizations with many B2E, business-to-customer and B2B efforts tend to benefit from IBM as a one-stop shop.

Like some of its high-end competitors, IBM targets its WCM offering mainly at digital marketers. However, unlike others, it also caters to IT and other business needs. IBM addresses internal WCM needs with its Smarter Workforce solution.

IBM's offering is flexible to suit the needs of customers. IBM Web Content Manager works with WebSphere Portal and is commonly shipped with a full portal license. The less frequently used stand-alone WCM offering still employs the portal, delivering capabilities through WebSphere portlets, but is limited to basic WCM functions. This arrangement can be beneficial to organizations that require WCM in the context of a wider range of portal needs, such as those requiring transactional capability, granular rule-based personalization, and a versatile framework for integrating other applications and services.

### Cautions

While IBM has focused on addressing usability in its 8.0 version of Web Content Manager, customers continue to complain about the complexity of various tasks, particularly in comparison to some competing products. These include fundamental tasks such as content authoring, as well as more advanced tasks like building workflows, managing templates and creating landing pages.

Potential Web Content Manager customers should be aware that the product works best in combination with WebSphere Portal Server. While many customers may benefit from the combined portal and WCM capabilities, customers employing portal platforms from competing vendors may encounter conflicts. In addition, some customers report that IBM Web Content Manager's dependence on WebSphere Portal increases the former's hardware and infrastructure costs relative to those of competing products.

In Gartner's experience, IBM rarely wins WCM deals on the merits of its WCM capabilities and qualities alone. Its successes are often the result of bundling its WCM product with other capabilities and the resulting cost savings. While IBM is a Challenger in the WCM Magic Quadrant, its attraction is based primarily on the breadth of the company's acquired offerings and its viability, rather than innovation within the WCM product alone.

## Microsoft

Microsoft, based in Redmond, Washington, has again stimulated interest in its WCM capabilities with the launch of SharePoint 2013. The presence of SharePoint in a pronounced majority of the Gartner client base reflects the wide adoption of this technology to support internal content management and collaboration. Microsoft also markets SharePoint Online as a component of its Office 365 suite, mainly for midsize enterprises with very basic site publishing needs. SharePoint Online is a cloud-based offering for email, collaboration and basic content management. Users with WCM and publishing needs will find the Enterprise Client Access License of the premises-based SharePoint 2013 the most suitable of the licenses available.

### Strengths

Microsoft has made some improvements in WCM in 2013, such as increased use of Fast search technology. It has also enhanced mobile and tablet rendering, aided by the use of "device channels" introduced in 2013.

With the 2013 on-premises release of SharePoint, Microsoft has begun to address the growing

demand for enabling responsive Web design approaches and stronger user experience management.

SharePoint continues to offer a mix of content management, search, portal, collaboration, social software, business intelligence and composite application features. This combination appeals to companies looking for a general-purpose workplace tool.

### Cautions

Although personalization and content-targeting features are often requirements for external websites, Microsoft is late in addressing these requirements relative to the market. Users should, therefore, seek references from Microsoft for use cases similar to their needs.

Many organizations have to supplement SharePoint with more capable WCM tools to enable marketers and designers to create dynamic user experiences across the full range of devices.

The WCM capabilities in the cloud environment of SharePoint Online are very basic and not suitable for many enterprise use cases.

### OpenText

[OpenText](#), based in Waterloo, Canada, offers an enterprise WCM offering, Web Experience Management (WEM), that is derived from its 2009 acquisition of Vignette. WEM is part of a comprehensive suite known as Customer Experience Management, which includes the Customer Communications Management, Media Management, Social Communities, Portal and Mobile Web products. OpenText also offers Web Site Management (WSM), a second, separate WCM product derived from its 2006 acquisition of Hummingbird (which had acquired WCM vendor RedDot Solutions).

### Strengths

WEM uses its component-based architecture to enable highly granular content personalization and targeting that works across channels. Content managers can build rules on a per-component basis, not just a per-page basis. They can build rules that are based on profiles and other data in a wide variety of internal or external sources, and then drive specific content, display templates, and view experiences in different languages and on different devices. The system allows content managers to test and view content via defined personas.

The latest version of WEM has significant interface improvements over earlier versions, employing HTML5 and balancing the convenience of in-line editing with the integrity of component content management.

OpenText's partnership strategy — both within the WCM product line and overall — is well-devised to augment capabilities and complement, rather than conflict with, established enterprise vendors. Partnerships with organizations such as Monetate for A/B and multivariate testing and with Elastic Path Software for e-commerce offer WEM customers clear, well-integrated choices to suit their OCO needs. Relationships with SAP, Microsoft and Oracle help ensure OpenText's alignment and integration with enterprise systems of record.

### Cautions

Gartner observes that OpenText has lost some of its momentum in the WCM market. WEM and WSM have appeared on fewer of the shortlists of Gartner clients looking for new WCM solutions than in previous years. Several larger competitors have more effectively promoted their WCM offerings, while smaller ones have benefited from a modern look and feel and an appeal to digital marketers from the outset.

OpenText's dual WCM product strategy confuses many customers and prospects. In addition, it provides no smooth transition for customers wanting to extend their midmarket tactical Web presence (using WSM) toward a high-end global marketing presence (using WEM). A gradual consolidation of the strategy to promote and advance just a single platform would help reduce customer confusion and improve OpenText's agility in responding to the next wave of market demand.

OpenText's high-level positioning around enterprise information management (EIM) indicates a direction that is misaligned with WEM. While enterprise content management (ECM), the market with which OpenText has been traditionally associated, may not adequately describe all of OpenText's capabilities, EIM describes far more than OpenText does. For example, EIM evokes data warehousing, business intelligence and master data management. Moreover, EIM fails to resonate with WCM initiatives aimed at improving business by extending reach and customer engagement. WEM is a promising product offering and a worthwhile initiative for OpenText, but fundamental misalignment with the larger OpenText entity could dilute its future impact on the WCM market.

### Oracle

Oracle WebCenter Sites is the company's strategic WCM product, derived from its 2011 acquisition of FatWire Software. [Oracle](#), based in Redwood Shores, California, positions WebCenter Sites for contexts centered on digital marketing efforts. The WebCenter brand encompasses WebCenter Content, WebCenter Portal and WebCenter Social. Oracle also offers some WCM capability through Site Studio, part of its WebCenter Content ECM suite. Oracle recommends Site Studio for publishing from ECM to custom Web applications.

### Strengths

Oracle WebCenter Sites has a long and solid track record in serving large enterprises and sophisticated websites. Before it was bought by Oracle, FatWire responded to the shift in WCM influence from IT to business decision makers, particularly marketing organizations. The product remains technically and architecturally sound and high-performing, with demonstrated ability to interoperate with portals, e-commerce systems, product information management and other



content systems.

Oracle has a deep market understanding and accompanying vision. For example, by employing productized integration with Oracle Real-Time Decisions, Oracle WebCenter Sites can begin to automate the complicated, manual tasks of sifting through analytics data to identify customer segments, delivering appealing or relevant content, and continually analyzing results. Oracle's other acquired assets, including Oracle Commerce (ATG and Endeca) and Oracle Eloqua (for marketing automation), fit into a comprehensive OCO strategy.

Oracle is a leader in systems that most often serve as the foundations for websites: WCM platforms, portals and e-commerce. Complementary capabilities from acquisitions such as those of Endeca and Eloqua will address near-term needs for search and marketing functions, while providing an extended basis for OCO via more advanced capabilities such as content analytics, search-driven experiences and multichannel marketing.

### Cautions

Oracle's tendency to acquire vendors in overlapping or adjacent categories can force companies to adjust their online strategies and, in some cases, migrate from one product to another during a project. For example, customers that had been headed down the OCO path with WCM functions from Oracle WebCenter Content (formerly Universal Content Management) are now being urged to move toward Oracle WebCenter Sites for OCO and WCM. Oracle WebCenter Content is recommended for enterprise content management and publishing content into custom Web applications. Customers who attempt to stay only with Oracle WebCenter Content are likely to see support for WCM diminish over time, justifying a move to Oracle WebCenter Sites.

Despite its leadership position in WCM and related software categories, Oracle often appears like a "fast follower." Oracle WebCenter Sites has seen significant development investment since the FatWire acquisition, but Oracle's broad approach to innovation depends largely on acquisition, rather than organic R&D. Much of its development effort is devoted to rationalizing and integrating numerous software products and services, which may hamper progress in some areas.

Oracle is not coming up frequently on general WCM client shortlists that are made available to Gartner. This is a reflection of a marked decline in general market presence over the past year. Oracle does show up on Oracle-shop shortlists, but it has declined in visibility in the overall WCM market. This is an indicator that the company is not effectively marketing to non-Oracle shops, and is appealing more strongly to its installed base with other Oracle products.

### SDL

SDL, which is based in Maidenhead, U.K., views its WCM product, SDL Tridion, as part of its broader strategy for "global customer experience management," and increasingly focuses on marketing and e-commerce solutions. SDL's introduction of modules that optimize the online experience has raised the market's expectations of SDL in terms of quality, innovation and value.

### Strengths

From a marketing perspective, SDL has done very well to create more coherent, cohesive messaging in the past year in terms of customer experience management and the solution components required to get there. It continues to tailor its message effectively to different industries.

From a technology perspective, SDL's acquisition strategy has demonstrated a clever, insightful vision in the past few years, underpinned by the company's acquisition of Bemoko as part of its overall mobile strategy.

SDL keeps strengthening its partner base, in terms of both technology partners and those needed for different parts of the solution life cycle for OCO.

### Cautions

SDL has lagged behind other vendors in its mobile strategy. It will be some time before it catches up — through its acquisition of Bemoko — with vendors that have been more aggressive in this area. As mobility is a ubiquitous requirement in selection processes, this delay may have an impact on SDL.

SDL's sales execution has not been sufficiently effective. Gartner sees many cases where companies include SDL on longlists but not on shortlists. Prospects sometimes consider SDL too expensive compared with other .NET offerings, or lacking in functions and usability compared with some Java-based offerings.

SDL does not fully exploit its interoperability with Microsoft SharePoint, particularly compared with other vendors that have a .NET offering. Gartner still sees a high market interest in augmenting SharePoint with a best-of-breed .NET offering for Internet presence. SDL was a leader in this regard in 2008 and 2009, but Gartner rarely sees prospects including SDL on shortlists in such contexts today.

### Sitecore

Sitecore, based in Copenhagen, Denmark, appeals to organizations seeking fairly modest WCM solutions in addition to those, such as digital marketers, engaged in more ambitious OCO endeavors. The company's flagship product is Sitecore 6.6 and is based on .NET. Sitecore's Email Campaign Manager enhances its marketing and sales execution capabilities, while facilities for engagement analytics give marketers more autonomy in optimizing customer engagement across channels.

### Strengths

Sitecore has progressed from focusing solely on WCM to providing multiple components required for a successful OCO strategy, particularly in the area of digital marketing. The company has made

good progress in the past year — more prospects are including it on WCM shortlists, and it is growing in the WCM market.

At a time when OCO strategies are becoming more complex, Sitecore's provision of strategic services designed to increase their impact over the online channel is timely and effective. This will be instrumental in enhancing customer satisfaction further and helping customers increase ROI.

Sitecore's early foray into Japan has given it the experience and rigor to gain a foothold in China. Sitecore's platform is able to deal with challenging issues, such as multilingual and multichannel needs. It also provides device simulation capabilities to preview or visualize how the delivered experiences will look on different devices over different channels, which is an added advantage.

#### Cautions

Although Sitecore's vision is strong and well-aligned with the overall direction of OCO, the company does not balance that with the realities of such deployments. With overall budgets shrinking and customers expecting much shorter implementation times, Sitecore needs to execute on its vision more quickly to meet the demands of an ever-more cost-conscious — yet advanced — user group. Sitecore's customers in some regions tell Gartner that Sitecore's pricing is high or nonnegotiable.

Sitecore is a good fit for companies with digital marketing priorities or initiatives, but it is not as suitable for organizations with initiatives such as B2E. Sitecore's heavy marketing focus could be detrimental to its customer service.

Customers often consider Sitecore and its .NET strength when wishing to augment or enhance SharePoint, but it is less attractive to users looking for tools with a strong Java or LAMP stack focus. Its popularity is likely to decline as SharePoint becomes less of a consideration.

#### Squiz

**Squiz**, with head office in Sydney, Australia, markets a PHP offering called Squiz Suite, which consists of WCM, search (via Squiz's acquisition of Funnelback) and collaboration with external analytics providers such as Maxymiser and Google. The new Squiz Edge provides a content delivery network for added performance and personalization across global organizations. The company's core WCM product is Squiz Matrix 4.14.

#### Strengths

Squiz has a strong OSS community and has worked hard on its marketing and vertical positioning. Rather than emphasizing the merits of open source, Squiz has successfully aligned its offerings with the needs of key sectors, mainly government and higher education, and has also made progress in areas such as financial services, utilities and gaming.

Squiz's management team has transformed an open-source company that focused mainly on technology and consulting services into one that combines open source with cloud/SaaS and commercial off-the-shelf models. Squiz has data centers in Dallas, Chicago, London, Germany, Australia, Brazil, China and Japan. It either owns these data centers or subcontracts them from Amazon and Rackspace for redundancy.

Squiz provides enhanced online experiences beyond the core capabilities of WCM. It has achieved this by incorporating search technology from its acquisition of Funnelback, supplemented by a more recent partnership with MaxMind for its GeoIP intelligence. Squiz has gained the confidence of decision makers with its efforts to drive context awareness and its use of gamification to provide an iterative, incremental, experimental approach to devising customers' online strategy.

#### Cautions

Squiz has not gained much of a foothold beyond Australia and the U.K. Its continued lack of presence in North America will pose significant problems as other vendors establish an even greater stronghold in that region. This means that Squiz's marketing and sales execution efforts will meet even greater challenges when the company does increase its efforts.

More than 99% of Squiz's sales are direct through its regional offices, although it has started to build a sales relationship with Marketo, cooperating on joint sales and marketing efforts in Australia. Squiz has much work to do in addressing the scalability and sustainability of its business model, developing an extensive partner ecosystem and advancing its channel initiatives. The company runs the risk of being seen as a partnerless vendor, while exhausting itself to scale its business.

Squiz needs to increase its partnerships with vendors of key adjacent technologies, such as those for CRM, ERP and sales force automation. In addition, it needs to improve the ability of its software to interoperate easily and smoothly with such offerings. Doing so is necessary to compete effectively with vendors that cover more of the OCO solution landscape. Squiz has also not demonstrated as much activity and community contribution in this space as some of the other leading open-source communities.

## 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 appearing 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. This may be a reflection of a change in the market and, therefore, changed evaluation criteria, or a change of focus by a vendor.

#### Added

Automatic (which now satisfies all inclusion criteria)

## Dropped

- Atex (which did not provide supporting evidence that it met the revenue threshold)
- Dynamicweb Software (which did not provide supporting evidence that it met the revenue threshold)
- Limelight Networks (which did not provide supporting evidence that it met the revenue threshold)

## Inclusion and Exclusion Criteria

We determined which vendors to include on the basis of these criteria:

**Revenue:** The vendor's total WCM software revenue for 2012 must exceed \$13 million. Total WCM software revenue includes revenue generated by sales of WCM software, and software maintenance and support services. Total WCM software revenue includes revenue from:

**Licenses:** The right to use the software based on contract type (perpetual or term license)

**Cloud:** Revenue from cloud services, including business process as a service, infrastructure as a service and SaaS

**Subscriptions (excluding cloud):** Annual fees for licensed, on-premises software, as well as license revenue from single-tenant managed services (such as hosting)

**Technical support and maintenance:** Contract fees for support services (excluding training) and new versions, updates and upgrades

**Geographic presence:** The vendor must have been in business for more than five years, with a multigeographic presence for at least one year and a strategy that supports further geographic expansion. It must actively market its WCM offering in at least two major regions, such as North America and EMEA.

**Vertical and horizontal capabilities:** The vendor must actively market its products in more than two major vertical markets and in more than one horizontal application category (such as e-commerce and customer self-service).

**Market interest:** The market must be interested in the vendor, which should be evident from marketplaces, community forums, books, seminars, and the activities of partners and channel organizations (IT services firms, system integrators, distributors, interactive Web agencies and advisory firms).

**References:** The vendor must have WCM software commercially available and reference customers that use the software in production scenarios. Some of these customers should be of enterprise scale, with the number of contributing authors exceeding 50 and the average monthly number of page views comfortably exceeding 500,000, although we prefer deployments to support even larger numbers of users.

The WCM offering must be available as a stand-alone product or suite of products, and have the following functions at minimum:

- A content repository with basic library services, such as check-in/check-out and versioning
- Authentication of users (authors, editors and reviewers) and assignment of permissions
- Content authoring, through browser-based templates or via conversion from a word-processing application
- Workflow sufficient for content review and approval
- Conversion to HTML or XML and support of templates for Web rendering
- Managed delivery of content to Web servers or site management systems
- Multisite and multilanguage management
- Web analytics and reporting capabilities
- "What you see is what you get" design capabilities with the ability to customize look, feel and behavior independent of content
- Support for developer, administrator, editor, marketer and author roles in a distributed contribution environment
- Support for content aggregation and syndication (such as via APIs, REST interfaces and RSS)
- Ability to manage rich media in the context of Web efforts
- Ability to publish content for consumption on various devices (such as tablets, smartphones and TV sets)

## Evaluation Criteria

### Ability to Execute

Ability to Execute measures how well a vendor sells and supports its WCM products and services globally. The following list provides details of the specific evaluation criteria we used to assess Ability to Execute:

**Product/service** evaluates product functions in areas such as:

- Multisite and multilanguage management
- Web analytics and reporting
- Design
- Content modeling
- Metadata management

**Overall viability** includes an assessment of the vendor's financial health and the overall success of the company, together with the likelihood that it will continue to invest in the product.

**Sales execution/pricing** evaluates the vendor's success in the WCM market, including:

- WCM revenue and the installed base
- Pricing
- Presales support
- Effectiveness of the sales channel
- Level of interest from Gartner clients

**Market responsiveness and track record** evaluates how well the WCM offering matches buyers' requirements at acquisition. We assess the vendor's track record in delivering new functions when the market needs them. We also consider how the vendor differentiates its offerings from those of its major competitors.

**Marketing execution** evaluates the clarity, quality, creativity and efficacy of the vendor's efforts to market its WCM offerings. We examine aspects such as thought leadership, word of mouth and sales activities.

**Customer experience** evaluates functions or services within production environments, including:

- Ease of deployment
- Operation
- Administration
- Stability
- Scalability
- Vendor support

We assess this criterion through qualitative interviews with vendor-provided reference customers. We also use feedback from Gartner clients and other sources that use or have completed competitive evaluations of the WCM offering.

**Operations** evaluates the vendor's service, support and sales.

**Table 1. Ability to Execute Evaluation Criteria**

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

Source: Gartner (July 2013)

## Completeness of Vision

Completeness of Vision focuses on the vendor's potential and points to its future chance of success. A vendor can succeed financially in the short term, but won't become a Leader without vision and a strategic plan. A vendor with average vision will anticipate and respond to changes by noticing market trends and exploiting technology. A vendor with superior vision can anticipate, direct and initiate market trends, particularly if it integrates its vision into a broad range of areas, and capitalizes on product and service development. The following list details the criteria we used to assess Completeness of Vision:

**Market understanding** evaluates the vendor's ability to understand buyers' needs and translate those needs into vertical and horizontal WCM products and services. Vendors that show the highest degree of vision listen to buyers, understand their wants and needs, and can shape or enhance those wants and needs. WCM vendors that show the highest degree of market understanding adapt to customer requirements in areas such as SaaS, dynamic contextualized delivery and ease of use for nontechnical staff.

**Marketing strategy** evaluates the extent to which the vendor articulates a differentiated message and communicates it consistently throughout the organization and through its website, advertising, customer programs and positioning statements, as well as statements of direction and product road maps.

**Sales strategy** evaluates the vendor's use of direct and indirect sales, marketing, service and communications to extend the scope and depth of its market reach.

**Offering (product) strategy** is the vendor's approach to product development and delivery that emphasizes functions and features as they map to requirements for WCM. We also evaluate the vendor's development plans for the next 12 to 18 months.

**Business model** evaluates the soundness and logic of the vendor's underlying business proposition and whether it offers synergies with other ECM components, such as DAM, records management and document management.

**Vertical/industry strategy** evaluates how the WCM vendor uses its direct resources, skills and offerings to meet the specific needs of individual market segments, such as the media industry.

**Innovation** evaluates the vendor's development and delivery of differentiated WCM technology that addresses critical customer requirements. We evaluate product capabilities and use by customers in areas such as:

- Templating
- Workflow and change management
- WCM repositories
- Library services

We also look at other product-specific capabilities needed and deployed by customers.

**Geographic strategy** evaluates how the vendor meets the specific needs of geographic regions outside its home territory. We assess whether the vendor's partners, channels and subsidiaries are appropriate for those regions.

**Table 2. Completeness of Vision Evaluation Criteria**

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

Source: Gartner (July 2013)

## Quadrant Descriptions

### Leaders

Leaders should drive market transformation. Leaders have the highest combined scores for Ability to Execute and Completeness of Vision. They are doing well and are prepared for the future with a clear vision and a thorough appreciation of the broader context of OCO. They have strong channel partners, a presence in multiple regions, consistent financial performance, broad platform support and good customer support. In addition, they dominate in one or more technologies or vertical markets. Leaders are aware of the ecosystem in which their offerings need to fit. Leaders can:

- Demonstrate enterprise deployments
- Offer integration with other business applications and content repositories
- Provide a vertical-process or horizontal-solution focus

### Challengers

Challengers are solid vendors today and can perform well for many enterprises. The important question is whether they have the vision to succeed tomorrow. A Challenger may have a strong WCM product but a product strategy that does not fully reflect market trends, such as the increasing importance of the user's context, multichannel output and interoperability with adjacent technologies (for example, CRM, DAM and multichannel campaign management).

### Visionaries

Visionaries are forward-thinking and technically focused. For example, their products may have unique multilingual capabilities or set the market's direction through their innovation and product development. To become Leaders, they need to work on some of the core aspects of their offerings and increase their Ability to Execute. They may need to build financial strength, functional breadth, service and support, geographical coverage, or sales and distribution channels. Their evolution may hinge on the acceptance of a new technology or on the development of partnerships that complement their strengths.

### Niche Players

Niche Players focus on a particular segment of the market, as defined by characteristics such as size, industry and project complexity. This narrow focus can affect their ability to outperform or to be more innovative. Niche Players often support only those applications that apply to the particular segments on which they focus.

## Context

WCM plays an increasingly important role in business performance. It has become, in many cases, the central point of coordination for initiatives involving the enterprise's online presence, and these initiatives have become more sophisticated and more important to enterprises' business strategies. Thus, WCM is key for organizations wishing to execute a strategy of OCO that embraces areas such as customer experience management, e-commerce, digital marketing, multichannel marketing and

website consolidation.

WCM's evolving role continues to drive growth in this market and contribute to its dynamism. Revenue in the WCM software market totaled approximately \$1.2 billion in 2012. Growth was lower than in recent years, at 7%, but that was mainly due to the tough economic conditions in many major markets. We expect that revenue will grow by 12% in 2013, to reach approximately \$1.4 billion. North America accounts for 54% of revenue, EMEA 26% and Asia/Pacific 16%. We project that the WCM market will see a compound annual growth rate of approximately 10% from 2012 to 2017. These numbers reflect the increasing importance enterprises place on the online channel and improving visitors' experience. WCM will keep growing as a percentage of the overall ECM market, rising from almost 26% of this market in 2012 to 28% in 2017.

## Market Overview

Customers now demand more from WCM than its traditional, fundamental role of just facilitating content creation and publishing. Customers need the systems responsible for managing their online presence to cover a broader range of activities. They expect their WCM systems to support their OCO strategies. Organizations are treating their online presence more strategically, and the influence of the business is becoming as prominent as that of IT. Consequently, the market is more focused on the impact of the online channel than on the method itself. The need to make the most of the online channel is driving the market — for example, to increase sales or improve customer loyalty.

In the shift toward broader capability and increased business requirements, WCM as a category is starting to overlap with other categories. As WCM vendors broaden their offerings to encompass areas such as marketing, campaign management and Web analytics, they are competing with incumbents and emerging providers in these areas.

Although in most cases WCM market dynamics and requirements remain distinct from those of horizontal portals, the overlap between the two markets is increasing. The roots of WCM lie in the creation, organization and publication of content, while portals provide a single point of access to information and applications that often already exist in disparate places. But customer demands and the convergence of WCM and portal capabilities in some vendors' offerings are leading a growing number of customers toward single platforms that serve both purposes. This could lead to greater use of the user experience platform (UXP), a promising approach for establishing the necessary technologies for executing an OCO strategy (see "Optimize Your Online Presence and Enhance the Experience for Customers and Users").

Meanwhile, social computing trends and the consumerization of technology have urged greater user centrality in both markets. Demand has grown in the portal market for team-oriented and personal portals. The WCM market has had to quickly accommodate user-generated content and greater "democratization" — for example, with users other than traditional corporate publishers now using WCM to provide feedback on sites.

Consumerization has created a huge demand for usability and social features that drive user engagement in WCM platforms. Competitive WCM vendors now develop products with user appeal, the digital experience and user-centered design in mind — both for those who create and manage content and for those who consume it. WCM will continue to be the tool that delivers the enhanced user experience required by the increased use of mobile computing and social media.

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