

MarketScope for User Experience Platforms

31 January 2014 ID:G00249149

Analyst(s): Gene Phifer, Jim Murphy, Ray Valdes, Gavin Tay

▼ VIEW SUMMARY

As they develop Web, portal and mobile strategies, IT leaders should consider offerings from the emerging UXP market. UXPs supply consistent, high-fidelity user experiences across a breadth of services, and the sites and apps created by a UXP can be deployed across multiple channels and devices.

What You Need to Know

This document was revised on 21 February 2014. For more information, see the [Corrections page](#).

Traditional approaches to architecting, developing and managing websites, portal sites and mobile apps use a variety of disconnected and duplicative tools. Developers commonly use their favorite tools, and as multiple developers work on an enterprise's multiple websites, a maintenance nightmare inevitably develops. As enterprises expand their Web footprints by deploying more sites, and as mobile apps become the norm, enterprises should rationalize the tools used and implement a platform approach for the development of websites, portals and mobile apps (see "A Platform Approach for Websites, Portals and Mobile Apps Leads to Faster Time to Market and Improved User Experience"). A user experience platform (UXP) is a leading approach for this, and a market for UXP products is emerging.

UXPs are rationalized, integrated sets of components used to build and manage a variety of websites, portal sites and mobile apps. Services delivered via a UXP generally include:

- Content
- Context
- Portal
- Collaboration

NOTE 1

VENDORS NOT INCLUDED IN THE UXP MARKETSCOPE

The following vendors were evaluated for inclusion in the UXP MarketScope, but did not meet Gartner's minimum requirements:

- **Cisco** — Cisco Social (originally Quad) is no longer being positioned as a broad-based collaboration platform.
- **Enonic** — Has a good UXP vision, but has mainly content-centric capabilities and European-only distribution to date.
- **e-Spirit** — Content-centric, with some additional features.
- **HP** — Many products, but no UXP vision or packaging.
- **NexJ** — Vision is toward a UXP, but is delivering mainly content and portal functionality.
- **Red Hat** — Portal-centric, with some additional features.

Gartner focused evaluation criteria on those vendors that are relevant to a newly emerging market. Therefore, we focused on functionality, customer experience and innovation, rather than on breadth of vertical industry coverage and history of customer support. The evaluation criteria are weighted the same for a reason: This is the first MarketScope for the UXP market, and, although this market is emerging, it is still quite immature. Requirements are evolving, and user requirements are in flux; therefore, it's too early in the life cycle of the market to rate some evaluation criteria as more important than others.

VENDORS ADDED OR 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

- Social
- Mobile
- Search
- Analytics
- Orchestration/composition
- Integration and API services

A UXP provides a high-fidelity and consistent user experience across the breadth of services provided. The sites and apps created by a UXP may be deployed across multiple channels and devices, and may face any of these audiences:

- Employees
- Customers
- Consumers
- Business partners
- Suppliers
- Contractors
- Citizens
- Students, staff, alumni, etc.

As enterprises formulate their strategies for website, portal and mobile app development, they should evaluate an emerging set of UXP vendors. Some enterprises may choose to adopt their UXPs from single vendors, while others may adopt a UXP as the core of a platform, while supplementing it with additional technologies.

MarketScope

A UXP is an integrated set of tools for delivering modern websites and portals. It focuses on the front end, the presentation and user interaction layer. Integration within the UXP and with back-end services is achieved primarily through portlets, widgets and integration technologies — for example, an enterprise service bus (ESB) or Web services — with the dominant industry model being Web-oriented architecture (WOA), facilitated by RESTful widgets consumed via open APIs. A UXP consumes business application data, services and transactions from a variety of back-end systems and tools; assembles and orchestrates them; combines them with supporting tools, such as search and collaboration; and delivers the resulting interfaces in a targeted manner to a variety of channels and devices.

A UXP can serve as the enabling, unifying system for multichannel, modern Web initiatives and next-generation digital marketing intranets, as well as B2B collaboration environments. A UXP can serve any audience and support any business function that requires human interaction.

The platform approach enables organizations to assemble the tools necessary to support websites, portals and mobile sites that have a variety of requirements and features. For example, a business-to-

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.

GARTNER MARKETSCOPE DEFINED

Gartner's MarketScope provides specific guidance for users who are deploying, or have deployed, products or services. A Gartner MarketScope rating does not imply that the vendor meets all, few or none of the evaluation criteria. The Gartner MarketScope evaluation is based on a weighted evaluation of a vendor's products in comparison with the evaluation criteria. Consider Gartner's criteria as they apply to your specific requirements. Contact Gartner to discuss how this evaluation may affect your specific needs.

MarketScope Rating Framework

Strong Positive

Is viewed as a provider of strategic products, services or solutions:

- Customers: Continue with planned investments.
- Potential customers: Consider this vendor a strong choice for strategic investments.

Positive

Demonstrates strength in specific areas, but execution in one or more areas may still be developing or inconsistent with other areas of performance:

- Customers: Continue planned investments.
- Potential customers: Consider this vendor a viable choice for strategic or tactical investments, while planning for known limitations.

Promising

Shows potential in specific areas; however, execution is inconsistent:

- Customers: Consider the short- and long-term impact of possible changes in status.
- Potential customers: Plan for and be aware of issues and opportunities related to the evolution and maturity of this vendor.

Caution

Faces challenges in one or more areas.

- Customers: Understand challenges in relevant areas, and develop contingency plans based on risk tolerance and possible business impact.
- Potential customers: Account for the vendor's

consumer (B2C) website may require Web content management (WCM), digital marketing technologies, e-commerce, social media, search and analytics, whereas a business-to-employee (B2E) portal may require a portal product, document collaboration, search and extensive business application integration capabilities. By creating a platform and populating it with appropriate tools and components, an enterprise delivers a ready-made framework for its developers to use for any website or portal requirement. A UXP may also include tools for building a variety of mobile websites and mobile applications. Developers can pick and choose, assembling the capabilities they need from the portfolio of tools and components in the UXP.

Organizations won't necessarily need a different set of tools for each channel, because the tools in the UXP support multiple channels. The platform's reusability of tools and components benefits IT in the form of efficiency and cost control; however, it also benefits business stakeholders as a more unified way to engage with their constituencies, and end users, who benefit from a more cohesive experience across channels. Efficiencies derived from platform approaches can also lead to reduced time to market, benefiting all parties.

UXP is first and foremost a platform concept, and secondarily a product concept. However, the market for UXP products is now emerging, with large and small vendors providing solutions. A suite of separate (yet integrated) products can be bundled into a UXP, into a single product offering encompassing a suite or as a single product in a unique product offering.

Some enterprises will choose the "roll your own" approach, assembling their UXPs from a set of best-of-breed products and open-source components. For them, the UXP market will not be a choice, except as a source for components.

Other enterprises will choose to obtain their UXP as a suite (or single product) from a single vendor. Others will buy all or part of a vendor's UXP solution, and supplement the rest with existing technologies or technologies from other vendors. Although most UXP offerings are fairly complete, they all aren't, and this latter approach will be relatively common. For these enterprises, the UXP market will be the source of their solutions.

A UXP is typically delivered as software to be deployed on-premises, but many UXP vendors have cloud options. Most of them support an infrastructure as a service (IaaS) deployment model, where a single-tenant version of the UXP software is deployed on top of a shared hardware IaaS. Some support a private cloud model, where the UXP can be deployed as a UXP as a service (uxPaaS) inside the corporate network. Finally, a few support a shared, public cloud deployment of a uxPaaS.

Market/Market Segment Description

The UXP market is a composite market, meaning it's an aggregation of multiple constituent products. The market is on track to develop into a stand-alone market in the future. There are already examples of stand-alone UXP products (e.g., Microsoft SharePoint and IBM Customer Experience Suite).

A UXP has a core set of technology services that deliver the essential functions of WCM, portal, integration and compositing (see Figure 1). These services are typically delivered by an integrated set of components that form a platform. Simply calling a collection of products a UXP doesn't do it. The services of a UXP must have a minimum level of integration — for example, a common user identity

challenges as part of due diligence.

Strong Negative

Has difficulty responding to problems in multiple areas.

- Customers: Execute risk mitigation plans and contingency options.
- Potential customers: Consider this vendor only for tactical investment with short-term, rapid payback.

and access management model, a common deployment/maintenance model, and, as much as possible, a common look and feel. The core services must also be designed to eliminate the redundancy and conflict caused by bolting WCM, portal and other Web products together.

Underlying the UXP is a set of supporting infrastructure services, such as identity and access management, security, runtime and system management. In addition, some of the underlying infrastructure services may be extended by the UXP — for example, portals and context-aware tools can extend identity services. The basic features of a UXP are described in the sections that follow.

Web Content Services

Every website or portal needs content management capability to support the creation, organization, publication and retirement of information on the site or portal.

Portal Services

Although not every website needs to be a portal, modern horizontal portal capability is necessary to support a broad UXP strategy. Portal services deliver a personalized, unified point of access, aggregating and integrating relevant content, applications, business processes and other people. Chief among the portal's services are the coordination of access management, personalization and targeting, and customization, which allow contextual access to Web resources. The essential portal method, including a page framework and component (portlet or widget) model, is critical for the UXP's interoperability, extensibility and reuse.

Integration and API Services

Modern websites and portals must be able to consume and distribute content, applications and services through Web services and APIs. Of course, portals have traditionally focused on the consumption side, invoking content and applications from a wide variety of Web-based and non-Web-based resources. However, in a world in which a single website or portal does not constitute an enterprise's complete Web presence, the UXP must be able to consume and deliver APIs to other websites, portals and mobile apps. A model that exposes REST-based APIs not only facilitates multichannel deployment (for example, PhoneGap-style, wrapped HTML hybrid mobile apps) and third-party consumption of business services, but also facilitates integration between back-end services and the UXP. The integration framework may also rely on SOAP-based Web services or integration technologies, such as an ESB or an integration broker to consume application content and services from back-end systems.

Compositing Services

Representing the front-end interaction layer, the UXP isn't itself an application development platform. It is poor practice to encapsulate business logic inside the user experience layer. The UXP still requires the ability to assemble and tie together application components for a variety of purposes and audiences. The visual component model, known generically as the "portlet," serves as a fundamental building block for assembling composite applications that can employ the UXP's other services, such as personalization and security. Lately, widgets (easier-to-create RESTful components that depend less on server-side processing) have overtaken the longer-established portlet model. Portlets and widgets ease the difficulty of integration and extension, and enable IT to more safely delegate the assembly and management of websites and pages to business users.

Basic Context Services

A foundation for context-aware computing (see "Drive Customer Intimacy Using Context-Aware Computing") is required for a UXP. As a starting point, most organizations will need to employ personalization to deliver relevant information and applications based on the user's role, the device they're using or their location.

Basic Mobile Services

The ability to render mobile Web content for consumption in the Web browser of smartphones and tablets is a core requirement.

Basic Analytics Services

UXPs must have the ability to provide Web and portal analytics to help monitor use and measure success of their website and portal efforts.

Basic Rich User Interface Support

UXPs must support UI technologies that deliver rich experiences, including HTML5, and related technologies (e.g., CSS3 and JavaScript), as well as traditional RIA technologies, such as Adobe Flash.

Additional Features of the UXP

Other features of the UXP are considered optional, but they are frequently necessary for the creation of modern websites and portals.

Advanced Content Services

In addition to Web content services, other content capabilities such as digital asset management (DAM) and document management are frequently needed. This may lead all the way to enterprise content management (ECM) capabilities. Leading UXPs also enable end users to create and manage content without IT intervention. This is particularly true of the digital marketing use case, where the marketing department can, by itself, create and launch websites for ad campaigns and brand sites.

Advanced Context Services

The ability to test and target Web content is frequently a requirement, especially in digital marketing use cases, where behavioral targeting is a requirement. Multiattribute personalization, based on a combination of static and dynamic attributes and driven by a rule engine, is a feature of advanced context. Contextual services for mobile devices (for example, location-based services) is also a frequent requirement.

Advanced Mobile Services

As mobile computing continues to grow explosively, finding ways to effectively deploy Web assets to mobile channels is paramount. A UXP, with its Web content services, open API and mobile capabilities, enables enterprises to mobilize websites and portal sites. An approach that is resonating with enterprises is a PhoneGap-like wrapped HTML hybrid mobile app model. The capabilities of an advanced UXP facilitate this model. A full mobile application development platform (MADP) capability may also be included in a UXP, which would extend the UXP to native mobile apps. A mobile device management

(MDM) capability can also be an advanced feature of UXPs.

Advanced Analytics Services

Cross-channel website and portal strategies will increasingly require the ability to gather analytics across many points of interaction, including websites, portals, social sites and more-traditional data warehouses. The onslaught of big data will require the analytics services of a UXP to handle a variety of data sources for analytics. UXPs will help support real-time decision making for users, and they'll help organizations sense and respond to changes in market demand. Advanced UXPs may also expose their own analytics in an open model for other analytics tools to consume.

Advanced UI Support

Modern Web users expect richer, more engaging and more rewarding experiences, so UXPs will provide support for a variety of advanced user interface technologies. As Adobe Flash and Microsoft Silverlight give way to HTML5, new user interface technologies and modes of interaction, such as touch and voice, will require support. Responsive Web design capabilities are also a feature of leading UXPs.

Advanced Search Services

Search has been a much underappreciated and underutilized feature in many portal and WCM platforms and initiatives, which is a somewhat surprising dynamic, considering Google's demonstrated success on the consumer Web. UXPs will employ advanced search more prominently to help users and IT departments deal with greater volume, variety and disparity of information sources, including internal and external Web content, documents and digital assets. No longer just a search box, search technology will provide an engine to deliver relevant information and applications to users. Advanced search will deliver search results and order bias based on contextual variables and may provide a valuable source of information for digital marketing purposes.

Communications and Collaboration Services

In some cases, UXPs will provide a range of tools that enable people to work together, whether asynchronously with tools such as document collaboration, threaded discussions, team rooms and forums, or real-time with voice over Internet Protocol (VoIP), instant messaging and Web-based online meeting tools.

Social Computing Services

Closely related to collaboration, websites, portals and mobile applications increasingly require social computing capability and interoperability. Internal portals and websites often employ core social capabilities, such as social profiles, activity streams, social graphs and folksonomies, to better engage users, to provide better peer-to-peer service, and to improve information management and findability. External websites and portals use social capabilities to improve customer self-service and support. Marketing groups must manage social presence not only on the organizations' own Web properties, but also in public social media outside of their control, such as Facebook or Twitter (see "Managing Engagement Through Multiple Social Media Channels").

E-Commerce Services

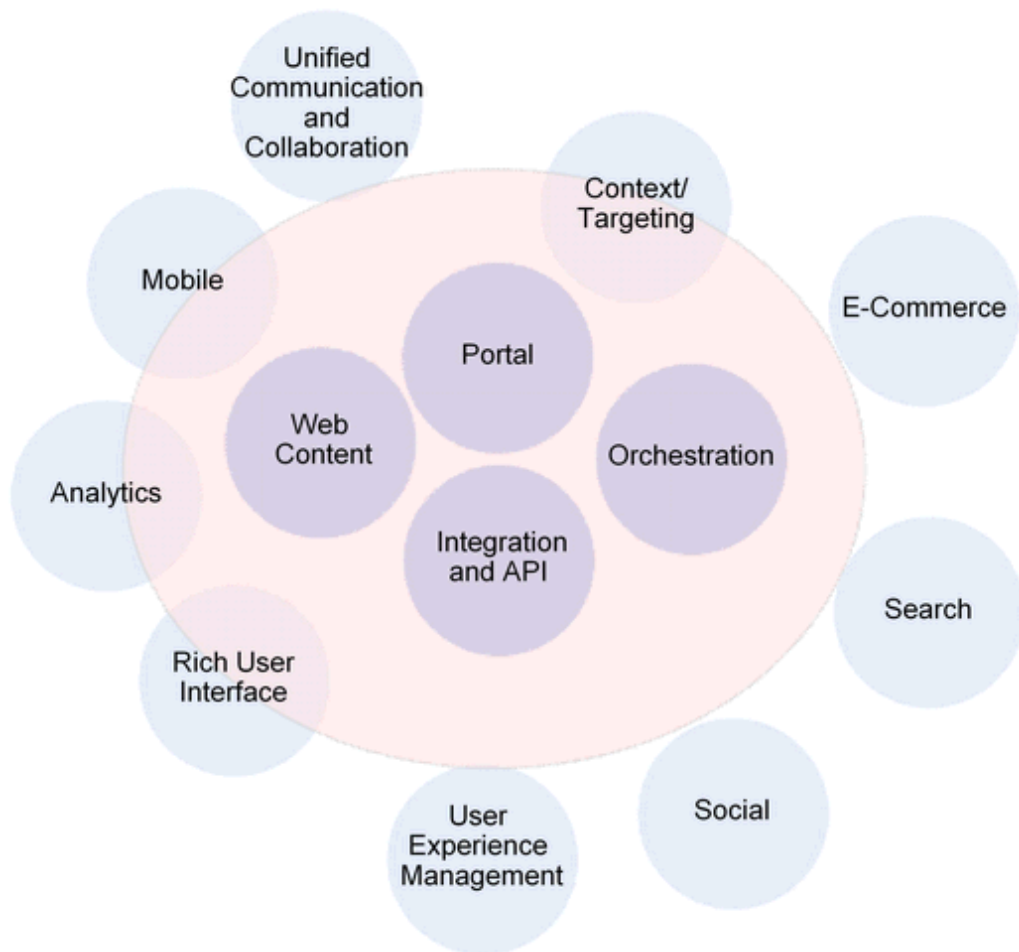
E-commerce capabilities are necessary for organizations transacting on the Web. Frequently included

are transaction capabilities, catalog management, merchandising functionality, promotions support, credit card validation and shipping. Depending on the importance of the Web channel, the size and breadth of the business, and the need to support many sales channels and many products (as in consumer products and retail), some organizations will use an e-commerce platform as a foundational component of their UXP.

User Experience Management Services

Effective user experience is becoming a first-level requirement for many organizations. A UXP can deliver programmatic support for user experience methodologies, such as user-centered design, usability testing, personas, user scenarios, journey maps, interaction patterns and testing/targeting. Experienced user experience designers and developers primarily use offline tools (for example, spreadsheets and presentations) to keep track of these user experience artifacts. The need for online support is evident, as is the need for enhanced user experience skills within the enterprise (see Figure 1). Advanced site optimization features, such as A/B and multivariate testing, can also be part of a UXP.

Figure 1. UXP Services



Items inside the circle are fully included in the base definition.

Items intersecting the circle are partially included in the base definition, with additional optional features.

Items tangential to the circle are not included in the base definition, but are frequently included as optional features.

Source: Gartner (January 2014)

Inclusion and Exclusion Criteria

The inclusion criteria target basic UXP functionality (see Note 1). Where offerings have advanced functionality, the ratings were elevated. Here are the inclusion criteria for this report:

- **Demonstrated support for various deployment scenarios:** The vendor must provide technology supporting deployment in a variety of scenarios, including employee, customer-facing and partner websites, portals and mobile apps. Vendors must have live customer references that

are using their UXP offerings for this variety of scenarios.

- **Geographic coverage:** The vendor must provide sales and support for the UXP offering, in at least two of the following five geographic regions: North America; Latin America; Europe, the Middle East and Africa; Japan; and the Asia/Pacific (APAC) region. The vendor must also have live customers in at least two of these regions.
- **Horizontal coverage:** The vendor must support clients in more than one industry vertical.
- **Revenue and market criteria:** The vendor must have achieved at least \$6 million in annual UXP-related product and service revenue as of FY12
- **Functional requirements:**
 - WCM services
 - Content creation and authoring functions, such as templating, workflow and change management
 - WCM repository that contains 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), 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
- **Portal services:**
 - Page component model (e.g., portlets and widgets)
 - Orchestration between page components and pages
 - Personalization/customization
- **Orchestration/composition services:** Consumption of Web widgets, workflow, page flow
- **Integration and API services:**
 - Point-to-point integration via portlets and widgets
 - Ability to integrate with integration brokers and buses
- **Basic mobile services:** Create mobile-friendly rendition for consumption in mobile browsers
- **Basic context services:**
 - Personalization
 - Targeting
- **Basic rich UI capabilities:** HTML5 support
- **Basic analytics services:**
 - Web analytics

- Portal analytics
- **Integration across the suite:**
 - Common user identity and access model
 - Common deployment/maintenance model

Rating for Overall Market/Market Segment

Overall Market Rating: Promising

The UXP market is emerging, with many vendors promoting the concept and providing solutions that match the criteria. However, this market is emerging, so it has no track record. In addition, the concept of a platform of tools for creation of websites, portals and mobile apps is contrary to the philosophy of many Web developers. Although we consider this market promising, there are still risks that may delay or impede its success.

Evaluation Criteria

Table 1. Evaluation Criteria

Evaluation Criteria	Comment	Weighting
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 or account support. This can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups and SLAs.	Standard
Innovation	Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or preemptive purposes.	Standard
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 and understand buyers' wants and needs, and can shape or enhance those with their added vision.	Standard
Marketing Strategy	A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the website, advertising, customer programs and positioning statements.	Standard
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.	Standard

Overall Viability (Business Unit, Financial, Strategy, Organization)	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 in the organization's portfolio of products.	Standard
Product/Service	Core goods and services offered by the vendor that compete in and serve the defined market. This includes product/service capabilities, quality, feature sets and skills, whether offered natively or through OEM agreements and partnerships, as defined in the market definition and detailed in the subcriteria.	Standard

Source: Gartner (January 2014)

Figure 2. MarketScope for User Experience Platforms

	RATING				
	Strong Negative	Caution	Promising	Positive	Strong Positive
Acquia				X	
Adobe					X
Backbase				X	
Ektron			X		
eXo			X		
eZ Systems			X		
IBM					X
Liferay				X	
Microsoft					X
OpenText				X	
Oracle				X	
Oxycyon			X		
salesforce.com				X	
SAP				X	
Sitecore				X	
Squiz			X		
Temenos Group			X		

As of 31 January 2014

Source: Gartner (January 2014)

Vendor Product/Service Analysis

Acquia

Acquia is a venture-funded company that formed around the open-source Drupal platform. Drupal is a WCM offering with portal-like aspects (modular framework of components, identity management, multi-

site configuration) as well as social publishing, collaboration, integration, internationalization (110 languages) and accessibility support. The adoption of Drupal has shown strong growth during the past decade, with approximately 900,000 sites and an ecosystem of more than 20,000 modules. Acquia is a venture-funded company, with \$68 million invested, and it has garnered approximately 3,800 enterprise customers. Acquia has enhanced the Drupal platform with cloud-based implementations, social software, e-commerce and vertical applications (government, education, media, publishing and high tech). Some flagship users of Drupal include Twitter, Mercedes Benz, Warner Music Group and Stanford University.

Strengths:

- Drupal is a mature offering, with a large ecosystem of third-party modules and a large community of developers and system integrators (SIs)
- Acquia's UXP can be quite inexpensive for "plain vanilla" implementations
- Acquia has vertical functionality that can add value for enterprises in government, education, media and publishing

Challenges:

- As Drupal has evolved and matured, it has also become more complex
- Acquia is a relatively small company whose UXP product has a short track record in the market
- PHP and the LAMP technology stack are considered to be outside the mainstream by many enterprises

Adobe

Adobe's entry into the UXP market consists of the combination of two broad suites: Adobe Creative Cloud and Adobe Marketing Cloud. Creative Cloud is used for creation of digital assets, while Marketing Cloud is used to deploy and manage those assets. Adobe technologies and services are dominant in the world of digital marketing, and its products are heavily used by marketing departments, digital agencies, SIs and IT organizations. Adobe's primary strategy is to focus on digital marketing and the empowerment of marketing users.

Strengths:

- Adobe has assembled two industry-leading suites from the acquisition of best-of-breed components and internal development.
- Adobe's solutions stand out in customer-facing use cases, especially in consumer-facing scenarios.
- Adobe is the toolset of choice for creative professionals, and is firmly cemented as a preferred vendor in the digital marketing ecosystem.

Challenges:

- Enterprises using or attempting to use Adobe in nondigital marketing use cases don't receive much attention from Adobe, despite the significant deployment of Adobe products in nondigital

marketing scenarios.

- Adobe must work through the ongoing transition from its perpetually licensed Creative Suite to its term-licensed Creative Cloud, and deal with a visible number of customers dissatisfied with cost increases associated with that transition.
- Adobe needs to further its penetration into the enterprise, especially into enterprise IT.

Backbase

Backbase's core competency is in user experience technologies, having started as a rich Internet application (RIA)/mashup vendor in the 2000s, then evolving into a lean portal platform, and finally broadening its scope to include strong support for mobile, content management, forms and customer experience management (CEM). Backbase has also established a substantial presence in the financial services vertical, with customers in the public sector and telecom adopting the product recently. Its Customer Experience Platform offering is used primarily to support customer-centric scenarios, including customer service, customer self-service and digital marketing. Based in the Netherlands, Backbase's initial foothold was in Europe; however, the vendor has garnered significant sales in North America, with plans to expand to the APAC region. Backbase is available for on-premises deployment, but also has cloud-based options.

Strengths:

- Backbase has a strong, compelling vision of a UXP, with good integration between its WCM and website optimization tools, and powerful compositing features.
- Backbase has good support for mobile development, both native and hybrid applications.
- Backbase has an excellent track record in financial services and banking segments.

Challenges:

- The company is relatively small, with limited visibility and sparse presence in some regions.
- Backbase has a strong presence in the financial sector, but not nearly as much in other vertical markets.
- Backbase is premium-priced, and enterprises in verticals such as education and government may find Backbase expensive, especially compared with open-source alternatives.

Ektron

Ektron comes from a foundation of WCM with a focus on persona management, content targeting and marketing optimization. Ektron's digital experience hub (DXH) provides a central point of integration to third-party analytics (Google Analytics and Webtrends), CRMs (salesforce.com and Microsoft Dynamics), content repositories (Microsoft SharePoint) and marketing automation (Marketo and Hubspot). The digital experience is facilitated via its responsive design framework, ensuring consistency across multiple channels of delivery, including mobile.

Strengths:

- Ektron's DXH is open-architected and relatively easy to interoperate and integrate.
- Ektron combines search, persona management and analytics, providing a stronger contextualization of the user.
- Ektron has an established network of UXP ecosystem partners with prebuilt connectors.

Challenges:

- Ektron's penetration into multinational organizations is one of its mechanisms of worldwide reach, but it remains largely driven from its North American base.
- Ektron focuses on multichannel Web experience and digital marketing, but is lesser known for delivery of overall user experience capabilities.
- Ektron's DXH provides interoperability with several third-party solutions. However, organizations looking for a modest UXP in a box or in the cloud will be challenged.

eXo

The eXo platform was built from the ground up on a Java-centered framework that is coupled with a collection of complementary technologies such as collaborative content management, workflow, social computing (e.g., wikis and activity streams) and a Web-based integrated development environment (IDE). Its ethos is centered on the employee as a social collaboration platform. eXo comes in four editions: Community, Express, Enterprise and Cloud.

Strengths:

- eXo has a high level of out-of-the-box functionality.
- eXo's foray into uxPaaS qualifies it as one of the first to market with that cloud-based alternative.
- eXo's social platform focus appeals to enterprises looking for a social intranet or customer-facing social sites.

Challenges:

- eXo is a small and little-known vendor, resulting in a shortage of skilled professionals who are familiar with the platform.
- Although eXo appeals as an all-encompassing platform, interoperability with external systems demands custom development.
- Marketed as a social platform, eXo may not appeal to enterprises looking for use cases that aren't social-centric.

eZ Systems

Since 1999, eZ Systems has offered a WCM package called eZ Publish. The PHP-based offering has evolved over the years to become a UXP, and is now called eZ Publish Platform 5. It now has a broader scope that includes real-time analytics and visualization of usage data, recommendation engine, content scheduling and workflow, integrated A/B and multivariate testing. The core package is available

as an open-source GPL-licensed Community Edition. In addition, there is an open-source library of general-purpose components for authentication, caching, email and multilingual translation. The eZ Publish Platform 5 is now fully integrated with the Symfony2 PHP framework, delivering enterprise-class solutions for digital experiences. The company also offers a cloud version of eZ Publish, hosted by Ixonos (Finland-based cloud provider).

Strengths:

- The product is mature and has been in the market a long time, with good customer references.
- eZ Systems has a strong vision for a platform approach to customer experience management.
- Integrated digital marketing and content optimization features provide a solid differentiator.

Challenges:

- The company is small, with relatively low visibility and not much market presence, despite its longevity.
- PHP and LAMP technology stack are considered to be outside the mainstream by many enterprises.
- Functionality is central to its WCM and content publishing roots, with limited capabilities outside that scope.

IBM

IBM's entries into the UXP market are based on the WebSphere Portal and complement other technologies. These include Web Content Management, Worklight (mobile), Connections (social), OmniFind (search), Digital Analytics (formerly CoreMetrics), WebSphere Commerce, Kenexa (HCM and talent management) and IBM Campaign (formerly Unica). IBM is one of the few UXP vendors with more than one formal offering: the Customer Experience Suite and the Employee Experience Suite. Both are aligned with IBM's Digital Experience strategy, are based on IBM's Digital Experience Platform technology, and each has a set of complementary technologies to target the specific constituent audience.

Strengths:

- The IBM WebSphere Portal, the core of its UXP, is one of the strongest horizontal portal offerings on the market.
- IBM has acquired industry-leading vertical technologies (e.g., IBM Campaign and Kenexa) to support customer-facing and employee-facing initiatives, and included them in the respective UXP offerings.
- IBM has a broad portfolio of technologies, and has continued to tighten the off-the-shelf integration across their suites, while delivering an open architecture for inclusion of non-IBM technologies.

Challenges:

- Although cross-suite integration has moved forward, IBM still has room to improve.
- IBM's UXPs only run on the WebSphere platform, and have limited support for multitenant cloud deployment.
- IBM's UXP offerings are high-end solutions, which may lead to complexity and higher total cost of ownership (TCO).

Liferay

Liferay is a provider of open-source software centered on portal capability. The organization's UXP is rooted Liferay Portal, which includes Liferay Sync (a document and file syncing service), Liferay Developer Studio, Liferay Mobile SDK and Liferay Content Targeting Plugin. Liferay's broader set of optional offerings including Liferay Social Office, and Liferay eC Adapter Bundle, a product jointly developed with integration specialist Tibco Software to enhance Liferay's capability as a composite application framework. All Liferay products leverage the same user interface toolkit, called Alloy UI.

Strengths:

- Liferay continually articulates and executes on an incisive vision of the emerging UXP market and its position in the future. Its marketing, product and ecosystem plans offer a useful balance between long-term vision and short-term business results.
- Liferay's platform is characterized by its relatively lightweight support for heterogeneous environments, its leveraging of enterprise-proven Java technology and its low TCO.
- Liferay's considerable momentum in the portal market puts it in position to serve as a foundation for UXP, even when it doesn't provide all of the ancillary components.

Challenges:

- Liferay continually faces pressure to provide a more expansive suite, while its appeal to many organizations has been, in contrast with larger competitors, as a lightweight, lean, best-of-breed product.
- Outside of the Portal capability, Liferay's product offerings lack some of the usability and manageability refinements of some other commercial products for content management, search and collaboration.
- Liferay has mostly an IT developer and architect appeal in a world where business leaders are becoming more influential in Web decisions.

Microsoft

Microsoft's UXP centers on SharePoint products and technologies. The current version is SharePoint Server 2013, which comes in Standard and Enterprise editions. Microsoft also offers the cloud-based SharePoint Online as part of its Office 365 Suite. SharePoint is an integrated platform intended to break down information silos and enable sharing, employing ECM, collaboration, social computing, enterprise search and business intelligence capabilities. SharePoint was the first major product on the market to exhibit the concept of a UXP.

Strengths:

- Microsoft has been a prime mover in the UXP market. First introduced in 2001, SharePoint has grown a large and firm foothold on the market, especially for internal enterprise scenarios.
- Unlike many competing UXP offerings, SharePoint represents a single, unified product, sharing core services such as content management, identity and access management, and a common user experience across many functions and components.
- Microsoft has had the foresight to move more aggressively than its traditional competitors in offering cloud-based UXP services.

Challenges:

- SharePoint has not proven to be an optimal UXP choice for organizations seeking support for digital marketing and some other customer-facing scenarios. Customers requiring advanced WCM and digital marketing software more often look to competitors or complementary providers.
- The aggressive move toward the cloud has some downside for Microsoft and its customers. Many SharePoint implementations are heavily customized and integrated with internal, on-premises systems; therefore, they are difficult and/or prohibitively expensive to move to SharePoint Online.
- Incorporation of Yammer has been obscure and, in some cases, redundant with the social capabilities that Microsoft built into SharePoint before the acquisition. Yammer is also an exclusively cloud-based system, increasing complexity for organizations that want to make it part of their on-premises UXP.

OpenText

OpenText brings its rich heritage in content management to the UXP market with a collection of products under the banner "Customer Experience Management." Included are OpenText Portal, Web Experience Management, Tempo (social), Web and Social Analytics, Content Server, Media Management (DAM), InfoFusion (search), Semantic Navigation (search), High Performance Delivery and Archiving. A new product named OpenText Experience Suite, which will become OpenText's primary UXP offering, is slated to become generally available in 1H14. OpenText has powerful, yet complex tools for delivery of high-end websites and portals.

Strengths:

- OpenText exhibits one of the strongest integrations between portal and content management.
- OpenText has a broad portfolio of content products.
- OpenText's UXP has a strong affinity for customer-facing use cases.

Challenges:

- Some products in the suite are not well-integrated, and there are differences among installers, user interfaces and delivery layers.
- OpenText's UXP vision is still being clarified. A focus on digital experiences via the upcoming

OpenText Experience Suite should solidify its vision substantially.

- Many products overlap in functionality, tools are complex and websites require a great deal of "construction," although OpenText hopes to reduce product overlap and complexity with its 2014 initiatives.

Oracle

Oracle's UXP features WebCenter, which is a broad suite that includes Oracle WebCenter Sites (WCM), Oracle WebCenter Content (ECM), Oracle WebCenter Portal, in conjunction with Oracle Social Network. A significant portfolio of the products (Portals, WCM, ECM) that form the suite come from various Oracle acquisitions — BEA Systems, Sun Microsystems, FatWire and Stellent. Further supporting and investing in the UXP vision are solutions in e-commerce (ATG and Endeca), marketing automation (Eloqua), mobility (Mobile Platform), search (Endeca), analytics (Real-Time Decisions) and application integration (IDM, BPM and SOA).

Strengths:

- Oracle has a powerful strategy regarding customer experience, and its UXP is ready to play a key role in that strategy.
- Oracle WebCenter works well for organizations that have an investment in Oracle applications and middleware, because they provide easy integration with their larger portfolio, especially the applications, such as CRM, ERP and e-commerce.
- Oracle has an aggressive road map for providing an end-to-end journey as a customer, employee or partner.

Challenges:

- Oracle's vision and the marketing of its UXP requires better alignment and integration with other initiatives and strategies, especially its customer experience strategy.
- Oracle's UXP is broad, with overlapping functionalities, which can lead to complexity.
- Oracle will appeal more strongly to its installed base with Oracle products more than to non-Oracle shops.

Oxicyon

Oxicyon is a small vendor that has demonstrated a powerful vision for the UXP. Its offering is Centralpoint, a single product targeted for .NET environments. Centralpoint is made up of more than 220 pluggable modules that can be user-selected and encompass various UXP functions. These modules support horizontal capabilities (e.g., collaboration, document management, personalization, search, single sign-on, analytics and mobile), as well as vertical functionality (including advertising, dealer extranet, healthcare, compliance and education). Centralpoint can be delivered in an on-premises or cloud model.

Strengths:

- Oxycyon has a single product architecture that provides a consistent, fully integrated solution.
- Oxycyon's vision of the purpose and architecture of a UXP is one of the strongest in the industry.
- Oxycyon has a broad collection of modules, and its single-product architecture provides off-the-shelf support for a wide variety of use cases.

Challenges:

- Oxycyon is relatively unknown as a vendor, with little visibility in the industry.
- The Oxycyon partner ecosystem is small and is focused almost exclusively on deployment partners, which could significantly limit its scalability and future growth.
- Oxycyon has little prepackaged integration with popular packaged applications.

salesforce.com

Salesforce.com is one of the pioneers in cloud computing. It is a \$4 billion company that built its business initially on SaaS, but later broadened its scope to include platform as a service (PaaS; the Force.com platform), and Web publishing (the Site.com WCM) and social communities. The company continued to broaden its scope by acquiring Buddy Media (social media publishing), Radian6 (social media monitoring), ExactTarget (email and digital marketing), and Heroku (PaaS). Initially, these were all independently developed offerings that were loosely integrated. The company recently launched Salesforce1, representing unified branding and integration of these diverse properties, enabled by a fleshed-out API and more-robust mobile app support.

Strengths:

- Salesforce.com is a \$4 billion company and one of most prominent vendors in the cloud computing sector, with high visibility, a growing ecosystem and a powerful vision of the UXP.
- The mobile capabilities in Salesforce1 represent the second generation of mobile application technology, which promises higher performance and a more-compelling user experience.
- Salesforce.com is especially strong in customer-centric scenarios, where their industry-leading CRM capabilities can be brought to bear.

Challenges:

- In terms of perception, the company is seen as a leader in SaaS and in PaaS, but not in the constituent elements of UXP — portal, WCM and integration.
- Salesforce.com's platform strategy has been more focused on a full application platform (aPaaS) and less about a UXP.
- Integration among diverse properties is still in the first generation and has yet to be proven.

SAP

SAP's portfolio of UXP offerings includes SAP NetWeaver Portal, SAP Jam (for social networking), Web Page Composer and SAP Portal Site Management by OpenText (for WCM), the SAP Mobile Platform,

SAPUI5, SAP Lumira (for analytics) and Hybris by SAP (product information management and e-commerce), and a range of other components and enabling technologies. The renewed set of offerings runs atop SAP Hana, an in-memory database that serves as the real-time platform driving integration, efficiencies and cross component contextualization. Core enabling functionality also includes SAP NetWeaver Gateway, a layer of REST-based APIs geared toward exposing SAP and data processes to a wide range of SAP and third-party user interfaces and applications. The SAP UXP can be offered across different deployment options — on-premises, virtual private cloud (managed) and public cloud — and consumed on multiple devices.

Strengths:

- During the past few years, SAP has developed a strong appreciation for the importance of UX and the platforms needed to support it. Thus, the company has made substantial investments in human resources, programs and methodologies, standards, tools and platforms to better address its customers' pressing UX requirements. UXP has become a priority for this company with a huge influence on the enterprise software business.
- Product highlights include Fiori, Screen Personas, SAP Hana Cloud Portal and SAP NetWeaver Gateway. Together, they signify a shift toward supporting simpler, more-intuitive and more-accessible interfaces for SAP end users, while providing IT departments with better scalability, reliability and interoperability, as well as cloud-based and multichannel support.
- SAP's business application and system of record heritage and foothold give it an advantage in understanding the business processes and roles required to provide context, as well as to measure and track business value.

Challenges:

- SAP has a poor reputation for user experience, so the idea that SAP could provide a compelling UXP is incongruous to many customers. SAP has made many attempts, in the form of products, product enhancements, enabling technologies and/or service initiatives to solve its user experience problems during the past decades, but many have turned out to be dead ends. SAP must demonstrate a consistent commitment to user experience improvement over the long term.
- SAP must clarify its content management strategy. Customers express confusion over SAP's native capability, its relationships with vendors such as OpenText, and the third-party ecosystem of content management providers at large. Use of a partner-provided offering stands out in contrast with SAP's enterprise peers, especially in customer-facing scenarios. The acquisition product information management and e-commerce vendor Hybris may point to a future direction, but a comprehensive strategy remains to be clarified.
- SAP's UXP transformation may introduce short-term problems and confusion for customers using a wide range of legacy offerings. Until recently, SAP's legacy UXP offering was made up of separate systems requiring various levels of custom integration. The newer platform promises to be more unified and integrated, but it remains hard to identify, rationalize, purchase and implement.

Sitecore

Sitecore's Customer Engagement and Experience Platform (CEP), a multichannel marketing and content

management system used to manage customer experiences across digital Web, mobile, social, email, and commerce experiences, is its entry into the UXP market. Although it's normally associated with the WCM market, Sitecore can serve as a foundation for building and managing websites, portals and mobile applications. Sitecore includes personalization, and it incorporates a simple, but versatile means of integrating, aggregating and contextualizing third-party content and data sources. The .NET-based platform includes components that are uniquely valuable for marketing-centric, customer-facing websites such as marketing automation, A/B and multivariate testing, campaign management, personalization, commerce services and community collaboration, along with a wide range of partner-provided components.

Strengths:

- Sitecore's clear strength is in content-centric scenarios with a customer focus, especially those requiring cooperation and coordination between digital marketers and IT groups. Sitecore has substantial momentum and is among the leaders in the WCM market, a position that it could leverage for additional growth and expansion. Customer feedback when the product is used for these scenarios is favorable.
- Sitecore's .NET basis and its ongoing relationship with Microsoft have contributed to its growth relative to competitors, especially when SharePoint falls short of customer needs in content-centric, customer-facing scenarios. Sitecore includes pluggable integration with Microsoft SharePoint, Microsoft Dynamics AX and Microsoft Dynamics CRM, and it runs on Microsoft Azure.
- Sitecore has been effective at tapping into the broader digital-marketing ecosystem, in some cases, building its own capability into the platform (such as marketing automation and campaign management), and in others, providing easily pluggable solutions based on third-party partnerships, such as Sitecore Social Connect, Social Starter Kit (an OEM of Telligent), streaming media capability through Brightcove and Ooyala, and language translation capability through Lionbridge and Clay Tablet.

Challenges:

- Sitecore is clearly and unapologetically focused on the customer side of the UXP market. Although the core WCM capability is sometimes used for corporate intranets or various other scenarios, the lead scenario and product direction are moving more toward marketing-centric user experience scenarios. Prospects looking for a single platform that suits many scenarios may find Sitecore less appealing.
- Sitecore clearly has a broad set of capabilities, but some customers report they're only using the core WCM function, and using other products or vendors to fulfill their UXP needs. Sitecore must continue to work with customers toward more thorough adoption of the platform and its components.
- Sitecore is not well-suited for portal and composite application scenarios.

Squiz

Squiz Suite is an open-source UXP offering consisting of a WCM based on PHP, Search (via Squiz's acquisition of Funnelback), Roadmap (social software), Squiz Analytics, and use of external analytics

providers, such as Maxymiser and Google. Squiz also provides a content delivery network for added performance and personalization across global organizations or deployments via another product, Squiz Edge. Squiz packages technology and consulting services into a single offering that combines open source with cloud/SaaS and commercial off-the-shelf models.

Strengths:

- Squiz is predominantly focused on WCM, but it has enhanced the online experience beyond the core capabilities of WCM through the use of Funnelback.
- Squiz uses gamification techniques to provide an iterative, incremental, experimental approach to drive context awareness.
- Squiz offers a cloud solution that uses a combination of its own data centers and a series of edge notes subcontracted from Amazon and Rackspace, which appeals to organizations that want a managed UXP.

Challenges:

- Squiz is a relatively small vendor with little visibility in the UXP market.
- Squiz relies heavily on consulting and implementation work to realize the true potential of a UXP.
- Squiz needs to increase its partnerships with complementary UXP add-ons, and improve the ability of its software to interoperate easily and smoothly with key adjacent technologies, such as those for CRM, ERP and sales force automation.

Temenos Group

Temenos Group is a recent entrant via the acquisition of edgeIPK in 2012. Its offering is centered on the edgeConnect suite of products, which includes edgeConnect IDE, a website/portal authoring environment aimed at business and IT users working in collaboration; edgeConnect RTE, a runtime server environment; and edgeConnect Mobile, which provides responsive Web capabilities and native shells for iOS, Android and Windows. edgeConnect can be acquired as a horizontal UXP or in vertical bundles for banking, retail and wealth management. Temenos Group focuses its selling strategies on business applications versus horizontal infrastructure.

Strengths:

- Temenos Group has a lean UXP solution providing rapid time-to-value.
- edgeConnect has solid underlying technology, with strong capabilities in codeless integration and mobile support.
- Temenos Group has a solid base of customers in financial services, especially banking.

Challenges:

- edgeConnect has limited functionality beyond content, portal and mobile capabilities.
- Temenos Group lacks visibility in the UXP market and outside the financial services industry

segment.

- Business application centricity may make Temenos Group a suboptimal choice for those seeking simply a horizontal UXP framework.

© 2014 Gartner, Inc. and/or its affiliates. All rights reserved. Gartner is a registered trademark of Gartner, Inc. or its affiliates. This publication may not be reproduced or distributed in any form without Gartner's prior written permission. If you are authorized to access this publication, your use of it is subject to the [Usage Guidelines for Gartner Services](#) posted on gartner.com. The information contained in this publication has been obtained from sources believed to be reliable. Gartner disclaims all warranties as to the accuracy, completeness or adequacy of such information and shall have no liability for errors, omissions or inadequacies in such information. This publication consists of the opinions of Gartner's research organization and should not be construed as statements of fact. The opinions expressed herein are subject to change without notice. Although Gartner research may include a discussion of related legal issues, Gartner does not provide legal advice or services and its research should not be construed or used as such. Gartner is a public company, and its shareholders may include firms and funds that have financial interests in entities covered in Gartner research. Gartner's Board of Directors may include senior managers of these firms or funds. Gartner research is produced independently by its research organization without input or influence from these firms, funds or their managers. For further information on the independence and integrity of Gartner research, see "[Guiding Principles on Independence and Objectivity](#)."

[About Gartner](#) | [Careers](#) | [Newsroom](#) | [Policies](#) | [Site Index](#) | [IT Glossary](#) | [Contact Gartner](#)