

# Magic Quadrant for Horizontal Portals

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Despite a decade-long maturation process, the portal sector continues to evolve. Ongoing changes include lean portals; user experience platforms; social, mobile and cloud capabilities; plus some cross-over of vendors from the content management sector.

## Market Definition/Description

Gartner defines a portal as "a Web software infrastructure that provides interaction with relevant information assets (for example, information/content, applications and business processes), knowledge assets and human assets by select targeted audiences, delivered in a highly personalized manner." Enterprise portals may face different audiences, including:

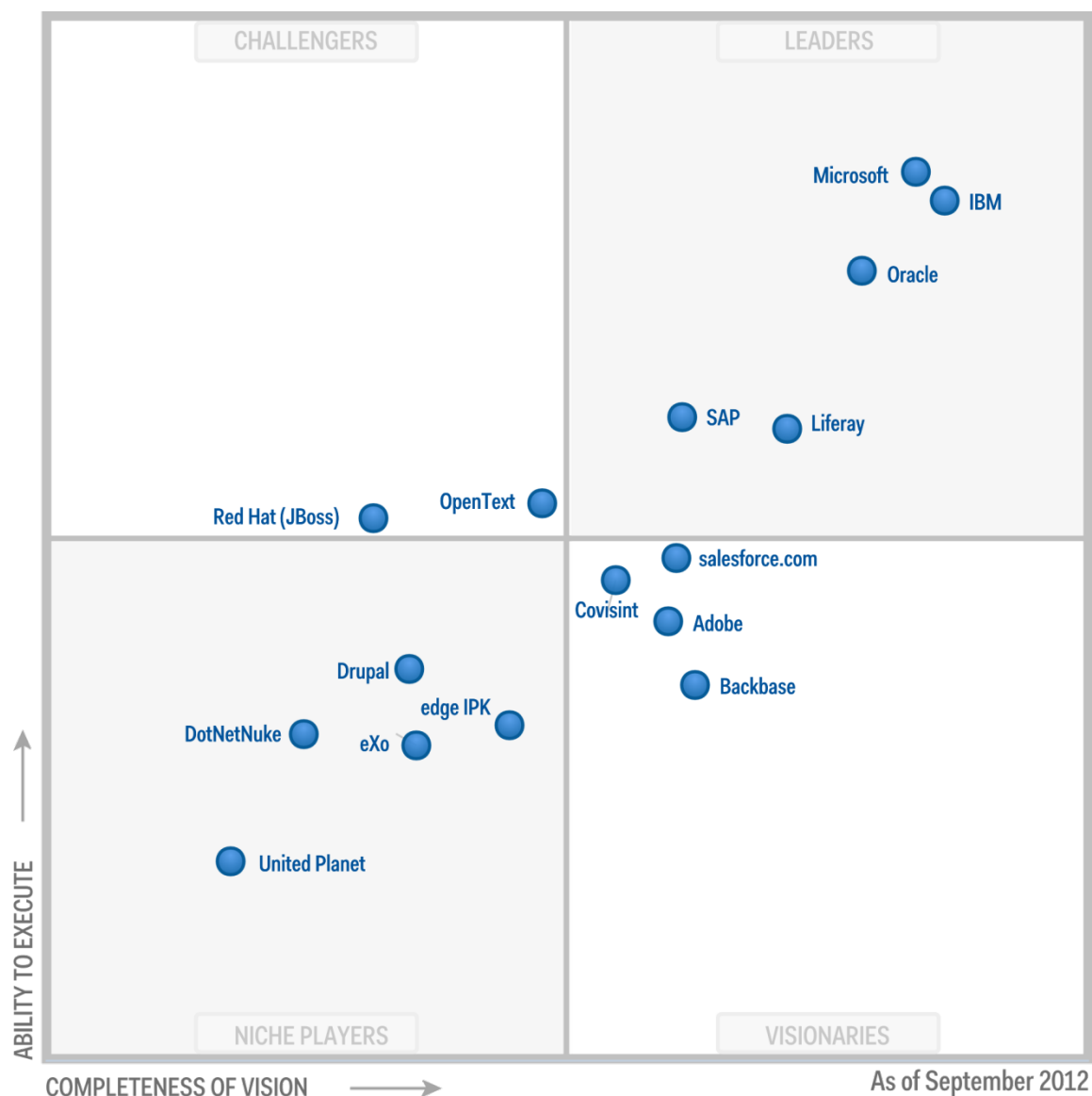
- Business-to-employee (B2E)
- Business-to-consumer (B2C)
- Business partners (B2B)

Of course, the public-sector corollaries to these three high-level audience types are also considered applicable. A portal product is a packaged software application that is used to create and maintain enterprise portals. These products can be used to design vertical or horizontal portals:

- Vertical portals focus on accessing specific applications or business functions.
- Horizontal portals integrate and aggregate information from multiple cross-enterprise applications, as well as specific line-of-business tools and applications.

## Magic Quadrant

Figure 1. Magic Quadrant for Horizontal Portals



Source: Gartner (September 2012)

## Vendor Strengths and Cautions

### Adobe

Well known for its publishing, Web content and digital marketing technologies, Adobe makes its first appearance in the horizontal portal Magic Quadrant. Adobe has significant brand presence based on products such as Adobe Flash, Adobe Acrobat and Adobe Creative Suite, and is a staple in the areas of marketing and creative. Its primary product for delivering horizontal portals, CQ5, came to

Adobe via the acquisition of Day Software. CQ5 was initially marketed as a Web content management (WCM) system and is evaluated in the WCM Magic Quadrant). However, in recent years, Gartner has seen enterprises selecting this package for portal deployments, including B2C and B2E. Beyond being considered as a portal by prospective enterprise customers, the CQ5 package meets the functional requirements for a horizontal portal. Adobe also provides a set of complementary technologies (including analytics, mobile, collaboration and social), and is a major player in the world of cloud computing. Thus, Adobe is an emerging user experience platform (UXP) player.

## Strengths

- Adobe has significant brand value in and outside the enterprise. Adobe Flash has been the tool of choice for years for development of robust websites. The vendor is also broadening its investment in HTML5.
- The Adobe Digital Marketing Suite is considered best of breed for delivering marketing-driven, customer-centric websites and portals, and the tool of choice for online channel optimization.
- Adobe also owns best-of-breed technologies for creative, with long-standing dominance of the design professional tool market, both within enterprises and in agencies, and recently launched Adobe Creative Cloud, a cloud-based software delivery and collaboration service.

## Cautions

- Adobe is a virtual unknown for the delivery of portal frameworks, and must increase its visibility in the marketplace.
- Adobe's primary focus is on creative and digital marketing. While there are instances of Adobe's technologies deployed in B2E and B2B scenarios, the current B2C focus creates the risk of being considered exclusively for B2C scenarios, which would limit the vendor's opportunities within enterprises.
- Adobe has had modest success with establishing a strong presence in enterprise IT, despite years of effort with the LiveCycle product line and widespread adoption of PDF and Acrobat.

## Backbase

Backbase is one of the first portal-less portal vendors, with a focus on user experience and a lean portal architecture. The vendor started out as a small European vendor of client-side JavaScript framework (Ajax library), broadened its focus to include enterprise mashup capability and, in 2008, transitioned to a client-side lean portal. Since then, Backbase has grown and established a presence in the financial services vertical, and in additional geographies (North America). The vendor has fleshed out the lean portal with content, forms, mobile and social capabilities (in 2009 through 2010) and has further matured with UXP-like capabilities in 2012, such as support for targeting, integrated analytics, split A/B testing and online channel optimization. The current offering combines rich customer experience, management, easy personalization, integrated mobile support and an app store (called App Center).

## Strengths

- Backbase is an agile, innovative vendor with a good track record in rich user experience and financial services.
- It has a lean portal architecture that facilitates ease of deployment and time to market. This value proposition combines well with relatively low entry-level pricing, compared with larger competitors.
- Backbase has moved faster than others in its support for UXP capabilities, such as targeting, segmentation, split A/B testing and integrated analytics.

## Cautions

- Backbase is a relatively small vendor, compared with the megavendors in the Leaders quadrant, with limited resources that are stretched across certain geographies (e.g., the Asia/Pacific region). It continues to expand its partner network.
- In the course of customer inquiries, Gartner has heard a few complaints about insufficient support. The data sample size is small, and not necessarily representative of the broad user base. The cause may be twofold: growing pains on the one hand, as the vendor adds coverage to new regions, and product transitions on the other, as the vendor retires its Ajax product line and ramps up portal offerings.
- Backbase has achieved good success in the financial sector, but as yet lacks depth in other verticals. This is not to say that horizontal portals must include vertical-specific features, but that long-term success in the horizontal market depends in part on the ability of the portal vendor to understand and leverage vertical opportunities.

## Covisint

Covisint, a Compuware company, began in 1999 as an e-marketplace for the auto industry and transitioned to a portal platform as a service (portal PaaS) vendor targeting the automotive sector in the early 2000s. Covisint was acquired by Compuware in 2004 and, around that time, expanded from its base in the automotive industry to the healthcare, energy and public-sector verticals. The Covisint platform now services 22 million users, doing 1 billion transactions per year across four data centers worldwide. The software is built on the community edition of the Liferay open-source portal as the technology foundation, as has been done by other vendors in other markets (e.g., Cisco). The Covisint business unit has more than 30,000 customers with annual revenue of \$70 million-plus per year. Notable customers include an automotive online system (6 million users) and a large travel network (8 million users and 20,000 businesses). Covisint sees opportunities in connecting not just people with information, but also objects (such as vehicles) as first-class actors in an online environment. The vendor offers not just a portal stack, but also an integration stack, service consumption stack and identity stack. It is also listed in Gartner's Magic Quadrant for Integration Service Providers.

## Strengths

- Covisint is an early innovator in portal PaaS. The vendor has been cloud-based since its inception, unlike almost all other vendors in the portal sector (except for salesforce.com).
- The portal's strength in identity and access management lends itself to complex supply chain/ value chain scenarios. This capability can be generalized to external communities beyond supply chain scenarios, such as in healthcare.
- The vendor has substantial experience in B2B scenarios and certain verticals (automotive, healthcare and energy). The enabling technology in the Covisint offering includes robust enterprise service bus capability, real-time integration service consumption, adapters for ERP and hospital information systems, etc.

## Cautions

- There is scant track record in intranet scenarios, which is understandable given the vendor's focus on deployments that cross organizational boundaries. However, many deployments require tapping into internal resources in the IT environment, not just external-facing systems.
- The vendor has low visibility in the portal sector, even in scenarios where it has a strong track record (B2B). The reason, in part, is that Covisint offers private-label and private cloud services, which results in a relatively low profile.
- Cloud-based implementation can potentially limit integration with internal enterprise systems, while at the same time facilitating cross-organization interoperability (and the vendor's B2B track record supports that). Cloud-based implementations have natural challenges with regard to the amount of integration with internal systems — especially one-off custom-built applications. Covisint has a solid track record in cross-domain integration, but less so in purely internal-facing systems.

## DotNetNuke

DotNetNuke Corporation is the business entity that is the steward of the open-source package DotNetNuke (DNN). The DNN open-source project dates back to 2002, while the company was founded in 2006 and has gotten several rounds of venture funding. The software is widely deployed in settings that require either a WCM system or an external-facing portal. As with some other open-source packages used for external-facing websites (e.g., Drupal, Joomla and Plone), the feature set does not necessarily fit into a single well-defined conceptual box. The portal-like aspects of DNN include a framework of modules that adds dynamic behavior, such as e-commerce transactions, SMS, subscriber management, event calendars, etc.

The DNN package dates back to v.1.0, the Microsoft ASP.NET platform, and has tracked the evolution of the ASP.NET infrastructure. The DNN community has nearly 1 million registered members and has been widely adopted by Microsoft developers. There are reportedly 700,000 websites running DNN, and the vendor has more than 2,000 commercial customers. The licensees

of the open-source version tend to be savvy IT organizations that need to accomplish a lot with limited IT resources.

## Strengths

- The DNN package is a relatively simple, low-cost, easy-to-implement system that serves basic portal needs along with content management needs. DNN is highly extensible, with an open API that enables the fast, inexpensive addition of commercially supported third-party or custom components. The portal architecture supports multiple portal instances and audiences, as opposed to simple single-project-oriented portals.
- DNN is unique as the premier open-source portal/content management system (CMS) for the Microsoft ecosystem. The software has been able to leverage the strength of the Microsoft technology stack, including the ASP.NET platform, plus software infrastructure for security, active directory services and a large pool of active developers worldwide.
- The value proposition includes a long-standing ecosystem of third-party modules that cover templates, themes and integrations. It has an app-store-like model, which many other vendors are trying to emulate.

## Cautions

- The DNN package has lost some visibility and relative market share, because its appeal to the low end of the Microsoft-centric market has been blunted by the pervasive rise of SharePoint across the market. Also, additional Microsoft-stack-based alternatives have appeared, such as Umbraco.
- Some customers have complained about ease of extensibility, performance and support for globalized, multilanguage portals. This is, in part, due to expectations and skill sets, where customers with modest IT resources may be expecting enterprise-class functionality with consumer-grade ease of self-service configurability — a combination that is rarely found in enterprise software, regardless of vendor. The DNN system is mostly deployed as a self-contained system, rather than one that is integrated to enterprise back-end systems. It is the rare enterprise IT department that makes comprehensive use of DNN.
- Although the ecosystem of third-party modules provides openness and extensibility, many of these are from small providers with limited documentation and support resources. Without these third-party components, the core DNN system provides limited capability relative to leading packages such as SharePoint. For example, DNN lacks advanced attribute-based personalization or context awareness based on dynamic session attributes. These advanced scenarios are not often found in low-end portal deployments, regardless of the vendor.

## Drupal

Drupal is an open-source Web publishing system that has been variously called a CMS, a content management framework and a community-oriented portal. It can be considered a lean portal. The package began as a message board system more than 10 years ago, and is now approaching its eighth major version (Drupal 8). It is in use at hundreds of thousands of sites worldwide — mostly

small organizations, but also some notable sites, such as [www.whitehouse.gov](http://www.whitehouse.gov), The Economist's website, Rutgers University's website and Twitter's developer community site. There are 20,000-plus registered developers updating code on Drupal.org, which gets 2 million unique visitors annually. The yearly conference attracts 3,000 developers. A key aspect of Drupal's value is its ecosystem of 17,000-plus third-party modules (mostly free) that provides functions such as event calendars, e-commerce shopping carts, messaging, maps, search engine optimization (SEO), and project management. The Drupal ecosystem includes a cloud-based service called Drupal Gardens, operated by Acquia, a system integrator that employs some key Drupal developers. Drupal Gardens allows an organization to create not just a single external-facing site, but also to manage hundreds of sites (e.g., Warner Music Group uses Drupal Gardens as a platform for dozens of distinct artist sites, each with its own community and look and feel).

## Strengths

- Drupal is a very prominent open-source package that combines CMS and portal capabilities (such as modular component framework, identity, personalization, etc.) with a significant track record in external-facing Web presences.
- The package has market traction in the vertical sectors of nonprofit, government, education, media and publishing.
- Its ecosystem of thousands of modules allows adaptation to a range of scenarios.

## Cautions

- Drupal is written in PHP, which is not widespread in the enterprise setting. Outside the enterprise, PHP is a proven workhorse language, powering well-known sites like Wikipedia and Facebook, but it has faded in fashion among leading-edge Web developers.
- Complexity in system structure results in a learning curve for developers, compared with packages such as WordPress, which have fewer features, but also are much easier for developers to work with.
- Drupal's ecosystem of system integrators is primarily small firms, although there are pockets of Drupal expertise in established service firms, such as Accenture and Capgemini, as well as nearshore specialists, such as Ci&T (with 300 Drupal developers).

## edge IPK

Based in Europe, edge IPK emerged from the mashup and rich Internet application (RIA) spaces as a portal-less portal vendor. Its edgeConnect product is considered a lean-portal product emphasizing multichannel, multidevice presentation and delivery. Nonetheless, edge IPK is clearly headed toward the emerging UXP market. The edgeConnect product is aimed at leveraging HTML5 more comprehensively to provide support for a wide array of devices, including smartphones and tablets.



At the time this research was published, financial services software vendor Temenos Group announced (on 20 September) that it had acquired edge IPK for its UXP technology.

## Strengths

- The edgeConnect product delivers significant time-to-market advantages, compared with traditional portal offerings. It was one of the early instances of a lean portal.
- The vendor is building a brand name, especially in industry segments such as insurance. It recently achieved some big customer wins in that sector.
- The vendor continues to push the envelope (in comparison with other portal product vendors) in the utilization of HTML5/Cascading Style Sheets 3 (CSS3)/JavaScript, having embarked in this direction well before larger players like Adobe and Microsoft. Edge IPK has also added support for context computing, ensemble programming and next-generation user interfaces (touch, voice and gesture recognition).

## Cautions

- The vendor is still heavily Europe-centric and needs to increase its presence and visibility in other regions.
- The edgeConnect product uses a proprietary HTML-wrapping model for mobile applications, rather than the industry standard Apache Cordova.
- Relative to many portal competitors, edge IPK is a small vendor, with all the associated business risks and growing pains.

## eXo

eXo is new to the horizontal portal Magic Quadrant this year. Its eXo Platform is positioned as an emerging user experience platform as a service (uxPaaS), a UXP in the cloud. The eXo Platform is a Java-centric portal framework with a collection of complementary technologies that positions it in the emerging UXP market. The current product is eXo Platform v.3.5, which offers a portal foundation with portlets, gadgets and single sign-on. On top of this foundation, there is support for content management, workflows, social computing (wikis, activity streams) and a Web integrated development environment (IDE). The system supports multitenancy at the Java Virtual Machine (JVM) level, which means that an organization can deploy one instance of the eXo platform in the cloud to support multiple intranets, extranets and transactional websites.

## Strengths

- uxPaaS is an emerging industry-leading concept, today only represented by the eXo Platform and, to a lesser extent, Microsoft SharePoint Online (via Office 365) and salesforce.com.
- The vendor's relationship with Red Hat provides additional resources from a larger, well-established player, to further the state of eXo Platform.
- The cloud model enables rapid deployment.



## Cautions

- This is a small vendor, focused primarily on European financial services and public-sector clients.
- uxPaaS is so new that the concept is relatively unknown.
- The relationship between Red Hat and eXo regarding development and support of shared portal technology is complex, multifaceted and dynamic. While the relationship is mutually beneficial in the short term, it is not the kind of relationship that has proved sustainable over the long term.

## IBM

IBM has been a longtime leader in the portal market, with its WebSphere Portal product currently in version 8.0. Increasingly, IBM is selling it as a foundational basis for a campaign promoting the "Exceptional Web Experience," and a portfolio geared toward digital marketing efforts, known as the "IBM Customer Experience Suite" and "IBM Intranet Experience Suite." WebSphere Portal is frequently packaged with IBM Web Content Manager v.8.0, IBM Web Experience Factory v.8.0, and IBM Forms v.8.0. WebSphere Portal v.8 delivers out-of-the-box integration of WCM and Portal, integration with Web analytics, integrated mobile support, integrated mashup functionality, and features that make it possible to integrate IBM Connections social services with a few clicks. A planned 1Q13 point release will deliver one install deploying Portal, Web Content Manager and the entitled Connections services.

## Strengths

- Enterprise customers' desire for a broad and versatile set of capabilities to achieve an effective and differentiated experience plays in IBM's favor. WebSphere Portal increasingly serves as the foundation for user experiences that also employ content management, e-commerce, social computing, analytics and a wide range of integration capabilities. IBM is as close as any vendor to a one-stop shop employing portal technology as a foundation for UXP initiatives.
- WebSphere Portal has proven its versatility in providing portals for a wide range of industries and scenarios, involving transactional and static information and business processes, integrating with numerous internal and external systems and resources, and delivering composite or native Web applications. In a macroeconomic context where businesses are risk-averse, IBM has an advantage with prospects embarking on long-term, incremental UXP journeys.
- IBM exhibits strong vision in its recent appeal to business leaders in addition to IT leaders. The strategy has been especially effective in the realm of digital marketing, where business influencers like chief marketing officers (CMOs) and vice presidents (VPs) of customer service must reach consensus with IT leaders to select strategic providers for their customer-facing Web initiatives.

## Cautions

- WebSphere Portal requires considerable design, development and integration investment and expertise (especially in the enterprise Java platform). This is the classic trade-off between full-strength flexibility to meet a wide range of needs versus lightweight, easy-to-implement lean portals. The combination of WebSphere Portal with a broadening portfolio of acquired or developed products may further complicate development efforts and draw IBM further from, rather than closer to, a packaged, easy-to-implement solution. IBM WebSphere Portal NOW, an offering created to help alleviate these concerns (for some customers), serves more as an on-ramp to the product portfolio, rather than an out-of-the-box portal solution for the long term.
- In some ways, IBM is a victim of its own success in the portal market. Many organizations' portal efforts have failed or grown stagnant over time, and, while the reasons are rarely the fault of the portal product or vendor, IBM's strong portal presence is often associated with such failings. An increasing number of Gartner clients are questioning whether their enterprise portals have been worth the time and effort they've put into their design, development, maintenance and upgrades.
- While IBM has managed to retain and gain some customers through marketing what it refers to as "social business," it has lost much of its mind share in the narrower-scope collaboration market with which internal portal efforts are often associated. IBM's portal competition has, in some cases, exploited a focused presence in collaboration to spread out across the broad portal market inside enterprises. Organizations looking for alternatives to traditional portal frameworks are lately increasingly likely to look for specialized collaboration and social software vendors.

## Liferay

Liferay, an open-source company specializing in portal technology, was founded in Los Angeles in 2000. Its flagship product, Liferay Portal, is available as a free Community Edition and as a commercially supported Enterprise Edition, and is currently in release 6.1. Along with the portal technology, Liferay offers an integrated development environment (IDE), Liferay Developer Studio, and a separately available Liferay Social Office. For much of its product history, the Liferay portal has offered a strong value proposition as a lean portal — easy to implement at a low-cost. In recent years, the product portfolio has been fleshed out in the direction of a full-featured UXP.

## Strengths

- Liferay Portal is a lean, highly interoperable, flexible portal product. Functionally complete and, according to customers, low in total cost of ownership (TCO), compared with commercial products with which they've had experience. Liferay's relatively rare support for multitenancy at the portal level gives it great potential for cloud deployments, as demonstrated by partners like Covisint and Cisco.
- Liferay is one of the fastest-growing portal products in the market. The vendor reports almost 70% growth year over year. Moreover, based on customer satisfaction, Liferay appears to have successfully managed growth with minimal negative effects on the quality of service.

- The vendor has a strong worldwide presence, considering the small size of its core organization (approximately 350 employees). The popularity of the platform has recently garnered the attention of global system integrators, supplementing a partnership approach focusing on regional providers. Liferay has also made efforts to expand and leverage its developer, partner and customer communities through training programs as well as its new Liferay Marketplace.

## Cautions

- It remains difficult for a small organization to keep up with other leading portal vendors, which often serve as one-stop shops for all the pieces necessary (including complementary software, services and hardware) to manage portals. Many are moving toward even more-comprehensive UXPs, entailing additional investments in innovative, complementary capabilities, such as analytics and mobility. Larger, commercial vendors with which Liferay is lately competing often have their own business process management (BPM), mobile, integration, enterprise content management (ECM) and cloud services when needed — even if they're not part of the portal.
- Liferay has been slow, relative to some competitors (notably, the smaller, agile vendors such as Backbase and salesforce.com), to offer comprehensive support for mobile portals. It can be challenging for any small organization to offer a defined mobile direction with various factors in flux and far out of the organization's control. Liferay's value must ultimately come in providing a vendor-neutral, standards-based approach, but such standards are in flux.
- Customers report that Liferay's sales organization is less understanding of their needs than more-experienced enterprise software providers. While other vendors are most often disqualified from shortlists for functional shortcomings and high costs, Liferay is most often disqualified because of a failure to understand or align with business goals. Liferay's small, close-knit management and staff is a highly productive team, but its perspective is limited by lack of enterprise experience (tempered by some recent hires).

## Microsoft

Microsoft SharePoint is the most widely deployed portal in the enterprise sector, although the vast majority of use cases are internal-facing, departmental-scale deployments centered around collaboration with Microsoft Office documents. Enterprise portals constitute one of the core capabilities and is a growing use case for Microsoft SharePoint, which seeks to combine a range of once separate software categories to the benefit of enterprise customers. SharePoint blurs the lines between document and Web content management, search, collaboration and social, along with enterprise portal capability. Current offerings under the SharePoint brand include SharePoint Foundation 2010, SharePoint Server 2010 with Standard or Enterprise Client Access Licenses (CALs), SharePoint Server 2010 for Internet Sites, and SharePoint Online, part of Microsoft's Office 365 software as a service (SaaS)-based office productivity suite. Microsoft's vision for the portal is best-expressed with news of the upcoming SharePoint 2013 (previously known as SharePoint 15), which aspires to solidify Microsoft's position as the leading portal provider for the enterprise information worker.

## Strengths

- SharePoint includes more out-of-the-box capabilities for common B2E portal scenarios than most other competitors' products. Historically, portal products were geared toward IT developers and architects, and served as platforms on which to build portals, leaving IT groups and system integrators with the burden of creating or exposing their own functionality and interfaces. While it may not always be advisable to do so, organizations can use SharePoint relatively out of the box. This ready functionality, accessibility and familiarity for business users is one of several factors that has allowed Microsoft to penetrate and pervade the enterprise portal market.
- Microsoft's consolidation of formerly separate software categories makes it an appealing portal offering for a wide range of business initiatives, including those associated with content and document management, collaboration, social, and business intelligence. While SharePoint may not be able to satisfy in-depth requirements in all the areas mentioned, SharePoint's presence in all of these competitive spaces compels many organizations to consider it as the foundation for their enterprise portal framework, even if it gets supplemented with other packages.
- SharePoint's popularity has engendered a third-party ecosystem unlike that of any other provider, including independent software vendors (ISVs), implementation partners, Web agencies, and myriad global and local system integrators. Because SharePoint is so widely deployed, it is an attractive target platform for partners, especially long-standing players in the Microsoft ecosystem. When SharePoint fails to meet all the business or technology requirements for a given initiative, partners are invariably nearby to help.

## Cautions

- The downside of SharePoint's applicability to many audiences, initiatives and disciplines is that it can be challenging for some organizations to consume and refine their use of its intersecting features and functions. The introduction of SharePoint 2013 may represent an unwelcome burden to customers still under way with initiatives based on 2010 or earlier versions of SharePoint. SharePoint 2013 design principles appear to be significantly different, with Web Parts shifting toward tile-based apps that support an off-box execution model. While the new look and feel will be innovative and provide more features, IT organizations and end users may have difficulty adapting to it. Microsoft has stated it will continue to support the SharePoint 2010 development model and user customizations.
- While relief from well-known weaknesses, like problematic customization, multisite management, mobile support and multilanguage support, may be on its way in SharePoint 2013, customers will have to wait to check their worth. In the meantime, the many organizations looking to build sophisticated, differentiated, global customer-facing websites will have to rely on third-party products and consulting expertise.
- Organizations considering the cloud-based SharePoint Online offering should be aware that it may not be a suitable platform for horizontal portals in the enterprise. While it may serve as an internal platform for collaboration and lightweight document management, support for multiple sites and external sites is lacking, and customization and integration with a variety of internal and external systems is problematic. Organizations considering SharePoint Online for use as a

horizontal portal, whether as a new portal initiative or as a replacement, should assume limitations in SharePoint that will need to be addressed through other means, such as hybrid cloud/on-premises deployments (a difficult challenge for most organizations).

## OpenText

OpenText Portal 8.2 is part of OpenText's Customer Experience suite of products, which includes Web content management, social media, digital asset management, and mobile delivery, in addition to portal capability. OpenText Portal serves as a means to create and manage user experiences across a range of ECM and BPM initiatives at OpenText. The portal product began as one of the pioneering enterprise portal products in 1998 from Epicentric, a vendor that was acquired in 2002 by Vignette, which was itself acquired by OpenText in 2009.

## Strengths

- OpenText offers strong integration between its portal and WCM offerings. In general, portal and WCM integration can be problematic for organizations because it can create redundancy, conflict and complexity in functions like personalization and page templating. OpenText's portal's proven, native integration with OpenText Web Experience Management, is especially suited for portals requiring advanced content management and online channel optimization.
- OpenText exhibits a strong vision in employing OpenText Portal as a composite environment for its wide range of customer experience management technologies, such as WCM, social, mobile, digital asset management (DAM) and cloud file sharing, as well as ECM and BPM technologies. OpenText Portal integrates with OpenText Content Server via a library of portlets exposing all of Content Server's document management and collaboration capabilities within the portal context. OpenText also provides a comprehensive set of archiving and records management capabilities.
- OpenText Portal is distinctive in its support for dynamic personalization and context awareness, as it enables its end users to create targeted, contextual and one-to-one personalized user experiences. Beyond traditional segmentation, OpenText Portal offers real-time dynamic segmentation of visitors/users using advanced features and behavioral targeting capabilities, from out-of-the-box, integrated Web and social analytics modules, to allow organizations to better understand their customers and provide contextual value.

## Cautions

- In Gartner's view, OpenText Portal has lost momentum in the portal market; in terms of market and mind share, it is growing at a slower rate than many of its competitors. OpenText appears less often on customer shortlists for enterprise portal efforts than other vendors, and many current customers are considering replacing the product. Customer perception is that the pace of development has slowed.
- While OpenText remains well-regarded and recognized for its content management capabilities, it has yet to reassert its past role as a leading platform for enterprise portals. Portal capability

seems to be buried beneath solution marketing efforts, making it hard for customers to determine whether OpenText Portal is a stand-alone product for customers or whether it's becoming an enabling technology for a broad array of OpenText products.

- OpenText's strong partnerships with enterprise powerhouse vendors like SAP, Microsoft and Oracle are not as effective in the portal space as they are elsewhere in Web content management, document management, DAM and archiving. This is because all these partners have their own, highly competitive portal platforms.

## Oracle

Oracle WebCenter Portal 11gR1 is a core capability of Oracle WebCenter, a suite of products encompassing an increasingly unified engagement platform for employees, partners and customers. In addition to Oracle WebCenter for self-service portals and application dashboards, customers can use Oracle WebCenter Sites for Web experience management, Oracle WebCenter Content for ECM, and Oracle Social Network for social networking and collaboration. After several years of adding unrelated portal products to its portfolio (reaching a high-water mark of seven portal packages), and the ensuing customer confusion, Oracle has made strong efforts to rationalize and consolidate its diverse portal product line, while supporting customers still using legacy portal technologies, such as the WebLogic and WebCenter Interaction portals from the BEA Systems acquisition, as well as portals from the PeopleSoft, Sun Microsystems and Siebel acquisitions. Going forward, Oracle WebCenter Portal will also serve as the unifying interface and composite application framework for its Oracle Fusion business applications.

## Strengths

- Oracle WebCenter can leverage more go-to-market angles and appeal to more IT and business audiences than most smaller competitors. In addition to appealing directly to portal requirements, it can leverage its traditional security, database and middleware strengths; its presence in a variety of core business applications (human capital management [HCM], ERP, CRM, supply chain management [SCM], business intelligence [BI]), commonly integrated with portals; its vertical strengths in utilities, retail, healthcare and life sciences; and its acquired heritage supporting customer-facing websites and other content management implementations. Also, Oracle WebCenter provides the UXP for Oracle Fusion applications.
- In recent years, Oracle has made considerable progress in defining, communicating and adhering to a coherent strategy and road map for its portal and UXP customers and prospects. Customers are showing less confusion about the stated path and they are no longer hearing mixed messages from the Oracle organization. This clarity of message is instilling more confidence in Oracle as a strategic provider of portal, content management and related capabilities.
- Oracle is the only one among the large providers to be deemed a Leader in both the Magic Quadrant for Horizontal Portals and the Magic Quadrant for WCM markets. Oracle is also present in the Magic Quadrant for Enterprise Content Management.



## Cautions

- Recently, Oracle has placed strong emphasis on Web engagement management (its WebCenter Sites product is chiefly focused on B2C website and digital marketing initiatives) and, by comparison, its message to companies seeking B2E and B2B solutions seems muted. While we've criticized others for not having enough focus on this market opportunity, Oracle may be swinging too far in the other direction. Moreover, although Oracle exhibits leadership in both the portal and WCM markets, the integration between its products is still under way.
- Gartner client activity suggests that a subset of Oracle portal customers, especially those using legacy portal products, are considering moving toward competitive solutions, rather than pursuing the path toward Oracle WebCenter. Concerns cited include cost of development, with some customers required to reskill staff to support WebCenter's somewhat specialized standards and methodologies. While the bulk of the outflow occurred in the year after the acquisition, among BEA AquaLogic User Interaction customers who were committed to the .NET platform, a small, but steady outflow remains.
- Oracle lags behind other Leaders in enterprise collaboration and social initiatives that are often part of a broad portal strategy. The BEA acquisition brought to Oracle some innovative technologies and concepts (based on the Plumtree Software product line) that were unmatched at that time in the market. However, Oracle did not leverage these properties to attain a solid foothold in enterprise social computing. The Oracle Social Network is the latest attempt and it's a fledgling effort and not yet widely adopted. Customers don't typically associate the Oracle brand with social or collaboration capabilities.

## Red Hat (JBoss)

JBoss is Red Hat's middleware division, which offers JBoss Enterprise Portal Platform (EPP) v.5.2.1, released April 2012. As an add-on subscription to JBoss EPP, Site Publisher (powered by eXo) is offered to empower business users to manage their own sites and content. GateIn is now a joint open-source project with eXo and both vendors will share a common community code based on JBoss.org. Red Hat's open-source qualities often lend themselves to lean-portal initiatives, although they're trying to target both lean and UXP deployments. Thus far, the EPP portal is primarily used by organizations that are heavily committed to the JBoss Application Server platform.

## Strengths

- Red Hat is a well-known leading enterprise open-source vendor that is growing rapidly and has established its visibility among large organizations and system integrators that have availed themselves of JBoss to offer their own, often industry-specific solutions.
- JBoss tends to favor larger organizations with substantial, innovative IT departments and a smaller budget for software license acquisitions. For these organizations, it can be flexible to support systems requiring custom development, unique security rules, and the mixing and mashing of different frameworks.



- Red Hat has assembled an integrated portfolio of infrastructure, such as its OS platform (Red Hat Linux), virtualization or cloud, and supporting middleware technology, such as BPM, security or storage, which enables the vendor to make strides toward providing multiple critical solution components to help organizations achieve a tighter deployment.

## Cautions

- Red Hat has strong roots with the Linux and developer community, which lends a certain stability, but also has led it to become something of a commodity, rather than innovating ahead of the demands of the market. The portal tends to be used mostly by existing users of the JBoss Application Server platform. There is value to enterprises with skilled in-house developers or to those that have good leverage with certain system integrators, but organizations with strong expectations of immediate business usability may find the combination unnecessarily burdensome. Depending on the staff skill set, there can potentially be a higher TCO.
- The relationship between Red Hat and eXo regarding development and support of shared portal technology is complex, multifaceted and dynamic. While the relationship is mutually beneficial in the short term, it is not the kind of relationship that has proved sustainable over the long term.
- JBoss Portal lacks the mind share in the portal market that one might expect from a provider of Red Hat's size. It does not frequently appear in vendor selection shortlists, although there are some organizations that are drawn to it due to perceived low startup costs. Some customers treat JBoss Portal as a low-cost tactical choice, while others report that any savings in software acquisitions are expended on relatively higher integration and implementation costs.

## salesforce.com

Salesforce.com is a renowned SaaS provider and a multi-billion-dollar company that is a pioneer in cloud computing and continues to expand its scope into PaaS, social media management, advertising management and portals. Large global enterprises are using salesforce.com's portfolio of offerings to build robust portal solutions addressing B2E, B2C and B2B scenarios. Examples of B2B portals include Dell.com, reaching 44,000 partners; VMware, with 160,000 partners globally; Symantec; Red Hat and Avaya. B2C portals include Kelly Services, Electronic Arts and Zynga. B2E customers include Facebook, GE and Burberry. In addition, salesforce.com has a presence in the public sector, nonprofits and higher education, including the New York City Department of Education and the Stanford University School of Medicine. Despite these success stories, its portal capabilities continue to be well-hidden from many prospects in the market, even those familiar with its SaaS portfolio.

The vendor's portal offerings consist of Site.com, Force.com (its PaaS) and Chatter (its social computing cloud service). These subsystems, in combination, can functionally comprise a full-featured portal in the cloud. While currently implemented mostly as a lean portal, as more critical business applications move to the cloud, it will serve as a UXP for some organizations.

## Strengths

- The vendor's strengths in social and mobile computing provide a nice complement to its portal framework. The vendor has been able to roll out leading-edge functions in mobile and social more quickly than most other players in the portal sector.
- Its portal platform offers ready alignment with important enterprise applications, especially CRM and customer service, which are already hosted by salesforce.com. As it extends its business application footprint, salesforce.com will provide a compelling case for customer- and supplier-facing portals running on its platform.
- The cloud model leads to rapid time to market, and the "clicks, not code" approach to portal construction resonates well with the business. The cloud model also favors a high-quality user experience, because the product needs to win the battle for user adoption on an ongoing basis, month to month and subscriber to subscriber.

## Cautions

- The vendor continues to underplay and underpromote its portal capabilities.
- The capabilities of salesforce.com's portal offering are limited in areas like personalization and content management, compared with many of the full-featured, suite-oriented vendors.
- The combination of Force.com, Site.com and Chatter as a portal offering is relatively new, so the track record is only now starting to accumulate.

## SAP

SAP NetWeaver Portal, now in version 7.3, has a heritage as one of the oldest portal products in the market, dating back BEA AquaLogic User Interaction to TopTier (a portal vendor acquired by SAP in 2001). In the early days of the portal market, SAP articulated a compelling vision of a portal as a broad-scope enterprise platform for dynamic business content. Unfortunately, much of this vision remained unrealized for most of the past decade. Most organizations deployed the SAP portal as a straightforward Web access mechanism for SAP business applications, despite loftier goals. During the past year, there has been significant change under way at SAP. SAP NetWeaver Portal has become a central element of the vendor's broad and ambitious strategy to improve user engagement while exploiting social, mobile, cloud and big data trends. SAP NetWeaver Portal 7.3, the latest version, was released in July 2011 and makes performance, interoperability, customization and usability enhancements over prior versions. SAP NetWeaver Portal is not sold separately, but instead is part of the SAP NetWeaver platform license.

## Strengths

- SAP's vision, commitment and road map for the evolving portal market have improved significantly over the past year. In the road map, SAP NetWeaver Portal has become part of a comprehensive and ambitious strategy to improve SAP user engagement in light of emerging trends like social, mobile, cloud and information.

- SAP is a large established vendor with a large market share in enterprise applications such as ERP, HCM, CRM, SCM and BI. Because SAP acts as the system of record for core business information and processes for many large organizations, many customers are compelled to make use of SAP NetWeaver Portal, even when it's in conjunction with another portal platform, like Microsoft SharePoint, IBM WebSphere Portal or Liferay Portal.
- Fundamental developments at SAP, inside and outside the NetWeaver stack, should help extend portal interoperability and flexibility. For example, SAP NetWeaver Gateway enables SAP applications to share data by exposing them as REST-based OData services, while Hana's in-memory analytics capability could serve in the longer term to bring improved portal automation, relevance and responsiveness.

## Cautions

- SAP has shown less inclination than its competitors to support external marketing or service-centric customer and consumer portal scenarios. Recently, organizations are finding that portals can deliver significant business value in customer-facing scenarios, and several of SAP's competitors have been quicker to recognize and exploit the trend. While SAP has made some licensing and packaging accommodations for B2C efforts, and has partnered with OpenText for some of the required content management capabilities, it has not taken a strong position in what could be the portal market's most lucrative opportunity. Moreover, the partnership with OpenText might be limiting to customers with established relationships with other content management vendors.
- SAP NetWeaver Portal has long suffered from a poor reputation for usability and flexibility, and many customers have given up on NetWeaver Portal for purposes outside of SAP application aggregation and delivery. While SAP has taken steps to improve these factors through capabilities like Web page composer and add-ons like Enterprise Workspaces, portal customers have already moved to other providers to address the issues. For many customers, NetWeaver Portal has already been relegated to the role of a means of surfacing SAP information and applications, rather than being a true portal front end.
- Despite improvements in interoperability — especially with SAP NetWeaver Gateway, support for OData and a commitment to the still-emerging HTML5 — customers should exercise caution about buying completely into the SAP stack. SAP's expansion into mobile and database technologies could create new levels of lock-in for unwary enterprises.

## United Planet

United Planet is a portal vendor founded in 1998 in Germany that has 4,000 customers worldwide, primarily in the small or midsize business (SMB) sector, with a total user population of 500,000. One differentiator is the low price. United Planet offers Intrexx Compact, a five-user edition of its portal for the unusually low price of \$350. There is a higher-priced Professional Edition, as well as "Intrexx for rent," which carries a monthly fee and can run either in the cloud or with a hosting partner. These are priced comparably to other portal products. Another differentiator is a visual development environment that can create interactive applications without coding. The software is written in Java and, therefore, can run on a wide range of server platforms. The Intrexx package offers integration

to enterprise IT systems such as Lotus Notes, SAP Business One, OData, SAP NetWeaver Gateway and any Java Database Connectivity (JDBC)-based data sources, which is unusual for a low-cost package.

Recently, United Planet added support with mobile and social capabilities, in keeping with broad industry trends.

### Strengths

- The portal product has a low cost for base-level SMB capability.
- It is easy to implement and integrate with a few major enterprise systems. It also offers out-of-the-box capabilities for common scenarios.
- Visual tools allow the development of workflows with minimal coding.

### Cautions

- This is a small vendor with limited resources that has reached 100 employees after 14 years.
- As with many out-of-the-box systems, although simple portal administrative and development functions might be relatively easy for power users, custom development and design may prove more challenging.
- United Planet has little market visibility outside its primary geographic region.

### 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 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

Adobe, eXo and United Planet were added to this year's Magic Quadrant.

#### Dropped

Tibco Software was dropped from this year's Magic Quadrant.

## Inclusion and Exclusion Criteria

To be considered for this Magic Quadrant, vendors must meet a combination of criteria. They need to provide technology that supports deployment in a variety of scenarios, including employee, customer-/constituent-facing and partner portals.

- The vendor must provide the following capabilities:
  - A container or framework and component model (i.e., portlets or a similar model)
  - Security administration, including the ability to manage security rights and privileges by individual, group or role, such as single sign-on
  - The ability to integrate with a wide range of data sources, applications, content and services via various mechanisms, such as enterprise service bus, REST, RSS, Web services, iFrames and screen scraping
  - Personalization, including the ability to direct relevant content and information to individuals, groups and roles; to change the content and behavior of page components, pages or page groups; and to provide end-user customization (personalization may be driven by any number of static user-centric attributes, dynamic session-centric attributes, collaborative filtering or social relationships)
  - Content management, including the ability to create, organize and publish content in the context of the portal, as well as search and content aggregation
  - BPM, including some means of providing or integrating with workflow and BPM tools or platforms
  - Support for multichannel and multidevice delivery and presentation
- The vendor must provide sales and support for the portal product in at least two of the following five geographic regions: North America; Latin America; Europe, the Middle East and Africa; Japan; and the Asia/Pacific region.
- The vendor must support clients in more than one industry vertical.
- The vendor must have achieved one of the following:
  - At least \$4 million in annual portal-related product and service revenue in the most recent calendar year or fiscal year
  - An installed base of at least 100 enterprise customers

## Evaluation Criteria

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### Ability to Execute

Enterprises evaluating horizontal portal technologies have wide-ranging requirements for different audiences. A breadth of functionality supporting different portal deployment scenarios, long-term vendor viability, a demonstrated track record of meeting customer needs and a successfully

expanding market presence are all important criteria for the Ability to Execute in this market. A vendor that may not be rated highly in terms of its Ability to Execute in the general horizontal portal space may still provide compelling or leading-edge functionality supporting a particular portal deployment scenario or companies in a particular industry.

**Product/Service:** This criterion addresses technology providers' core portal offerings. Assessments in this area include focus on essential portal functions, usability, scalability, manageability, security and ease of deployment.

**Overall Viability (Business Unit, Financial, Strategy, Organization):** Overall 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 to invest in the product. Gartner also considers the vendors' likelihood of advancing the state of the art for portals in the organization's product portfolio. Assessments of the organization's cash and equity position, management, and financial strategy are weighed.

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

**Market Responsiveness and Track Record:** This is the vendor's 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 considers the provider's history of responsiveness or its track record in the portal space. It also weighs the range and level of success among large enterprise customers using the portal offering.

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

**Customer Experience:** This criterion includes the vendor's relationships, products and services/ programs that enable clients to be successful with the products evaluated. Specifically, it includes the ways customers receive technical support or account support. This can include ancillary tools, customer support programs (and the quality thereof), availability of user groups and service-level agreements.

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

Table 1. Ability to Execute Evaluation Criteria

| Evaluation Criteria  | Weighting |
|--|-----------|
| Product/Service  | High      |
| Overall Viability (Business Unit, Financial, Strategy, Organization) | Standard  |
| Sales Execution/Pricing  | Standard  |
| Market Responsiveness and Track Record                               | High      |
| Marketing Execution  | High      |
| Customer Experience  | High      |
| Operations   | Standard  |

Source: Gartner (September 2012)

## Completeness of Vision

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

**Market Understanding:** This criterion addresses the ability of the technology provider to understand buyers' needs and translate these needs into products and services. Vendors that show the highest degree of vision listen and respond to buyers' current demands, while responding to emerging needs. This criterion includes the vendors' vision for portal technology and for incorporating Gartner's Generation 6 and Generation 7 functionality (see "Generation 7 Portals: Unifying the User Experience" [Note: This document has been archived; some of its content may not reflect current conditions.]).

**Marketing Strategy:** This criterion deals with a clear, differentiated set of messages consistently communicated throughout the organization and externalized through the website, advertising, customer programs and positioning statements. A clear marketing strategy is increasingly important in the portal space to differentiate between horizontal portal offerings and other approaches to building Web presence.

**Sales Strategy:** This is 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. In situations in which the vendor offers more than one portal product — or a portal product in addition to products offering alternative approaches to building Web presence — avoiding channel conflict is important.



**Offering (Product) Strategy:** This criterion addresses a technology provider's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature set as they map to current and future requirements for integration, standards support, collaboration, development environment support, personalization capabilities, architectural evolution and feature enrichment. The vendors' abilities to effectively benefit from the open-source movement are also considered, although this can take forms besides offering a portal under an open-source license.

**Business Model:** This is the soundness and logic of a technology provider's underlying business proposition.

**Vertical/Industry Strategy:** This is the technology provider's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments and vertical industries.

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

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

Table 2. Completeness of Vision Evaluation Criteria

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

Source: Gartner (September 2012)

## Quadrant Descriptions

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### Leaders

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

### Challengers

Challengers in this Magic Quadrant demonstrate significant ability to execute, but lack the degree of portal-specific vision demonstrated by market leaders. Red Hat (JBoss) and OpenText are Challengers.

### Visionaries

Visionaries in this year's Magic Quadrant demonstrate a firm grasp of emerging customer needs and the potential impact of new technology. Covisint and salesforce.com are ahead of much of the market in providing cloud portal services. Backbase has focused effectively on providing a lean portal, while employing new mechanisms for interoperability and meeting the demand for better user experiences. Adobe enters this Magic Quadrant as a Visionary.

### Niche Players

The Niche Players in the horizontal portal product market focus on a limited set of portal deployment scenarios, have a limited geographic presence outside their home markets and/or focus on a narrow set of industries. DotNetNuke and Drupal entered the Magic Quadrant in 2011 as open-source providers that typically start with a content management proposition; however, both have fundamental portal capabilities. Edge IPK is a small provider with a horizontally capable lean-portal platform. eXo and United Planet enter the Magic Quadrant in this sector.

## Context

Portals are personalized points of access to relevant information, business processes and people.

They bring value to three major audiences:

- End users get unified access across previously siloed content via a consistent user interface and authorization mechanism.
- Business organizations get a unified place to engage, support, learn from and respond to their customers and other audiences.

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

## Market Overview

### Trends in the Portal Sector

In the 2011 to 2012 time frame, the portal market continued to evolve along trend lines set in years past:

- Lean versus heavy bifurcation; lightweight, easy-to-deploy portals versus full-featured suites
- UXPs
- Enterprise social computing
- Mobile support
- Cloud
- Convergence with content-management
- Portal as platform
- Stepping back from the portal label

Some of these trends are part of the broad industry dynamics under the Nexus of Forces identified by Gartner (see "The Nexus of Forces: Social, Mobile, Cloud and Information"). Along with the Nexus of Forces, most of these trends represent steady continuations from past years (UXP, bifurcated portal market, portal as platform). There is one trend that has been in place for a long time, but that has ramped up significantly during the past year — the convergence of portals and WCM.

### Lean Portals Versus Portal-Based Suites

The bifurcation in the portal market was still very much in evidence. It refers to portal products that gravitate to two ends of a spectrum:

- On the one hand, full-featured, but complex broad-scope products — heavy-duty suites built on portal technology, but going beyond it
- On the other hand, lightweight easy-to-deploy, narrower-scope lean portals

These two ends of the spectrum remain, albeit with some blurring of the lines due to some amount of crossover and movement by vendors toward both ends of the lean versus heavy spectrum.

## UXPs

The evolution and emergence of portals centered around the UXP concept continued. UXPs provide an integrated set of technologies that support the authoring, design process, management and delivery of rich experiences across Web channels and multiple mobile platforms. This integration can take the form of a collection of separate, yet integrated products that can be packaged as a suite or as a single product.

UXP is still a nascent market, and the pace kept by portal vendors in moving in the UXP direction remained slow and steady, rather than experiencing explosive or disruptive growth. There remains among many vendors a lack of awareness of the importance of directly supporting well-known best practices in design process (analytics, split A/B and multivariate testing, persona modeling, etc.). Some of what vendors label as UXP is simply bulking up a portal package with diverse, unrelated features. This can be termed "UXP-washing," and is analogous to the cloud-washing phenomenon in the cloud computing sector.

## Enterprise Social Computing

The ongoing socialization of enterprise information systems continued at a strong pace. Much of this activity occurred outside of the portal sector, in terms of point solutions or social-centric offerings from vendors such as Jive, Lithium, Mzinga and Telligent. Portal products participated in this wave, adding social features like activity streams, social profiles, social objects, contextual chat, etc., if they did not already have these. Some organizations rely solely on a portal to meet social computing requirements. Other organizations eschew a portal and instead rely on a best-of-breed point product. There is also a sizeable segment of organizations that does both: they implement a portal, but have it work side-by-side or underneath a best-of-breed social package — despite significant overlap between the two packages. Regardless of approach, success can be elusive, as much due to nontechnical factors as to technologies and products.

## Mobile

Portal packages have incorporated mobile support for more than a dozen years (in the form of mobile access gateways and transcoding), but, for much of the past decade, this capability has lain dormant in most portal deployments.

In recent years, the picture changed with the explosive growth in mobile device use within enterprises. Enterprise IT managers are challenged to support diverse smartphone and tablet platforms, as part of consumerization and bring your own device (BYOD)/technology/app trends.

Portal vendors are well-aware of this disruptive phenomenon, and have marshaled resources to support a highly dynamic sector populated by diverse, fast-changing platforms and form factors. The results have been mixed or of modest success, with the exception of a few fast-moving vendors. At the moment, good support for mobile platforms and multiple form factors remains a competitive differentiator in the portal space.

Trends in mobile development keep shifting, so any advantage in one area may be short-lived. For example, in 2008 through 2010, the primary focus of mobile development (in the broad context, not

just with regard to portals) was on coding native apps — initially iOS and later Android. As platforms proliferated, the native code phase was followed by exploration of cross-platform development tools, with many mobile developers settling into a hybrid native/Web approach, in which core functionality in HTML/JavaScript code is packaged inside a native code wrapper using Adobe PhoneGap (or its open-source counterpart Apache Cordova).

The latest trend in mobile development is experimenting with integrated multi-form-factor approaches, now called "responsive Web design." This latest approach relies on the media query capability in CSS3 to allow conditional formatting based on the resolution of the target device. Although experiencing strong growth among Web developers, responsive Web design is only supported by a few portal vendors. This situation will likely improve significantly through year-end 2012 and into 2013. At the moment, support for responsive Web design is a competitive differentiator among portal vendors.

## Cloud

The broad-based industrywide shift to cloud computing has been in motion for five years and continues to roll through the industry. In the portal sector, cloud-based SharePoint Online (part of Office 365) has attained a visible position in terms of mind share, despite architectural limitations, by leveraging the large market presence of the on-premises version of SharePoint. In the late 1990s and early 2000s, some portal vendors experimented with hosted portal offerings — the precloud application service provider (ASP) model. Of that generation, only Covisint remains as an entrant that has evolved into the cloud era and is making headway in different verticals. One other provider that has been cloud-based since its inception is salesforce.com, which early on established a leading position in SaaS (in the sales force automation and CRM categories), and later added platform capabilities that, in conjunction with social and content management, equip the vendor to meet enterprise portal requirements.

Cloud is not just a deployment model with many nuances (see "Five Ways the Cloud Is Rolling Into the Enterprise Portal Market"). Rather, the cloud is becoming an unavoidable part of the environment upon which portals must provide their services (relevance, personalization, etc.). That is, portals must provide users with a unified, personalized point of access to resources that are strewn across the cloud.

Portal PaaS has been somewhat problematic for vendors (see "The Rise of Portal Platform as a Service: The Vendor View") and for customers (see "The Rise of Portal Platform as a Service: The Customer View"). Yet, cloud capabilities represent a major disruptive factor in the portal market, lending opportunities to new entrants while representing a competitive threat to some established players.

## Convergence

Portal products overlap with other categories of enterprise software infrastructure, from identity management to BPM to application integration. However, the largest overlap is with WCM systems. In recent years, the natural affinity between WCM and portal categories has deepened and, in the case of some vendors, has become fully converged.

CMSs center on the process of creating content and editing, revising, approving, versioning and deploying it, supported by mechanisms such as presentation templates, content repositories and identity management. Portals use similar technologies and mechanisms, but center more on the process of delivering content — to the right person at the right time on the right device, in a personalized manner — and also on the problem of aggregating content from diverse sources, including dynamic content from business applications.

Packages such as SharePoint, Drupal, DNN and Adobe CQ5, while different in many respects, illustrate how a subset of the two related categories of WCM and portals can be supported on a common technology platform. This trend will continue, modulated by related trends, such as lean portals, UXPs, online channel optimization, etc.

In this horizontal portal Magic Quadrant, packages with a WCM or CMS heritage were included for two reasons:

- Functionality has evolved to support dynamic content delivery, personalization, identity management, component frameworks and other capabilities that were formerly only found in portals.
- Gartner received more inquiries regarding these packages in competitive face-offs with well-known portals (i.e., IT managers were facing a decision to choose Drupal versus SharePoint, DotNetNuke versus Liferay, etc.).

## Portal as Platform

For years, portals have provided the high-level software infrastructure that application developers could, in theory, use to build powerful, robust, enterprise-class applications: presentation management, identity management, content publishing, personalization engine, application integration, component framework, unified search, integrated development and administration tools, etc.

Gartner first wrote about the exciting potential of portal as platform in 2006. The notion of a portal platform differs from the UXP concept described earlier. UXP emphasizes the design and management of user experience, while portal as platform does not necessarily require an integrated presentation layer.

More recently, there is a vision emerging related to portal platforms — one that views portlets as analogous to apps, and views a portlet repository as a kind of enterprise app store. While there is exciting potential in these new concepts, the reality of portal as platform has been more modest progress. It has been hindered by the cost and complexity of many enterprise portal packages, especially those in the heavy-duty or suite-based portal category. App-store-like distribution of portlets remains in the early stages.

## Stepping Back From the Portal Label

During the past few years, there has been something of a retreat from the portal label. Packages such as SharePoint and WebCenter have shied away from using or emphasizing the word "portal"

in their product names. This is, in part, due to the natural tendency for marketing staff to seek out novel ways of presenting familiar concepts, favoring new coinages rather than undifferentiated standard vocabulary. It is also perhaps because portal deployments have a mixed track record in many organizations. In many projects, expectations were raised, potential benefits were oversold, and considerations of cost and complexity were not fully examined, leading to results that are anticlimactic and, in some cases, disappointing. The consequence is that even the vendors that continue to use the term rarely march behind a portal banner anymore (see "Four Key Aspects of the Portal's Death (and Rebirth)").

Despite the term's loss of luster, the problems that portals intend to solve will remain as ongoing issues for most enterprises, including:

- How to better enable people to communicate and collaborate
- How to provide unified access to dynamic content from business applications
- How to break down silos of content, and deliver information effectively through context-driven personalization

Portal packages won't solve 100% of these problems in a manner that is both fast and inexpensive, but that is because these challenging problems are not easily solved. Other solutions (in the categories of enterprise social computing, collaboration, presentation management, etc.) will only address part of the problem or, alternatively, will encounter the same challenges faced by portal products.

Although the popularity of the portal label may go in and out of fashion, the problems to be solved by portal-like technology will remain ongoing challenges for enterprises, and the field of potential solutions will continue to expand.

## Stable Vendor Population

In this year's horizontal portal Magic Quadrant, there are 16 vendors included. The portal market began in the late 1990s and quickly blossomed to 100-plus vendors in the early 2000s. The sector then went through a period of evolution and maturation, and, as has occurred with most sectors, a natural process of consolidation and acquisition, reducing the number of vendors to about two dozen of note, of which less than a half-dozen are in the Leaders quadrant.

In the past year, it appeared that the portal market would widen, with new entrants in emerging categories such as UXP, portal cloud services, client-side or lean portals, etc. This trend has leveled off since the 2011 edition of this Magic Quadrant. The main change to the vendor population has been the arrival of entrants from the WCM space, due to the convergence phenomenon discussed previously. That sector has resisted consolidation in that new packages and vendors regularly emerge. It is possible that WCM will continue to supply new entrants into the portal sector through the next several years.



## Recommended Reading

*Some documents may not be available as part of your current Gartner subscription.*

"Magic Quadrants and MarketScopes: How Gartner Evaluates Vendors Within a Market"

"Four Key Aspects of the Portal's Death (and Rebirth)"

"The Great Portal Divide: How a Rift in the Portal Market Will Impact Your Web Strategy"

"The Ethos of Vendor User Experience Platforms"

"Portals for Mortals: Eight Keys to People-Centric Portal Strategies"

"Build an Enduring Portal Strategy for a Wave of Change on the Web"

"The Emerging User Experience Platform"

### Evaluation Criteria Definitions

#### Ability to Execute

**Product/Service:** Core goods and services offered by the vendor that compete in/serve 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 (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 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 and Track 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 and understand buyers' wants and needs, and can shape or enhance those with their added vision.

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

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

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

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

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

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

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

### More on This Topic

This is part of an in-depth collection of research. See the collection:

- Research Roundup for Web Computing, 2012

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