

Magic Quadrant for Web Content Management

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VIEW SUMMARY

Web content management remains a vibrant and growing market, fueled by the aspirations of digital strategists on the demand side and continuous innovation on the supply side. IT application leaders, marketers, digital experience specialists and merchandizers all now view WCM as mission-critical.

Market Definition/Description

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

- Content creation functions such as templating, workflow and change management
- WCM repositories that organize and provide metadata about the 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, marketing resource management, digital asset management (DAM) and Web analytics
- Real-time adaptation to visitor interaction
- Good integration with delivery tiers, such as e-commerce, social media and portal software

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ACRONYM KEY AND GLOSSARY TERMS

| | |
|-------------|---|
| DAM | digital asset management |
| LAMP | originally "Linux-Apache-MySQL-PHP," now generic software stack model |
| OSS | open-source software |
| WCM | Web content management |

EVIDENCE

The analysis in this document is based on information from a number of sources, including:

- Extensive data on functional capabilities, customer-base demographics, financial status, pricing and other quantitative attributes gained via an RFI process that engaged vendors in this market.
- Interactive briefings in which vendors provided Gartner with updates on their strategy, market positioning, recent key developments and product roadmaps.
- A Web-based survey of reference customers provided by each vendor. This captured data on usage patterns, levels of satisfaction with major product functionality categories, various non-technology-related vendor attributes (such as pricing, product support and overall service delivery), and more. In total, 385 organizations across all major regions provided input on their

Figure 1. Magic Quadrant for Web Content Management



Vendor Strengths and Cautions

Acquia
Strengths

- experiences with vendors and their tools.
- Feedback about tools and vendors captured during conversations with users of Gartner's client inquiry service.
- Market share and revenue growth estimates developed by Gartner's technology and service provider (T&SP) research unit.

NOTE 1
DIGITAL WORKPLACE STRATEGY

The digital workplace is a business strategy for promoting employee effectiveness and engagement through a more consumer-like computing environment.

EVALUATION CRITERIA DEFINITIONS

- Ability to Execute**
Product/Service: Core goods and services offered by the vendor for the defined market. This includes current product/service capabilities, quality, feature sets, skills and so on, whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.
- Overall Viability:** Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood that the individual business unit will continue investing in the product, will continue offering the product and will advance the state of the art within the organization's portfolio of products.
- Sales Execution/Pricing:** The vendor's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support, and the overall effectiveness of the sales channel.
- Market Responsiveness/Record:** Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the vendor's history of responsiveness.

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

- The popularity of the Drupal open-source platform is an extremely positive feature for Acquia, with its installed base dwarfing that of any of the commercial vendors. Customers seeking enterprise-level support and cloud services for Drupal usually consider Acquia.
- Acquia represents one of the fastest-growing options for WCM among large enterprises, with an expanding global presence.
- Customers report relatively easy upgrades from Acquia, compared with offerings from other vendors.

Cautions

- Acquia is more expensive than some companies believe when they initially seek open-source options, but customers still view Acquia's total cost of ownership favorably.
- Acquia's Drupal may be too complex for organizations needing relatively simple WCM capability. Its complexity, when compared with alternative options, may make it unsuitable for some midmarket organizations.
- The pending release of Drupal version 8 creates some uncertainty for decision makers who wish to base their digital strategies on the latest platform. At the time of publishing, Drupal 8 was in beta testing and supported on the Acquia platform.

Adobe

Strengths

- Adobe Experience Manager has one of the richest sets of WCM capabilities in the market. Decision makers rate its internal user experience very highly.
- Adobe's overall product direction reflects a deep understanding of all the important trends of WCM. It also reflects a similar level of understanding of important adjacent markets, such as DAM, digital commerce and multichannel campaign management.
- Adobe is one of the few vendors that appears regularly in the selection processes that Gartner clients share with us. This suggests that Adobe's marketing and sales execution align very well with enterprise needs.

Cautions

- Adobe's WCM offering is one of the more expensive in the market, sometimes being twice the price of its nearest competitor. Some respondents to the WCM Magic Quadrant reference survey in April 2015 cited price as one of the reasons for excluding Adobe from further consideration.
- Feedback from the market suggests there is still a major gap between the possibilities presented during the sales cycle and the implementation effort needed to turn those possibilities into reality. Gartner has heard of a few organizations using other WCM products in addition to Adobe, because of implementation costs being higher than expected with Adobe.
- Adobe has yet to establish a strong appeal in the very important midmarket segment, although it did launch a cloud-based midmarket offering in early 2015. Unlike other vendors, it does not enable smaller organizations to start small and scale at their own pace, or offer accelerators that help reduce the intensity of the initial effort.

combination of publicity, promotional initiatives, thought leadership, word of mouth and sales activities.

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

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

Completeness of Vision

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

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

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

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

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

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

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

Geographic Strategy: The vendor's strategy to direct

Automattic

Strengths

- The popularity of WordPress on the Web, brand recognition and familiarity through consumerization have put Automattic on an increasing number of customer selection lists.
- Automattic's pricing is attractive and scalable. This appeals to midmarket and larger enterprises that wish to start small and grow their solution and corresponding investment incrementally.
- Automattic's core platform is simple and can be extended with a large range of themes, plug-ins and APIs. Third-party integration is well-documented and widely used. For example, there are APIs, feeds and "official" plug-ins for popular integrations (such as Facebook, Twitter and Brightcove).

Cautions

- Automattic's customers can find it difficult to manage the different themes, plug-ins and provided connectors, many of which come from third parties. Although help is available — for example, through client dashboards, documentation and the WordPress community — the need for more prescriptive guidance remains high.
- Automattic's interface is not as rich as those of some of its competitors. Although Automattic highlights its simplicity, decision makers often place more importance on the number of advanced capabilities that are readily accessible by non-IT professionals than on ease of use.
- Automattic's advanced personalization/context-awareness capabilities require more extensive customization than many of the vendor offerings discussed in this Magic Quadrant. These capabilities also require multiple third-party plug-ins.

CoreMedia

Strengths

- CoreMedia 8 is a well-designed, easy-to-use offering that appeals to both IT and business users. The offering — combined with CoreMedia Adaptive Personalization and CoreMedia LiveContext for delivering contextualized e-commerce experiences — constitutes a comprehensive, high-quality set of capabilities that appeal to organizations in many sectors.
- CoreMedia provides accelerators that help shorten time to solution and significantly reduce implementation efforts. This and CoreMedia's simple and scalable pricing model appeal to decision makers in the midmarket and in larger enterprises.
- CoreMedia has a clear marketing message about supporting digital strategies, and strong references to back up its claims. Users can combine their offering with products from e-commerce vendors for cross-channel continuity of the digital experience.

Cautions

- CoreMedia's story for its cloud capabilities is less powerful and comprehensive than those of some of its competitors. As the importance of — and urgency for — platform-as-a-service and SaaS WCM capabilities increases, decision makers may find that CoreMedia's offering does not fully meet their solution requirements.

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.

- CoreMedia's North American partner ecosystem needs more development, both for solution development and as part of the vendor's go-to-market strategy. In the meantime, decision makers considering CoreMedia should assess the available expertise to help with their digital strategies.
- CoreMedia lacks the marketing might, and therefore the effectiveness, of some of its competitors. This often results in Gartner clients excluding CoreMedia from their shortlists, hindering its ability to grow at the rate required to remain competitive in the WCM market.

CrownPeak

Strengths

- CrownPeak is an experienced SaaS provider of WCM products, an area experiencing growing demand. It has grown strongly in the past few years, gaining new customers and expanding within its installed base.
- CrownPeak's service architecture is fully multitenant, which brings scalable, flexible, pay-as-you-go and continuous innovation qualities. It provides excellent ongoing follow-up with customers to obtain their input into its roadmap and development on, for example, out-of-the-box connectors to third parties.
- CrownPeak's "zero implementation" message and associated features appeal to enterprises challenged with global site management, and to the midmarket — a rapidly growing segment of the WCM market.

Cautions

- CrownPeak's marketing effectiveness has lagged behind its vision; its market visibility is relatively low.
- CrownPeak emphasizes scenarios that are generally mainstream and undifferentiated. It has yet to embrace leading-edge ideas strongly in its overall messaging.
- CrownPeak does not provide such a comprehensive set of capabilities as some of the other vendors featured in this research. It may not always be able to keep pace with prospective customers' solution roadmaps.

EPiServer

Strengths

- Customers regard EPiServer highly as a product designed for the future of WCM in the age of digital business. Its granular "atomized" content and high interoperability make it suitable for context-aware computing and multichannel digital experiences.
- EPiServer's merger with Ektron in January 2015 has given EPiServer new investment, fresh direction and a greater global presence.
- EPiServer Digital Experience Cloud makes clever use of the cloud's scalable and flexible qualities. It strengthens EPiServer's appeal to the midmarket — from where the next wave of major WCM growth is likely to come — while also establishing itself as an enterprise-class vendor for larger organizations seeking the advantages of a cloud solution.

Cautions

- Some existing customers, especially on the Ektron side of the merger, have reported lapses in product updates and customer service that have made them consider moving to another vendor. EPiServer may struggle to convince such Ektron users to migrate to the converged platform, although the availability of new cloud deployment options may mitigate this.
- Some enterprise customers have reported an increase in pricing. Although Digital Experience Cloud offers attractive entry-level pricing for small and midmarket groups and organizations, some decision makers have removed EPiServer from their shortlists because its newly introduced cloud pricing appeared higher than that of some of its competitors.
- EPiServer, which is .NET-based and offers support for Microsoft Azure, SharePoint and Dynamics, has not taken advantage of its relationship with Microsoft to the same degree as some of its key competitors.

e-Spirit

Strengths

- During the past few years, e-Spirit has built a steady reputation with its FirstSpirit WCM offering, which is highly interoperable with key adjacent technologies — such as portals and e-commerce technologies. It has forged excellent partnerships with larger technology providers, with a view to embedding FirstSpirit in a larger solution landscape.
- This vendor has a good reputation with customers for short implementation times, even in situations calling for interoperability with complex systems.
- FirstSpirit provides a broad set of high-quality capabilities that are easy to use for both casual and power users.

Cautions

- This vendor's implementation partner ecosystem is still much smaller than those of some of its competitors. This means e-Spirit has a lower sales penetration than some other vendors, particularly in North America, which raises some concerns for decision makers about locally available, domain-specific support.
- FirstSpirit may not be sufficient to help organizations requiring more leading-edge capabilities. In such cases, e-Spirit may need to carry out additional development, but Gartner clients often opt for vendors with richer capabilities built into their products.
- As yet, e-Spirit has not responded as fully as some of its competitors to the rising demand for cloud-based solutions for WCM. FirstSpirit's managed hosting offerings do not match the full, multitenant SaaS and platform-as-a-service offerings provided by some other WCM vendors.

eZ Systems

Strengths

- The combination that eZ Systems offers — of open-source software (OSS) and vendor backing — is a model that continues to gain in popularity, both at the enterprise and midmarket level.
- The vendor's highly scalable, subscription-based pricing model appeals to organizations that want to

approach their digital strategy at a modest pace. It enables eZ Systems' customers to grow their solution and investment gradually.

- The Linux-Apache-MySQL-PHP (LAMP) stack with Symfony is a combination that is increasing in popularity and gaining momentum as a viable contender in multiple sectors. This provides eZ Systems with the opportunity to extend its installed base beyond its more traditional content-centric contexts, such as publishing and media.

Cautions

- Most of the installed base of eZ Publish Platform is still in Europe. It has made only very minor gains in the larger U.S. market and the emerging Asia/Pacific market.
- Gartner has seen strong improvements in the progress and direction of competing enterprise-focused vendors that also exploit LAMP OSS communities that have not been echoed in the community surrounding eZ Publish. This presents a risk for decision makers concerned about the future direction and roadmap of the differentiated components of the eZ Systems platform.
- Gartner clients rarely include eZ Systems in their selection processes, even where its platform would be a good fit. Although eZ Systems has already begun to invest more heavily in its marketing strategy and execution, and has achieved some promising early results, its overall marketing effectiveness continues to lag behind that of some of the other vendors featured in this Magic Quadrant.

GX Software

Strengths

- GX Software has improved the user interface of XperienCentral to a level where it appeals to both IT and business users. This is important, because departments specializing in marketing and customer experience now have a greater say in selection processes.
- The close interoperability between GX Software's XperienCentral and BlueConic for engagement analytics provides enterprises and midmarket organizations with a compelling opportunity to drive their digital strategy at a fast pace. It also enables them to avoid the higher investment required of some market alternatives.
- GX Software has a good set of capabilities to support complex interactions and transactions. It is therefore a good option for organizations with, for example, subscription-based models that need to be more interactive with customers on an ongoing basis.

Cautions

- GX Software's presence in North America is very small, whereas its direct competitors have steadily increased their presence in the region during recent years. This limited presence will hinder its growth and also make it less able to respond to the requirements of more leading-edge solutions, environments and use cases.
- The partner ecosystem surrounding GX Software is growing at a far slower rate than those of its main competitors in this Magic Quadrant. This is likely to prevent GX Software's inclusion in many digital strategies as selection becomes increasingly influenced by such partners.
- GX Software's range of capabilities is modest compared with those of its main competitors,

particularly with respect to more advanced functionality and agility provided to business users.

Hippo

Strengths

- The combination of enterprise-level capabilities on top of the standards-based, well-designed Java Content Repository (Apache Jackrabbit) provides a solid and attractive basis for Hippo's offering.
- Hippo's OSS delivery model is very attractive to those unable to pay the higher prices of other Java offerings that are closed source.
- In 2Q15, Hippo entered a partnership with EMC that could open up fresh opportunities and raise Hippo's profile. It could also make U.S. decision makers more confident about including Hippo on their longlists and shortlists.

Cautions

- Hippo's presence in North America is still modest compared with that of other European vendors.
- Hippo has been unable to use its OSS context to gain as much visibility and as extensive a partner ecosystem as other OSS communities with which it competes. Decision makers may decide that Hippo cannot continue to develop at the rate required for the solution at hand.
- Hippo's vision and messaging was once leading-edge, but has since become more mainstream. Its customer deployment examples are less innovative than those provided by some of its competitors.

HP

Strengths

- HP's launch of the HP Enterprise brand in April 2015 has been accompanied by a greater focus on broader solution capabilities directly relevant to WCM and related solutions. The associated management changes to reinforce the strategy have already taken place.
- HP exploits good synergies with other components that organizations are now coupling more frequently with WCM. These include customer communications management, DAM, data management platforms and big data analytics.
- HP has a strong reputation as a global entity accompanied by a high level of customer loyalty. This is likely to support a steady stream of interest in its WCM capabilities, providing it with a cross-selling opportunity as enterprises develop and execute on their digital strategy.

Cautions

- Customers often regard TeamSite's user interface and the richness of its features unfavorably compared with those of some competitors. Version 8 is designed to improve the experience for line-of-business users, but it remains to be seen whether the expected improvements will be enough to close the gap.
- HP's marketing and sales effectiveness is not strong enough beyond its own installed base. Gartner rarely sees HP in longlists where it would be a good fit technologically, and it trails behind other Leaders in terms of new customers.

- Although HP has a strong and accurate vision with regard to the WCM market, it could have difficulty executing on it unless it regains its reputation for leading-edge innovation with regard to its core WCM capabilities. This could be a concern for decision makers engaging in more leading-edge digital strategies.

IBM

Strengths

- IBM Digital Experience on Cloud shows great promise, reflecting IBM's understanding of the cloud's potential beyond the deployment model. It brings agility and innovative features while reducing the typical back-end complexity.
- IBM is one of only a few companies that comes close to being a "one-stop shop" for WCM and digital experience. Organizations that prefer to deal with one vendor (in this expansive market filled with options) often benefit from IBM.
- IBM has made significant improvements to its user interface. These changes cover content authoring, page creation and audience targeting.

Cautions

- Despite progress with Digital Experience on Cloud, customers considering IBM still often discount it because they perceive relatively high complexity and related cost.
- IBM Web Content Manager has a nearly exclusive appeal for fully devoted "IBM shops." Decision makers deciding against IBM in competitive situations cite usability and capability shortcomings relative to other WCM leaders.
- Although IBM has shifted its positioning to appeal more to marketing and business leaders, its messaging still resonates most strongly with the technology audience.

Microsoft

Strengths

- Microsoft's greatest strength is its firm position as a central vendor in the collaboration and digital workplace strategy (see Note 1) of most enterprises.
- Microsoft has a solid vision for WCM in the intranet context, geared toward "ready to go" experiences. It complements these with simple content-authoring capabilities for business people who want to build and maintain departmental or group Web pages and sites.
- Microsoft is using search more prominently to drive content strategy. This could provide dynamic and personalized Web experiences without the need to build personalization and targeting rules manually.

Cautions

- Any dedicated, focused WCM effort is disappearing as Microsoft pushes customers toward the cloud and Office 365. WCM's greatest urgency and innovation lies in external, customer-facing scenarios, but Microsoft is focusing almost exclusively on business-to-employee scenarios.

- Customers wanting to use Microsoft for differentiated customer-facing Web and digital initiatives face the prospect of heavy customization. This has consistently been troublesome when working with SharePoint and will be more so in a cloud-based system.
- Feedback from the market suggests usability issues with SharePoint at a time when business is seeking an ever higher level of agility from WCM products. Other vendors in this Magic Quadrant provide far greater agility to marketers than Microsoft provides with SharePoint.

OpenText

Strengths

- OpenText has improved its overall messaging about WCM and its role as part of an overall strategy to enrich customer experiences. It has an appealing vision for combining e-commerce and content scenarios, supporting either a product-centric or content-centric approach.
- OpenText's acquisition of Actuate in January 2015 will allow it to embed meaningful and differentiating analytics and optimization capabilities into its Web Experience Management offering.
- Customers regard OpenText highly for its versatility in managing various content types, including text and rich media. They also value its versatile handling of applications and business processes, including marketing and customer service.

Cautions

- OpenText is building momentum and relevance to broader solutions that address customer experience. However, its mind share and market share are lower than we would expect for a large vendor with a primary focus on content management.
- OpenText's sales messaging promotes a strong relationship between WCM and its various enterprise content management and enterprise information management offerings. Often, however, customers and prospective customers have the impression that OpenText is focusing its R&D efforts on integration with other OpenText products rather than improving interoperability with third-party offerings.
- Decision makers in contact with Gartner rank OpenText as below average for ease of installation. Some customers say that presumed "out of the box" features often require customization.

Oracle

Strengths

- Oracle combines Oracle WebCenter Sites with an abundance of capabilities in a broader suite of products, such as Oracle Commerce and the Oracle Marketing Cloud. More advanced digital strategies and contextualized experiences require many components of this suite.
- Oracle has complemented its WCM offering by pursuing a sound acquisition strategy during the past few years, such as its 2014 acquisition of BlueKai. It has included BlueKai in the Oracle Marketing Cloud so that marketers can increase the effectiveness of their digital efforts by incorporating more insights from big data.
- Oracle has a very well-developed partner ecosystem in a market where orchestration of multiple components has already become a critical success factor.

Cautions

- Oracle's suite approach can be overwhelming in terms of cost and complexity, especially when components are based on different acquisitions and some of the components required to create the experience have integrations still under development.
- Gartner clients rarely consider Oracle unless they are already an Oracle customer. Decision makers eliminating Oracle from shortlists often cite complexity and poor usability as the primary causes — compared with other vendor offerings discussed in this report.
- The development rate of new features for Oracle WebCenter Sites is modest when Oracle's size and prowess is considered. In addition, given Oracle's focus on the superset of capabilities required to support broader digital strategies, decision makers should ensure the WCM-related capabilities are sufficient to meet ongoing solution requirements.

Progress

Strengths

- Progress has a reputation for ease of development and short time to value. It offers a strong WCM foundation along with a vibrant ecosystem of .NET-related tools, enabling orchestration with additional technologies for more advanced digital experiences.
- The acquisition of Telerik in December 2014 could improve the ability of Progress to innovate, extend its global reach, increase its viability and enhance its credibility in the WCM market.
- Progress's Sitefinity demonstrates strength in multichannel, multicountry, multibrand, "semicentralized" organizations. Sitefinity supports: mobility, easy provisioning, staging and launching of brand-specific sites; granularity of workflows for sites; and the content provider, language, and global and local taxonomies required to strike the right balance of central control with distributed autonomy.

Cautions

- Although digital marketing has sparked most of the innovation in, and appeal of, the WCM market in recent years, Progress has historically been devoted to "empowering developers," rather than marketers. Decision makers should seek WCM-related roadmap information articulating the connections between development and marketing to ensure alignment with their business initiatives.
- The Sitefinity brand has demonstrated limited WCM market presence in the U.S.
- Progress has not yet been able to take full advantage of its .NET basis together with Microsoft's revised direction and associated reduced emphasis on customer-facing WCM. This means it has not become a "go to" WCM vendor to the same extent as some of its competitors for customers that have standardized on SharePoint.

SDL

Strengths

- SDL's BluePrinting capability and architecture allows it to readily accommodate a mobile,

multichannel, multidevice and multilanguage Web presence. A relatively granular architecture equips the platform for the contextualization that the next stage of digital business will require.

- SDL's cloud solution and flexible pricing enables organizations to start small and scale at their own pace.
- SDL has been making it easier to create and manage sites and customer journeys. It has made progress in achieving a balance between ease of use and sophistication, which is hard to accomplish in the WCM market.

Cautions

- Although Gartner has seen some improvements in SDL's partnership strategy, it has not done as well as some of the other WCM leaders in this report at forming consistent, long-term alliances to extend its brand and ensure customer success.
- Since 2013, SDL's marketing has not been sufficiently effective and it has lost significant customer mind share and market momentum. Although it is beginning to show signs of recovery, and is appearing on customer selection lists again, the positive effects of its recent reorganization and investments in marketing are still a work in progress.
- Gartner continues to see need for improvement of SDL's sales effectiveness. In many cases, Gartner interacts with enterprises that include SDL on longlists but not on shortlists.

Sitecore

Strengths

- Sitecore benefits immensely from its ongoing and successful partnership with Microsoft, and was Microsoft's Alliance ISV Partner of the Year for 2013 and 2014. Most Gartner clients that need .NET technology include Sitecore in their shortlists.
- The range of capabilities in version 8 of the newly positioned Sitecore Experience Platform is among the best in the market. Sitecore has incorporated into the product some highly valuable features, such as engagement analytics, a/b testing (or split testing) and data management platform capability.
- Sitecore has increased its installed base in all regions that drive the WCM market. This means customers often select it for more leading-edge and market-defining solution contexts.

Cautions

- Sitecore's strategy of increasing prices in recent years has raised concerns with some decision makers about the required total investment. Gartner has received reports that suggest multiple increases in 2014 alone.
- Sitecore has been slow to exploit the opportunity for cloud capability. Its cloud offering is still minimal compared with that of some of its competitors.
- Some market reports suggest a negative change in how Sitecore deals with prospective business contacts and existing clients and partners, resulting in communication difficulties and a compromised customer experience during selection cycles. Gartner attributes this to "growing pains" and believes it will be temporary, but decision makers interacting with Sitecore should obtain

a higher standard of consistency and engagement.

Squiz

Strengths

- Squiz has done very well to combine an offering that includes LAMP-based OSS with vendor backing and a highly flexible set of cloud capabilities. In doing so, it has exploited the rising importance and popularity of each of these areas.
- Squiz has significantly increased its appeal to marketers, offering a broad range of capabilities that non-IT professionals can use easily. It has also improved its interoperability with adjacent technologies, such as CRM and marketing automation, together with the associated messaging about these capabilities.
- Squiz complements the WCM capabilities of Matrix with an admirable breadth of capabilities — given its size in relation to some of its competitors. These capabilities include connectors for Google Analytics, together with search and a content delivery network for global deployments.

Cautions

- Squiz still has only a small presence in North America, where investment in the WCM market is highest and solution contexts are more leading-edge. This will impede its growth and market share in this region and limit its ability to showcase successful involvement with such innovative scenarios.
- Market feedback suggests Squiz is experiencing increased and effective competition, even in its "home ground" of Australia, resulting in some losses where Squiz would otherwise have been the preferred contender.
- Squiz's high-level marketing message does not fit consistently with prospective customers' prioritized needs. For this reason, prospects often exclude Squiz from longlists, even where it would be a good fit.

Vendors Added and Dropped

We review and adjust our inclusion criteria for Magic Quadrants and MarketScopes as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant or MarketScope may change over time. A vendor's appearance in a Magic Quadrant or MarketScope one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. It may be a reflection of a change in the market and, therefore, changed evaluation criteria, or of a change of focus by that vendor.

Added

- Progress (because of its acquisition of Telerik)
- Hippo (because it now meets all the inclusion criteria)

Dropped

- Telerik (because Progress acquired it)

Inclusion and Exclusion Criteria

We used these inclusion criteria:

- **Total WCM software revenue.** The total WCM software revenue for 2014 must exceed \$15 million.

Total WCM software revenue *includes* the revenue generated by sales of WCM software and software maintenance and support services. Total WCM software revenue includes:

- License revenue. Revenue from licenses that give the right to use the software based on contract type (perpetual or term license)
- Cloud revenue. Revenue from cloud services, including:
 - Business process as a service
 - Infrastructure as a service
 - Back-end as a service
 - SaaS
- Subscription revenue (excluding cloud revenue). Annual fees for licensed, on-premises software, as well as license revenue for single-tenant managed services (such as hosting)
- Technical support and maintenance revenue. Contract fees for support services (excluding training), new versions, updates and upgrades

Total WCM software revenue *excludes* revenue from professional services and the sale of products manufactured by other vendors. It also excludes revenue arising from customer requests for software changes, even if such changes are subsequently incorporated into the core WCM offering. However, it includes increases in software license charges as a result of such changes.

- Geographic presence. The vendor must have been in business for more than five years, with a multigeographic presence for at least a year and a strategy that supports further geographic expansion. It must actively market its WCM offering in at least two of the following regions:
 - North America
 - Europe, the Middle East and Africa
 - Asia/Pacific
- **Vertical and horizontal capabilities.** The vendor must actively market its products in more than two major vertical markets, and in more than one horizontal application category (such as e-commerce and customer self-service).
- **Ecosystem activity and market interest.** We measure this by assessing:
 - The market, including community forums, books, seminars and client, partner and channel activity (IT services firms, system integrators, distributors, Web interactive agencies and advisory firms).
 - The level of interest Gartner end-user clients have shown in the vendor, based on the number of inquiries to analysts via the Gartner call center or during one-on-ones at Gartner conferences.

- **References.** The vendor must have WCM software commercially available and active customers that use the product in production scenarios. Some of these customers should be of enterprise scale, with more than 50 contributing authors and an average monthly number of page views comfortably exceeding 500,000, though deployments supporting even larger numbers of users are preferable.

The vendors must offer at least the following functions:

- WCM as a stand-alone product or suite of products
- A content repository with basic library services, such as check-in/check-out and versioning
- Authentication of users (authors, editors and reviewers) and assignment of permissions
- Content authoring, through browser-based templates or via conversion from a word-processing application
- Workflow sufficient for content review and approval
- Conversion to HTML or XML and support of templates for Web rendering
- Support for Web Content Accessibility Guidelines (WCAG)
- Managed delivery of content to Web servers or site management systems
- Capabilities for multisite and multilanguage management
- Web analytics and reporting capabilities
- "What you see is what you get" design capabilities with the ability to modify and customize look, feel and behavior independent of content
- Support for multiple roles (including developer, administrator, editor, marketer and author) in a distributed contribution environment
- Support for content aggregation and syndication (via APIs, REST interfaces, RSS or similar)
- Ability to manage rich media in the context of Web efforts
- Ability to support interaction with target audiences using various devices (such as tablets, smartphones and smart TV) over multiple channels (such as Facebook, Twitter and LinkedIn)

Evaluation Criteria

Ability to Execute

Ability to Execute measures how well a vendor sells and supports its WCM products and services globally. We used the following criteria to assess Ability to Execute:

- **Product/service** evaluates product functions in areas such as:
 - Multisite and multilanguage management
 - Web analytics and reporting
 - Design
 - Content modeling

- Metadata management
- **Overall viability** includes an assessment of the vendor's financial health and overall success, together with the likelihood that it will continue to invest in the product.
- **Sales execution/pricing** evaluates the vendor's success in the WCM market, including:
 - WCM revenue and the installed base
 - Pricing
 - Presales support
 - Effectiveness of the sales channel
 - Level of interest from Gartner clients
- **Market responsiveness and track record** evaluates how well the WCM offering matches buyers' requirements at acquisition. We assess the vendor's track record in delivering new functions when the market needs them. We also consider how the vendor differentiates its offerings from those of its major competitors.
- **Marketing execution** evaluates the clarity, quality, creativity and efficacy of the vendor's efforts to market its WCM offerings. We examine aspects such as thought leadership, word of mouth and sales activities.
- **Customer experience** evaluates functions or services within production environments, including:
 - Ease of deployment
 - Operation
 - Administration
 - Stability
 - Scalability
 - Vendor support

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

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

Table 1. Ability to Execute Evaluation Criteria

| Evaluation Criteria | Weighting |
|-------------------------|-----------|
| Product or Service | High |
| Overall Viability | Medium |
| Sales Execution/Pricing | High |

| | |
|------------------------------|--------|
| Market Responsiveness/Record | Medium |
| Marketing Execution | Medium |
| Customer Experience | High |
| Operations | Medium |

Source: Gartner (July 2015)

Completeness of Vision

Completeness of Vision focuses on the vendor's potential and points to its future chances of success. A vendor can succeed financially in the short term, but won't become a Leader without vision and a strategic plan. A vendor with average vision will anticipate and respond to changes by noticing market trends and exploiting technology. A vendor with superior vision anticipates, directs and initiates market trends — particularly when it integrates its vision into a range of areas — and capitalizes on product and service development. We used the following criteria to assess Completeness of Vision:

- **Market understanding** evaluates the vendor's ability to understand buyers' needs and translate those needs into vertical and horizontal WCM products and services. Vendors that show the highest degree of vision listen to buyers, understand their wants and needs, and can shape or enhance those wants and needs. WCM vendors that show the highest degree of market understanding adapt to customer requirements in areas such as SaaS, dynamic contextualized delivery and ease of use for nontechnical staff.
- **Marketing strategy** evaluates the extent to which the vendor articulates a differentiated message and communicates it consistently. We look for consistent communication throughout the organization and through its website, advertising, customer programs and positioning statements, as well as statements of direction and product roadmaps.
- **Sales strategy** evaluates the vendor's use of direct and indirect sales, marketing, service and communications to extend the scope and depth of its market reach.
- **Offering (product) strategy** evaluates the vendor's approach to product development and delivery, and how it emphasizes functions and features as they map to requirements for WCM. We also evaluate the vendor's development plans for the next 12 to 18 months.
- **Business model** evaluates the soundness and logic of the vendor's underlying business proposition. It also assesses whether the vendor offers synergies with other ECM components, such as DAM, records management and document management.
- **Vertical/industry strategy** evaluates how the WCM vendor uses its direct resources, skills and offerings to meet the specific needs of individual market segments, such as the media industry.
- **Innovation** evaluates the vendor's development and delivery of differentiated WCM technology that addresses critical customer requirements. We evaluate product capabilities and customers' use of them in areas such as:
 - Templating
 - Workflow and change management
 - WCM repositories

- Library services

We also look at other product-specific capabilities that customers need and deploy.

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

Table 2. Completeness of Vision Evaluation Criteria

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

Source: Gartner (July 2015)

Quadrant Descriptions

Leaders

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

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

Challengers

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

Visionaries

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

Niche Players

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

Context

Study this Magic Quadrant to understand the WCM market and how Gartner assesses the main vendors and their packaged products. Use it to help evaluate vendors based on a customized set of objective criteria. Don't simply select vendors from the Leaders' quadrant. Consider how our evaluations match with your particular needs. A Challenger, Niche Player or Visionary could be the best fit for your organization.

Market Overview

The WCM market continues to benefit from factors such as:

- Highly mature technology
- The ease with which non-IT professionals can access and use the technology
- The highly ambitious goals of line-of-business users' digital strategies

These factors have fueled annual growth of more than 11%, and in 2014 the market achieved total software revenue of \$1.4 billion. However, these figures tell only a small part of the success story of developments in this area.

Interest is growing in WCM across a broad spectrum of contexts. On the more traditional side of the spectrum, organizations still view WCM mainly as a way to deal with the growing volume of Web content. They are beginning to view the associated repositories and content models as a necessary piece of the overall information architecture puzzle. Although other facets of the same architecture remain elusive and expensive, WCM is the "low-hanging fruit" that enables organizations to greatly improve the content

landscape for a relatively low investment. Gartner often sees organizations following this approach, replacing homegrown systems with more mature alternatives. We have seen growing interest in cloud-based offerings in all regions in addition to traditional on-premises deployments.

However, it is the other side of the spectrum that grabs the biggest headlines. A rapidly growing number of enterprises and midmarket organizations are raising their expectations of the digital channel. They are seeking to connect successfully with target audiences and engage these audiences with highly contextualized, cross-channel experiences. Multiple areas of focus are now converging around WCM, allowing organizations to achieve their ambitions for customer satisfaction, marketing, CRM and digital commerce by including WCM in the mix.

In relative terms, this trend has only just begun and Gartner expects that the popularity of WCM will continue.

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