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Magic Quadrant for Web Content Management

Published: 28 September 2016 **ID:** G00290730

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Summary

Digitalization brings both new opportunities and confusion to even the most carefully planned selection processes for WCM. CIOs and IT leaders aiming to boost the effectiveness of their digital business strategy should use this document to help them select the most appropriate vendor and solution.

Market Definition/Description

This document was revised on 13 October 2016. The document you are viewing is the corrected version. For more information, see the Corrections

(http://www.gartner.com/technology/about/policies/current_corrections.jsp) page on gartner.com.

Gartner defines web content management (WCM) as the process of controlling content for consumption over digital channels through the use of specific management tools based on a core repository.

These tools may be procured as commercial products or as open-source 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 sales force automation, customer self-service, marketing resource management, digital asset management (DAM) and web analytics

- Support for personalization/real-time adaptation to visitor interaction

- Good integration with delivery tiers, such as digital commerce, social media and portal software

Magic Quadrant

Figure 1. Magic Quadrant for Web Content Management



Source: Gartner (September 2016)

Vendor Strengths and Cautions

Acquia

STRENGTHS

Version 8.x of Acquia's Drupal offering, released in November 2015, prepares Acquia and its customers for the next phase of the digital experience. This version brings many improvements, including architectural refinements that help ensure content control, granularity, and reuse across digital channels and means of interaction.

Acquia has been effective at cultivating and capitalizing on the popularity of Drupal and its community, while ensuring its resilience for use in enterprise-class use cases. Acquia has given leadership, focus and direction to the Drupal community, thereby enabling an unprecedentedly rapid and responsive pace of development.

The Acquia Cloud Site Factory offering is a foundational element for an increasing number of web and digital experiences for leading-edge brands. Acquia has grown rapidly in the consumer packaged goods and retail sectors, adding to its well-established base in the media and entertainment and government sectors.

CAUTIONS

Despite Acquia's worthy efforts to smooth the transition, the move to Drupal 8.x will likely entail a significant migration effort for existing customers, as it is a major new release.

Acquia's Cloud Site Factory offering may prove a complex choice for organizations with simpler web publishing use cases.

Customer feedback received by Gartner suggests some confusion with regard to Acquia's pricing. Gartner sees many examples of suggested pricing that varies from region to region and that does not reflect the levels of granularity and growth required by prospective customers.

Adobe

STRENGTHS

Adobe Experience Manager is cutting-edge technology. Adobe should therefore be considered by any organization whose digital aspirations are high and whose required pace of progress is ambitiously fast.

Adobe Experience Manager is deeply integrated with Adobe Creative Cloud and Adobe Marketing Cloud – offerings that are already well-known to many decision makers in the WCM market.

Adobe has proven to be a strong and consistent Leader in this market, particularly in terms of its business strategy and capabilities. Many vendors regard Adobe as "the one to beat."

CAUTIONS

Adobe's strategy of pricing its software relatively highly may make it difficult for some organizations to achieve a worthwhile return on the required investment in a reasonable time. In addition, although Adobe has introduced a pricing structure more suitable for the midmarket, other vendors offer more cost-effective options, in some cases for comparable capabilities.

Decision makers involved in selection processes should ensure they understand which components used in Adobe's demonstrations are (1) available "out of the box" and (2) part of its core WCM offering. Feedback received by Gartner suggests that Adobe does not always make this clear, which leads to confusion, followed by surprise with regard to the products found to be required to deliver the capabilities demonstrated.

Gartner has received feedback from some organizations indicating that they have invested in Adobe's WCM software but failed to realize the advertised benefits of the high-end features, due to associated customization complexities. Although this is not necessarily (or solely) Adobe's fault, IT leaders should be realistic about their company's ability to use Adobe's features and seek appropriate Adobe training.

Automattic

STRENGTHS

Gartner has seen a marked increase in interest in Automattic's WordPress.com VIP offering in 2015 and the first half of 2016, and its resulting inclusion on many shortlists. All indications suggest that this trend will continue.

Automattic's WordPress.com VIP is well-regarded for its flexibility, loyal web design community and large ecosystem.

Automattic's WordPress.com VIP offers many capabilities designed for ease of use by business users. This means that such users have a greater degree of agility, without having to interact with technical staff.

CAUTIONS

Gartner rarely sees WordPress.com VIP shortlisted by large organizations, although the trend is slowly improving. Decision makers should insist on demonstrations and on access to customer references that clearly show the appropriateness of Automattic's current capabilities.

Automattic has a relatively tactical vision and tends to appeal more to technical audiences. Its messaging does not reflect as deep an understanding of enterprise or industry-specific goals as other vendors more established in the enterprise software market.

Automattic's sales and marketing efforts are significantly less strategic than those of other vendors in this market. This sometimes confuses buying organizations about the appropriateness of Automattic's offering for their digital strategy.

CoreMedia

STRENGTHS

CoreMedia's digital experience platform, which includes CoreMedia 8 and CoreMedia LiveContext, offers a strong set of high-quality, user-friendly capabilities with an excellent delivery tier. In addition, its pricing is highly attractive, compared to that of its direct competitors.

CoreMedia emphasizes cross-channel continuity and has excellent references for related solutions.

CoreMedia has impressive partnerships – for example, with IBM – and excellent interoperability for advanced digital commerce scenarios.

CAUTIONS

CoreMedia's marketing efforts have not given it the same level of visibility as its direct competitors in the WCM market. Gartner often sees CoreMedia omitted from selection processes where its offering would have been a good fit.

CoreMedia's offering is sometimes overlooked as it can appear to fall between two stools – on one side, higher-end alternatives with enormous ecosystems and, on the other, lower-end, open-source alternatives that focus on the needs of developers.

CoreMedia needs to increase the size of its sales organization and seize channel opportunities more effectively. The success of its competitors poses great challenges, particularly in North America where the highest proportion of investment is made in this market.

Crownpeak

STRENGTHS

The popularity of Crownpeak's "digital experience management" platform with customers results primarily from its combination of excellent cloud capabilities and advanced functionality, including "digital quality management."

Crownpeak's emphasis on digital quality management ties in well with customers' increasing emphasis on the measurable effectiveness of delivered experiences. Crownpeak's merger with ActiveStandards, announced in April 2016, will help to increase this emphasis, particularly in highly regulated sectors such as financial services.

Crownpeak has an excellent partnership strategy in terms of points of interoperability with adjacent technologies from independent software vendors (ISVs).

CAUTIONS

Although an infusion of capital in 2016 raises the possibility that its marketing effectiveness will improve, recognition of its brand remains lower than that of many other vendors in this Magic Quadrant.

One of Crownpeak's primary selling points — SaaS — is no longer the differentiator it once was. Confusion and vagueness in the market about cloud-based capabilities, coupled with advances by competing vendors, is diluting Crownpeak's "cloud first" distinctiveness in this regard.

Crownpeak's installed base is still concentrated in the U.S. With only a quarter of its installed base in Europe, Crownpeak has yet to fully exploit its global capabilities to win additional business elsewhere. Prospective customers outside the U.S. should check Crownpeak's capabilities in their regions.

Episerver

STRENGTHS

Episerver has exploited its merger with Ektron skillfully by permitting Ektron customers to remain on their existing products, if they require this, while smoothing migration to Episerver's Digital Experience Cloud platform for those that desire that.

Episerver has strong momentum. It features in a growing number of selection processes that clients communicate to Gartner, and it is winning more business.

Episerver has an excellent pricing model. Its highly granular and flexible model facilitates modest beginnings, especially for midsize deployments, and enables gradual scaling up to meet the needs of large enterprises.

CAUTIONS

Episerver's focus on offering one tool to empower marketers may seem dated to decision makers whose digital strategy transcends what was the initial emphasis of digital marketing.

The overall effectiveness of Episerver's marketing continues to lag behind that of other Leaders. Gartner often sees Episerver omitted from selection processes when it would have been a good fit.

Episerver needs to continue to improve the effectiveness of its sales activities, for both direct sales and indirect sales via its channel partners. Gartner often sees competitors' offerings recommended by implementation partners, even though Episerver's would have been more suitable.

e-Spirit

STRENGTHS

The focus of e-Spirit's "flagship" product, FirstSpirit, on core, best-of-breed content management and interoperability benefits organizations looking to use their existing systems of record and, in some cases, competing content management systems.

e-Spirit has excellent case studies that show good interoperability with delivery tiers such as horizontal portals, as a "headless" component, and when providing content as a service (CaaS). These should encourage organizations planning to build customer portals that require excellent content management capabilities, or that need to push and pull content to and from new or emerging channels and Internet of Things touchpoints.

FirstSpirit fits well into broader solutions to support digitalization efforts, particularly when it is combined with the core capabilities of neighboring, third-party offerings, such as those for personalization, commerce and marketing automation.

CAUTIONS

Out of the box, e-Spirit's FirstSpirit offering does not have as comprehensive a set of marketing-friendly capabilities as many of the products of other vendors in this Magic Quadrant.

e-Spirit's lack of delivery tier capabilities is a shortcoming for organizations wanting to have these included as an option with the WCM offering. e-Spirit relies heavily on third-party products in this regard.

e-Spirit is outmatched by its immediate competitors in key areas such as partner ecosystem, marketing effectiveness and sales activities. Its brand is therefore less well known than those of its competitors.

eZ Systems

STRENGTHS

eZ Systems' customers value the commercially supported open-source eZ Platform (based on PHP and Symfony) and the premium edition, eZ Enterprise, for their low cost of ownership, flexibility and extensibility for developers. eZ Systems' decoupled architecture also allows for CaaS by supporting a "headless" content management system delivery approach, in addition to traditional WCM.

eZ Systems' user experience pays particular attention to content editors' requirements and preferences, and has direct appeal to organizations in the publishing and media sectors. The company's single-source publishing philosophy will also appeal to a broader range of commercial organizations as they prioritize the integrity of their brands' many channels.

eZ Systems has a clear and savvy approach to pricing that gives organizations a relatively easy start on the path to an increasingly advanced digital presence.

CAUTIONS

eZ Systems' marketing execution trails that of other vendors in this Magic Quadrant, although Gartner is seeing signs of improvement. eZ Systems appears on few of the shortlists seen by Gartner, even in situations for which it is well-equipped.

Unlike many of the vendors in this Magic Quadrant, eZ Systems lacks a strong ecosystem of ISV and system integrator partners in North America and Asia/Pacific. Its European ecosystem varies in this regard, with more partners in France and Norway than elsewhere in the region.

eZ Systems' product capabilities lag behind those of other vendors in this Magic Quadrant. Notably, its analytics offering is available only on a stand-alone basis and is not integrated into the user experience. This kind of approach is preferred by some media companies, but not necessarily by organizations in other industries.

GX Software

STRENGTHS

GX Software's customers frequently appreciate the combination of lower total cost of ownership (TCO) and high value presented by its XperienCentral offering. This is important as organizations choosing higher-priced WCM options from other vendors often fail to avail themselves of those offerings' full range of capabilities.

GX has a bold, yet realistic, vision for the WCM market as it evolves to support digital business initiatives. This vision includes enabling continuous customer experiences across various kinds of interaction. It also encompasses the customer experience beyond the area of marketing, with a view to ensuring satisfaction, loyalty and advocacy in customer support scenarios.

GX's customers rate the organization's support highly.

CAUTIONS

GX's marketing execution lags behind that of its competitors. Its presence in North America, the largest regional market for WCM software, is very low, as shown by, for example, its appearance on few of the customer shortlists seen by Gartner.

GX's traditional technology focus may seem limiting and overly tactical to organizations pursuing larger, more advanced and innovative digital business initiatives, for which decision influencers are increasingly on the business side.

Availability of out-of-the-box, supported connectors to adjacent third-party technologies is less than for the Leaders. GX focuses on the finance, telecommunications and government sectors, and on industrial brands and fan-based organizations (like sports companies and charities). Some GX customers in other industries report that an unexpectedly large amount of custom development and integration work is necessary to support their initiatives.

Hippo

STRENGTHS

Hippo has made significant progress in increasing its appeal to business users as a complement to its technical strengths. This includes considerable improvements to the user interface for business roles in Hippo version 11, which was released in July 2016.

Hippo's presence in the WCM market is growing significantly. Enterprises are hungry for another focused and innovative Java option. Increasing confidence in the commercially supported open-source model is a factor in the company's growing appeal.

Hippo's architecture is founded on a strongly principled separation of concerns, which equips its platform to better ensure the integrity of content across channels, touchpoints and devices. Its granular, object-oriented architecture also lends itself to serving content to external applications, including mobile apps, and environments, and to managing content in many languages.

CAUTIONS

Although Hippo's go-to-market strategy has improved significantly, its marketing execution lags behind that of some competitors, especially in the U.S. To continue growing in Europe, Hippo will need to make further efforts to differentiate itself from a large array of competitive offerings.

Hippo's open-source software (OSS) community (and associated partner ecosystem), although growing, is surpassed by some communities that are fueling the innovation and expansion of platforms offered by other vendors in this Magic Quadrant.

Some Hippo customers report a steep learning curve at the start of their efforts, along with some difficulty finding expertise. They say that more packaged components for integration would help.

IBM

STRENGTHS

Few vendors are as thoroughly equipped as IBM with technologies and services for WCM in the context of the entire "customer journey," from marketing to customer support. IBM Web Content Manager is tightly integrated into its sophisticated portal platform, IBM WebSphere Portal, which makes IBM a suitable choice for a broad range of digital experience use cases.

IBM's application of Watson's cognitive computing abilities to the digital experience is eye-catching. IBM is already using Watson for recommendations and determination of relevance, which could well reduce the amount of complicated, burdensome rule building that organizations have traditionally had to undertake in order to personalize digital experiences.

Reports from the market praise IBM Web Content Manager for its scalability and extensibility.

CAUTIONS

IBM's WCM proposition appeals primarily to an IT audience already dedicated to other IBM software and services, which may limit its growth when business leaders increasingly make digital business decisions. IBM rarely appears on Gartner clients' WCM shortlists unless they already have a strong relationship with IBM.

IBM retains a reputation for complexity. Its many technical features and options for integration are often a burden for organizations with relatively simple WCM requirements. Some customers report significant difficulties when installing and upgrading IBM's WCM software.

While IBM has made notable improvements to its user experience for business users, this is still not as intuitive or engaging as those of other Leaders.

Kentico Software

STRENGTHS

Kentico Software's CMS and EMS offerings are excellent value for money, with a comprehensive range of capabilities and a relatively low entry cost.

Given its relatively small size and origins in the Czech Republic, Kentico has done extremely well to develop a respectable number of impressive case studies and reference customers in the North American market, on which it focuses.

Kentico concentrates on offering users simplicity, in accordance with their requirements. Content contributors, for example, do not have to see, or navigate, functionality unsuited to their role. This approach is increasingly sought after by midsize and large organizations.

CAUTIONS

Kentico gives little focus to internal WCM scenarios. Its focus on external marketing scenarios may make it unsuitable for organizations looking to use WCM for other purposes, such as in a broad digital strategy.

Kentico's software is seen primarily as a midmarket offering. Large organizations considering using it should perform additional due diligence to ensure fitness for purpose and the availability of partner resources for the full program of work.

The breadth of capabilities offered by Kentico lags behind that of its immediate competitors. Decision makers should ensure that the available functionality is sufficient for their current and future requirements.

OpenText

STRENGTHS

OpenText's acquisition of HP Inc.'s WCM and related assets (including TeamSite, LiveSite and MediaBin) brings to the company a substantial installed base of large enterprises in which the software is used to address a broad range of content management and business process management needs.

OpenText has significantly improved its messaging, with an emphasis on the alignment of WCM with digital business themes ranging from the digital customer experience to the changing workforce and the digital supply chain.

OpenText offers comprehensive treatment for the extended customer journey and associated concepts such as "customers for life." Product capabilities and features, including the option to integrate and aggregate content and applications, improved control of templates, a more granular information architecture, and delegated administration, lend themselves well to digital experiences for customers, partners and employees at various stages of the life cycle.

CAUTIONS

OpenText offers three WCM products: OpenText Web Site Management, OpenText Web Experience Management and OpenText TeamSite, which was acquired from HP Inc. However, most customers strongly favor vendors that pursue a clear vision with a single flagship WCM offering.

OpenText's aggressive acquisition strategy requires it to focus on rationalizing and integrating its own solutions, too often at the expense of advancing the capabilities of any one of its offerings. The result is a lack of interoperability with third parties, as compared with Leaders in this market.

The strong demand for both best-of-breed functionality and interoperability with other vendors' software sometimes leads to the exclusion of OpenText from shortlists, due to its messaging's focus on offering a content platform for its broader "enterprise information management" vision. This is the case even in situations where OpenText would have been a good choice.

Oracle

STRENGTHS

Oracle has consistently pursued an excellent acquisition strategy to complement Oracle WebCenter Sites, its flagship WCM offering. This includes the acquisition of innovative companies that can help drive the effectiveness of a digital business strategy.

Oracle demonstrates good vision, particularly with regard to its cloud and mobile capabilities and related roadmaps.

Oracle's WebCenter Sites provides comprehensive support for the scenarios that generate the most demand in the WCM market, such as digital marketing effectiveness and delivery of contextualized experiences.

CAUTIONS

Oracle WebCenter Sites appeals strongly to IT organizations already committed to Oracle software. Organizations that prefer more heterogeneous application environments should undertake additional due diligence to ensure the required levels and types of interoperability are supported.

Gartner rarely sees Oracle WebCenter Sites included in selection processes, even in contexts where it would have been a good fit.

A disadvantage of Oracle's acquisition strategy is a nearly continual influx of sometimes overlapping technologies. Decision makers evaluating Oracle should seek detailed advice and gain a clear understanding of the suitability of individual solution components for their digital strategy.

Progress

STRENGTHS

In the past year, Progress has considerably improved its vision, positioning and overall strategy in the WCM market with its DigitalFactory cloud offering. It has also executed well, which has led to substantial growth, especially in the lucrative North American market.

Progress' WCM customers report that it is very responsive, with a support organization that is engaged and effective.

Progress' mobile and cloud capabilities are more advanced than those of most other providers. Its DigitalFactory platform enables customers to readily incorporate mobile apps into their digital strategy. Progress' Digital Experience Cloud, although intended to appeal mostly to digital

marketing leaders, offers a glimpse of the unique value of a cloud-based offering that complements WCM.

CAUTIONS

Although the basic content management functions, such as authoring, of Progress Sitefinity are regarded as easy to use, other vendors offer more accessible and intuitive interfaces for more advanced functions, such as managing approval workflows, templates and permissions.

Although Progress' strategy has improved considerably since it acquired WCM technology from Telerik in 2014, its vision lags behind that of the Leaders, as does Sitefinity. Except in areas like mobility and the cloud, Progress' WCM story and product are not yet leading-edge.

Progress has much work to do to appeal more readily to digital business influencers at a strategic level. Although most WCM providers have shifted focus to appeal to digital marketing leaders, Progress' loyal customers are predominantly in the IT departments of midsize enterprises.

SDL

STRENGTHS

SDL maintains a strong proposition with its flagship WCM product, SDL Web, for organizations that prioritize content integrity and relevance across digital and analog channels, devices, regions and media. SDL differentiates itself by improving and streamlining translation and localization, so that customers avoid having to use many third-party products and services for this costly process.

SDL's innovative Adaptive BluePrinting capability lends itself to context-aware, omnichannel scenarios. It can play a fundamental role in managing the complexity of the global web presence of multibrand, multiregion organizations.

SDL's focus on core content management, along with supporting products for complex technical documentation, product catalogs and translation management, puts it in a better position than some vendors to provide a global WCM system for digital marketing and digital experience technology solution landscapes.

CAUTIONS

SDL's appointment of new leaders and divestiture of assets have allowed competitors to increase their lead over SDL in the WCM market. SDL has sold off some of its campaign and e-commerce capabilities to pursue a best-of-breed strategy and focus on integration with third-party solutions.

Mixed marketing messages and a shift in focus have left some SDL customers confused and concerned about the company's long-term direction. Some recent successes, in which SDL has replaced big brands, may give it momentum, however.

Some customers report that SDL's granular architecture, flexibility and extensibility come at the cost of complexity. Some also report unexpectedly high TCO, partly due to the need to acquire specialized skills. To help mitigate such risks, decision makers should examine SDL's recently introduced Digital Experience Accelerator for SDL Web (a best-practice implementation for SDL Web) and SDL's cloud offerings.

Sitecore

STRENGTHS

Sitecore has an industry-leading, compelling and executable vision for a "contextual delivery machine." The Sitecore Experience Database (xDB), which promises to deliver the long-sought-after "360-degree view of the customer," contributes to this vision.

Few WCM vendors match Sitecore's understanding of the latest digital marketing priorities, practices and technologies. Sitecore continually incorporates into its offering support for leading practices, such as customer journeys, cross-channel marketing, multivariate testing and continuous experiences.

More than most WCM vendors, Sitecore is fostering and learning from innovation by its customers, partners and the market as a whole. For example, the Sitecore Business Optimization Services team directly benefits customers that are aiming for digital marketing and business leadership while employing the Sitecore platform.

CAUTIONS

Some reports from the market suggest that customers' interactions with Sitecore are not as satisfactory as they desire or might expect. Reportedly, response times can be slow, and representatives of Sitecore may not always be proactive in providing key information applicable to the customer's scenario.

Sitecore has undergone a transition with respect to its pricing, and its handling of the changes has caused some confusion in the market. Interested parties should ask about the different pricing models available and the resulting cost of ownership.

Sitecore's cloud capabilities lag behind those of other Leaders and of Visionaries. This is partly due to its dependency on Microsoft Azure for infrastructure as a service and platform as a service. It is also attributable to a narrow vision for merely a series of cloud deployment options.

Squiz

STRENGTHS

Squiz's offering is a combination of its OSS Customer Experience Platform (CXP) and sound support and commercial backing – which amounts to a business model popular with decision makers. This combination is becoming even more important as the complexity of solutions increases, along with the need for interoperability.

Squiz displays a good understanding of the market's current and likely future dynamics, as shown by its ISV partnership strategy. Its partners include Marketo and SugarCRM.

Customer feedback is complimentary about the ease of use of Squiz's CXP, its low TCO, high extensibility and strong product qualities.

CAUTIONS

Squiz's presence in North America is less than it needs to be in order to represent serious competition to other vendors in this Magic Quadrant that are making significant advances in this region and in the overall market.

Squiz has invested less heavily than its main competitors in an ecosystem of implementation partners. Decision makers should therefore ensure sufficient program resources are available in all required regions.

Recognition of Squiz's brand is relatively low, compared with its main competitors. As a result, it is often omitted from selection processes in situations where it would be a good fit.

Vendors Added and Dropped

We review and adjust our inclusion criteria for Magic Quadrants as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant may change over time. A vendor's appearance in a Magic Quadrant 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

Kentico Software.

Dropped

HP — all relevant assets have been acquired by OpenText.

Microsoft — its focus is now the digital workplace.

Inclusion and Exclusion Criteria

We used the following inclusion criteria for each vendor:

Total WCM software revenue. The vendor's total WCM software revenue for 2015 had to exceed \$16 million.

- Total WCM software revenue *includes* revenue generated by sales of WCM software and software maintenance and support services. It 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 one year and a strategy that supports further geographical 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 determined that there was good evidence for 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 that 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-one sessions 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.

Each vendor had to 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 TVs) 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 or 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/record evaluates how well the WCM offering matches buyers' requirements at the time of 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 (September 2016)

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 by 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
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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 (September 2016)

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 in the future. 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 those for CRM, DAM and multichannel campaign management).

Visionaries

Visionaries are forward-thinking and technically focused. Their products may, for example, have unique multilingual capabilities or they may set the market's direction through innovation and product development. To become Leaders, they need to improve some of the core aspects of their offerings and increase their Ability to Execute. They may also 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 narrowness of focus can affect their ability to outperform their competitors or to be more innovative. Niche Players often support only those applications that apply to the 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 your particular needs. A Challenger, a Niche Player or a Visionary could be the best choice for your organization.

Market Overview

The WCM market is poised to split into two segments, driven by two distinctly different strategic perspectives: "business as usual" and "business transformed."

"Business as usual" reflects healthy progress in the direction that the market has been moving in recent years. Digital marketing effectiveness is the use case that best captures the essence of this movement. In this regard, web presence is regarded as a pivotal part of a broader multichannel, marketing strategy, and personalized content is essential to have an impact over the selected channels. The democratization of capabilities has provided greater agility for marketers and enabled WCM to be formally regarded as key to delivering engaging digital experiences to multiple audiences.

For many organizations deploying WCM, however, "business as usual" won't be enough. Technological advances are enabling a new level of possibility, and the aspirations of innovative companies are increasing accordingly. Increasingly, aspirations are directed toward consistent achievement of the "best next customer experience" and draw on concepts and trends described in "Digitalization Is Shaping the Future of Web Content Management" and "Reanimate Your Content Strategy for the Best Next Customer Experience."

For some vendors, the WCM market is already too crowded, with differentiation sometimes requiring the explanation of technological subtleties. This combination of factors will lead to WCM being regarded as a mission-critical component for ensuring the effectiveness of ambitious digital business strategies, the success of which will also be driven by the following customer-centric, paradigm-shifting perspectives:

Conceptual: Individuals will need to be engaged "further upstream." "Customers" will need to be regarded as anyone who should have an interest in a brand, not just people who have already interacted with a company proactively. Furthermore, the relationship with a customer should encompass the lifetime journey of that customer. The concept of "customers for life" will catalyze a transformation in how companies offer products and services and in what they will do to keep established customers.

Communicational: The notion of "outbound" and "inbound" communications will be replaced, as a strategic imperative, by the simple but powerful notion of "continuous communication." WCM will play an integral role in ensuring the relevance, sensitivity and effectiveness of all such communication. Conversations will start earlier in the customer relationship and will need to evolve with the ongoing journey of that customer.

Architectural: WCM will no longer be so monolithic. It will become more modular, granular and atomic to facilitate delivery of the "best next digital experience." Cloud-first strategies will win the day, with cross-channel continuity fueling ongoing customer interaction. Microservices with a high level of interoperability will enable WCM elements to be coupled with different sets of third-party technologies, depending on the requirements of the current phase of the customer's journey.

The most exciting days in the WCM market are still ahead. Decision makers will need to decide early which perspective they identify with most readily, and ensure their evaluation criteria for shortlisting vendors are weighted accordingly.

Acronym Key and Glossary Terms

CaaS	content as a service
DAM	digital asset management
ISV	independent software vendor
OSS	open-source software
TCO	total cost of ownership
WCM	web content management

Evidence

The analysis in this Magic Quadrant 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 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 research unit.

Evaluation Criteria Definitions

Ability to Execute

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

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

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

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

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

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

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

Completeness of Vision

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

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

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

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

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

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

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

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



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