Magic Quadrant for Horizontal Portal Products

David Gootzit, Gene Phifer, Ray Valdes

New entrants provide additional options for enterprises willing to consider open-source and software-as-a-service alternatives for horizontal portal functionality. To differentiate their offerings, horizontal portal vendors are incorporating support for enterprise mashups and social networking.

WHAT YOU NEED TO KNOW

Oracle's acquisition of BEA Systems in April 2008 continues the consolidation trend in the horizontal portal market. Although this is a mature space, a new wave of entrants driven by open-source, software as a service (SaaS) and cloud-based delivery mechanisms will change the competitive dynamics in this market. Alternative delivery models for horizontal portal functionality will challenge the traditional vendors' on-premises, licensed software models.

Through the first half of 2008, new portal deals continue to be dominated by a core group of high-profile, enterprise-focused software vendors (see "Magic Quadrant for Horizontal Portal Products, 2007"). However, three new vendors managed to gain enough visibility and credibility to qualify for our Magic Quadrant for this market.

Two commercial open-source vendors, Liferay and Red Hat JBoss, have experienced some successes in enterprise settings, although they still need to prove themselves for some portal scenarios. Liferay and Red Hat have demonstrated the ability to monetize open-source portal initiatives. Although several other commercial, open-source, horizontal portal vendors and numerous open-source, horizontal portal initiatives (see "Open Source and Portals, 2008") are involved in this market, Liferay and Red Hat have achieved the most enterprise penetration of open-source horizontal portals and are the only open-source portal alternatives that meet our inclusion criteria.

Covisint has delivered identity and access management and horizontal portal features through a SaaS model. This vendor has expanded beyond its automotive roots and now serves other selected industries.

Interest in the general market in a SaaS horizontal portal has been fueled by Microsoft's SharePoint Online initiative. Other vendors are likely to announce SaaS horizontal portal offerings during the next year (see "Enterprise Portals in the Cloud"). Many of these players will be established horizontal portal players; however, the entrance of a primarily consumer Web player (such as Google), or one or more of the consumer Web personal start page vendors, is also possible. Mitigating revenue cannibalization will be a challenge for long-standing horizontal portal vendors launching SaaS initiatives.

Organizations evaluating portal functionality generally consider vendors with experience in business applications or software infrastructures. In some cases, this heritage dictates areas of functional strength and weakness that are important to consider in any evaluation. Selecting a horizontal portal product requires careful vendor evaluation to make appropriate trade-offs among functional capabilities, architectural fit and strategic direction. Use Gartner's Magic Quadrant in combination with other tools, including analyst consultations, when selecting a horizontal portal.

The 2008 Magic Quadrant for Horizontal Portal Products evaluates 12 vendors, which is an increase of two companies from 2007. The BEA acquisition was balanced by three new entrants.

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Figure 1. Magic Quadrant for Horizontal Portal Products

As of September 2008
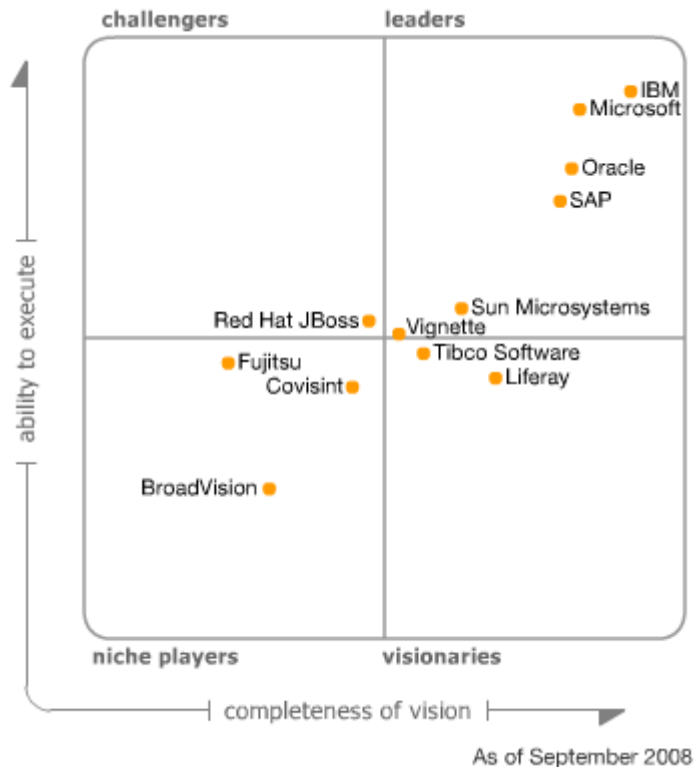
Source: Gartner (September 2008)

Market Overview

After two major waves of vendor consolidation, the horizontal portal market continues to coalesce around a core group of large independent software vendors (ISVs). In many ways, the portal market reflects one area of competition among the technology stack vendors, although two of the three new entrants demonstrate that this isn't the entire story. Portals play strategic roles in the stack strategies of several large ISVs, including IBM, Oracle and SAP, whether they serve as the focus of a service-oriented architecture (SOA) vision, as the foundation of their applications' interface strategies or as the keystone of their productivity offerings.

Since its inception in 1998, the portal product market has undergone significant consolidation. However, this market is likely to experience a major shift driven by open-source software, SaaS delivery models and cloud computing. These two forces will cause this relatively stable market to expand dramatically during the next few years. IBM, Microsoft, Oracle, SAP and Sun Microsystems will participate in this expansion, with new offerings that parallel their established portal products. As the new entrants to this year's Magic Quadrant demonstrate, these three trends are already affecting the horizontal portal space. Additional new players are also likely to emerge, including consumer Web giants, such as Google, and other open-source portal alternatives.

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Oracle's acquisition of BEA has significantly affected the competitive dynamics of the horizontal portal space, but two additional trends must be noted:

- There has been increasing interest in and significant adoption of Microsoft Office SharePoint Server 2007 (MOSS).

- Some enterprises are demonstrating a willingness to use open-source portal alternatives, especially Liferay or Red Hat JBoss, for some portal scenarios.

By 2011, Gartner expects at least 10% of new enterprise portal projects in the Global 2000 to use open-source horizontal portal frameworks. The Sun-Liferay agreement (see "Sun and Liferay Plan to Brighten Open-Source Enterprise Portals"), and the completion of the second generation of vendor-independent portlet standards, including Web Services for Remote Portlets (WSRPv2) and Java Specification Request (JSR 286), is likely to promote interest in open-source portal alternatives. The addition of interportlet communication in JSR 286 should promote interest in the adoption of open-source portal alternatives supporting this specification.

Mashups, lightweight composite applications based on Web-oriented architectures (WOAs), could emerge as alternatives to horizontal portal frameworks for creating enterprise Web environments (see "'Mashups' and Their Relevance to the Enterprise"). Business users empowered to create Web-based composite applications could use this functionality to aggregate content and integrate applications. These are key functions of enterprise portals based on horizontal portal frameworks. Tools from stand-alone mashup vendors are frequently leveraged for use with horizontal portals, rather than as replacements for them. Building an entire enterprise Web presence using mashup tools would require shifting the onus of personalization completely to individual users.

Like mashup features, social-networking capabilities are being incorporated by horizontal portal vendors in their core portal offerings or as complementary, integrated add-ons. For intranets, social networking offers an alternative to traditionally supported organizing principles offered by horizontal portal products. Although horizontal portals frequently rely on multiattribute personalization, social networks rely on peer-selection, self-selection and peer recommendations. There is also potential for new entrants from this background, although the most significant potential social-networking entrants from the consumer Web haven't expressed interest in the enterprise sector.

Several enterprise software vendors in related markets, including several that target business process management (BPM) suites, provide some functionality traditionally associated with horizontal portals. To differentiate themselves, we may see "process portals" pushed by some of these vendors, as well as established horizontal portal providers in response.

General interest in Web 2.0 (see "Key Issues for Web 2.0 and Beyond, 1H08") and Enterprise 2.0 (see "In 2008, Enterprise Web 2.0 Goes Mainstream") is driving several horizontal portal vendors to continue enhancing support for Ajax or alternative Rich Internet Application (RIA) technologies to provide rich user interfaces (UIs), as well as social-networking features and enterprise mashup capabilities. Several horizontal portal vendors have announced plans for or have enhanced their capabilities to support enterprise mashups in 2008. During the remainder of 2008 and the first half of 2009, expect to see intensive marketing efforts regarding vendors' social-networking capabilities.

Market Definition/Description

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

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- Employees — business-to-employee (B2E)

- Customers — business-to-consumer (B2C)

- Business partners — business-to-business (B2B)

A portal product is a packaged software application that's used to create and maintain enterprise portals. These products can be used to design vertical or horizontal portals.

- Vertical portals focus on accessing specific applications or business functions.

- Horizontal portals seek to integrate and aggregate information from multiple cross-enterprise applications, as well as specific line-of-business tools and applications.

Most companies looking for portal functionality will deploy horizontal portal products, although many types of suites also contain horizontal portal frameworks. Portal services will be embedded in multiple product types, and an increasing number of enterprises will use these other product packages to obtain portal functionality. Global 2000 organizations are increasingly evaluating open-source alternatives for portal projects. SaaS and cloud-based offerings are also likely to challenge on-premises, server-based offerings.

Inclusion and Exclusion Criteria

To be considered for the Magic Quadrant for Horizontal Portal Products, vendors must meet four minimum criteria:

- The vendor must have achieved at least $3 million in annual portal-related product and service revenue during 2007.

- The vendor must provide sales and support for the portal product in at least two of the following five geographic regions: North America; Latin America; Europe, the Middle East and Africa (EMEA); Japan; and the Asia/Pacific (APAC) region.

- The vendor must be able to sell an enterprise portal for deployment in a variety of scenarios, including B2E, B2B and B2C.

- The vendor must provide portal functionality that meets all Generation 1 criteria, as defined in previously published Gartner materials (see "Portals Are the 'Swiss Army Knives' of Enterprise Software").

Added

Three vendors have been added to this year's Magic Quadrant analysis:

- Covisint is a SaaS portal provider focused on four industry segments.

- Liferay is a commercial, open-source vendor that now meets the inclusion criteria and has been receiving increased interest from Global 2000 organizations.

- Red Hat JBoss — a commercial, open-source vendor — now meets Gartner's inclusion criteria and has been receiving increased interest from Global 2000 organizations.

Dropped

As a result of its acquisition by Oracle in April 2008, BEA isn't included in this year's analysis. Oracle has indicated plans to leverage much of BEA's portal technology and portal-related modules as part of its user interaction strategy (see "Oracle's Post-BEA Middleware Road Map:

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Product Recommendations for Users"), although the foundation for Oracle's strategic portal and user interaction efforts will be WebCenter Framework.

Evaluation Criteria

Ability to Execute

Enterprises evaluating horizontal portal technology have wide-ranging requirements for different audiences. A breadth of functionality supporting different portal deployment scenarios, long-term vendor viability, a demonstrated track record of meeting customer needs and successfully expanding market presence are all important criteria for ability to execute in this market. A vendor that may not be rated highly in terms of its ability to execute in the general horizontal portal space may still provide compelling, or even leading-edge functionality supporting a particular portal deployment scenario or companies in a particular industry.

Table 1. Ability to Execute Evaluation Criteria

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

Source: Gartner

Completeness of Vision

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

Table 2. Completeness of Vision Evaluation Criteria

Evaluation Criteria	Weighting
Market Understanding	high
Marketing Strategy	high
Sales Strategy	low
Offering (Product) Strategy	high
Business Model	low
Vertical/Industry Strategy	high
Innovation	high
Geographic Strategy	standard

Source: Gartner

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Leaders

The leaders in this Magic Quadrant have a full range of capabilities to support a range of portal deployment scenarios and have demonstrated consistent product delivery in meeting customer needs for a substantial period of time. Leaders have delivered significant product innovation and have been successful in selling to new customers across industries.

Challengers

Red Hat JBoss is the Magic Quadrant's only challenger. It has demonstrated execution across several industries, as well as in North America, Europe and Latin America, but hasn't demonstrated vision similar to that of the market leaders.

Visionaries

Liferay and Tibco Software are visionaries in this year's Magic Quadrant for Horizontal Products. Tibco has exhibited vision in its portal-based composite applications and its portal's use of Ajax, but it has not exhibited the scope of delivery or the market presence of the leaders. Although Liferay exhibits vision across a range of portal functionality, it's a small company that doesn't have the market presence of the leaders.

Niche Players

The niche vendors in the horizontal portal product market focus on a limited set of portal deployment scenarios, have limited geographic presence outside their home markets or focus on a narrow set of industries.

Vendor Strengths and Cautions

BroadVision

Strengths

- BroadVision offers strong functionality supporting B2C portal deployments, especially those with an e-commerce component.

- The combination of BroadVision's Kukini workbench, BroadVision Process Services and BroadVision Portal can be used to rapidly deploy portals.

Cautions

- BroadVision has improved its financial position, including delivering several profitable quarters; however, it has experienced several quarters of decreasing overall revenue, including declining software license revenue.

- BroadVision lacks portal-specific standards support — it has no support for JSR 286 or WSRPv2.

- By refocusing its branding on the term "Business Agility Suite" in its marketing efforts and the Kona and Kukini platforms from a technology perspective, BroadVision risks being perceived as shifting away from its traditional horizontal portal technology toward a Kukini-based development toolkit approach and a B2C focus.

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Covisint

Strengths

- Covisint offers one of the few SaaS horizontal portal options currently available, and a SaaS model generally enables faster deployments.

- Covisint's offerings include integrated security features such as user administration, provisioning, user access and identity federation.

- Covisint translates industry expertise into business service layers for particular industries that result in portal templates and connectors to systems relevant to the industries on which it focuses.

Cautions

- Although Covisint does not offer interportlet communication support — it will support JSR 286 in its Collaboration Portal and vertical portal offerings by the end of 2008.

- Covisint combines vertical-specific functionality with its portal and identity management offerings for four industries: automotive, healthcare, government and financial services; expansion to other verticals is possible in the future.

- When all of Covisint's offerings are taken into account, it has a large installed base; however, only a relatively small customer base uses its Collaboration Portal offering as a truly horizontal portal.

- Covisint offers few out-of-the-box portlets to connect to the business applications, content management tools and content repositories typically deployed on premises by organizations.

Fujitsu

Strengths

- Fujitsu is a large, financially strong, global IT services, hardware and software provider offering a full technology portfolio that enjoys a strong position in its Japanese home market — one that historically has not been well-addressed by non-Japanese IT vendors.

- Some success with Interstage BPM in EMEA and North America means a cross-selling opportunity for additional Interstage Portal Licenses in those markets.

Cautions

- Fujitsu Interstage Portal relies on an integration with Microsoft NetMeeting for embedded collaboration functionality, resulting in a limited set of portal-based collaboration features.

- Although Fujitsu actively sells other elements of its Interstage product family globally, its Interstage Portal has achieved little market penetration outside Japan, other than limited success in international subsidiaries of Japanese companies.

- Fujitsu's capabilities to address growing market requirements for social-software capabilities lag behind those of many of its portal competitors.

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IBM

Strengths

- WebSphere Portal has been successfully deployed by a large customer base across a wide range of complex deployment scenarios, including high-scalability environments.

- WebSphere Portal supports mashup creation (via IBM Mashup Center) and leverages other complementary offerings, including Lotus Connections (for social networking), to inject Web 2.0 technologies into the enterprise.

- IBM offers a compelling vision for unified application compositing and deployment across a variety of UIs, including WebSphere Portal, Lotus Notes and Lotus Expediter.

- Installation times have improved with WebSphere Portal 6.1, although configuration for more-complex portal projects can still result in extended deployment times in some scenarios.

Cautions

- Some WebSphere Portal users that leverage Lotus Web Content Management (previously known as Workplace for WCM) report difficulty in managing the portal content creation process across the two environments.

- WebSphere Portal requires significant investment in the WebSphere Platform and associated skill sets.

- WebSphere Portal can be overly complex and costly for simple, content-centric portals.

- Customers and prospects report dissatisfaction and confusion with IBM's Processor Value Unit pricing methodology.

Liferay

Strengths

- Liferay is rapidly gaining market traction and visibility out of proportion to the company's small size.

- An open-source licensing model and the May 2008 agreement with Sun reduce perceptions of risk associated with a small vendor.

- The Sun-Liferay agreement gives Liferay access to Sun's JSR 286 portlet container and WSRPv2 implementation.

- Liferay Portal 5.1 includes some built-in content management, collaboration and social-networking features; an interface to Facebook; support for portlets built in Ruby and Python; and support for Google Gadgets.

Cautions

- Liferay is a small company, with limited experience in the enterprise sector and a limited (albeit growing) track record with Global 2000 scope deployments.

- Liferay offers few prebuilt portlets to connect to commonly used content management systems, content repositories, collaboration tools and business applications.

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- Liferay lacks an extensive implementation partner network.

- As a commercial open-source company, Liferay faces challenges in monetizing enterprise use of Liferay Portal code, so its resources could remain constrained even if adoption of Liferay Portal continues to accelerate.

Microsoft

Strengths

- MOSS 2007 is experiencing significant adoption by enterprises with fewer than 15,000 employees as an enterprisewide B2E portal, as well as some penetration in larger organizations for that use case, for content-centric partner extranets and customer-facing Web presences. MOSS 2007 has clearly expanded beyond departmental-level deployments and is being used as an enterprisewide B2E portal in many enterprises.

- The SharePoint Online Standard offering represents the first attempt by a leading horizontal portal product vendor to provide a SaaS horizontal portal. SharePoint Online is still inadequate for many horizontal-portal scenarios, but shows promise for departmental-level portal requirements.

- Use of MOSS 2007 for team-based collaboration and document management is driving MOSS use for other initiatives, including portals.

- Microsoft is successfully fostering initial MOSS 2007 deployments through Enterprise Licensing agreements, although enterprises should be aware that these agreements rarely cover all the MOSS 2007 client access licenses an organization would need for all employees.

Cautions

- MOSS 2007 does not offer full support for enterprise mashups or social networking. Microsoft's mashup-related efforts are split between its consumer Web-targeted Popfly initiative and promoting MOSS 2007 as a platform for WebPart-based composite applications. MySites are useful, but MOSS 2007 doesn't represent a full enterprise social-networking platform.

- Larger enterprises that have completed or are in advanced stages of their deployments report several issues, including a lack of content-replication features among independently configured MOSS installations; the need for network acceleration software for remote locations, if centralized server farm approaches are implemented; and challenges in fostering cultural adoption of MySites on an enterprisewide basis.

- MOSS is not yet being widely deployed for high-volume, transactional portals. Although some organizations pursue custom WebPart creation for applications access, the relative lack of Business Data Catalogue use in B2E portals indicates MOSS isn't being used widely to access applications.

- Widespread interest and adoption of MOSS means locating resources for new projects will be time-consuming and costly, and MOSS users indicate Microsoft, although actively working to address the issue, doesn't have adequate support structures and skills in place for larger, more-complex MOSS deployments.

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Oracle

Strengths

- Oracle plans to incorporate much of BEA's most-interesting technology into its strategic portal and user interaction platform offerings, including functionality found in the former BEA Ensemble, Pathways and Analytics offerings, as well as the .NET Accelerator. Although none of these will be available as individual products, the incorporation of this functionality into WebCenter Services and WebCenter Suite will interest prospects looking for mashup functionality; portal analytics capability; social-computing features, such as social networking; and simplified integration of .NET applications with Java-based portals.

- By continuing to offer the WebLogic Portal products, Oracle gains a credible, proven offering for high-volume, large-scale, customer-facing portals.

- Oracle can provide users with portal and enterprise content management (ECM) capabilities (Universal Content Management), although the integration available with Universal Content Management depends on which of Oracle's portal offerings is also leveraged.

- Oracle is an aggressive adopter of portlet-related standards and is an early adopter of JSR 286 (Portlet 2.0) and WSRPv2.

Cautions

- WebCenter Framework, the basis for Oracle's two strategic portal and user interaction offerings (WebCenter Services and WebCenter Suite), lacks a significant track record for transactional portals or portals supporting large numbers of concurrent users accessing applications.

- Oracle's plan to integrate large components of its four portal products — including AquaLogic User Interaction (ALUI) with WebCenter Framework as the WebCenter Suite Offering — is a significant technical challenge, and full integration may not occur within 12 to 18 months. WebCenter Spaces, which is part of the plan for the WebCenter 11g release, includes some of the functionality also delivered by ALUI.

- Oracle faces a significant challenge to ensure that its prospective customers, its established portal users and its new Enterprise 2.0 sales force understand the use scenarios for the four portal and user interaction offerings on its active price list (WebCenter Services, WebCenter Suite, WebLogic Portal and Oracle Portal), as well as the relationships among the four offerings.

- Oracle has committed to support products in its "Continue and Converge" classification, including Oracle Portal, ALUI and WebLogic Portal, for a minimum of nine years. However, there is a significant risk that existing customers, especially those on older versions of the BEA portal products, will migrate to a competitor's portal product rather than pursue WebCenter Framework as the technical foundation for their portal projects.

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Red Hat JBoss

Strengths

- Red Hat is a leading commercial, open-source vendor, offering multiple products under open-source licenses ranging from server operating systems to a complete middleware stack, including a Java 2 Enterprise Edition application server and horizontal portal.

- An open-source licensing model reduces perceived investment risks, and Red Hat's support for important portal-related standards is expected to minimize risks of vendor lock-in with JBoss Portal.

- Red Hat's JBoss Enterprise Middleware platform, including JBoss Portal, is gaining traction among Global 2000 organizations.

Cautions

- Red Hat positions JBoss Portal as a custom development platform, rather than as an out-of-the-box portal solution, reducing its attractiveness to companies looking for less-complex portal products that can be rapidly implemented, albeit without the flexibility delivered by an alternative such as Red Hat JBoss.

- Red Hat's JBoss Portal requires JBoss Application Server.

- Red Hat's JBoss Portal trails several competitors' shipping products' support for enterprise mashup functionality.

- Red Hat's JBoss Portal trails several commercial portal vendors in portal-embedded collaboration functionality, as well as out-of-the-box portlets for commonly used enterprise applications and tools.

SAP

Strengths

- SAP Portal users that have adopted Web Page Composer indicate that it has greatly improved the portal content creation process in SAP Portal, although there are still multiple environments to create portal content within SAP Portal, including the Portal Content Studio.

- The Accelerated Application Delivery (AccAD) add-on for SAP NetWeaver promises to improve SAP Portal performance for remote users.

- SAP's large catalog of iViews, which provide out-of-the box connectivity and integration between SAP Portal and SAP business applications, adds great value for SAP application users.

- SAP Portal continues to play a central role in the NetWeaver stack and SAP Business Suite, guaranteeing use by most SAP organizations of SAP Portal for access to the most-recent versions of SAP's business applications.

Cautions

- Most SAP Portal deployments are limited to providing access to SAP applications. End-user feedback indicates SAP Portal UI rigidity has constrained use cases for SAP Portal, and few non-SAP business application customers use SAP Portal.

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- SAP lags behind several competitors in delivering enterprise mashup functionality.

- SAP Portal deployments have historically lacked a significant collaboration element, which SAP has sought to address with its Collaboration Portal functionality. However, this has not yet been widely adopted by SAP Portal users.

- Although SAP added support for JSR 168 with NetWeaver 7.1, it continues to trail several of its competitors in support for some portal-related standards — specifically, it has not yet committed to supporting JSR 286 (Portlet 2.0).

Sun Microsystems

Strengths

- Sun's new partnership with Liferay — in which it will contribute technology to Liferay's code base, while Sun will sell a subset of Liferay Portal combined with Sun technology — has generated renewed market interest in Sun as a portal provider.

- Sun Java System Portal Server has demonstrated scalability in many high-demand portal deployments.

- Sun includes Sun Java System Portal Server in its Java Composite Applications Platform System (CAPS), resulting in a strong compositing environment.

Cautions

- The market interest generated by the Liferay announcement has yet to translate into significant new sales of Sun Java System Portal Server.

- Version 7.2 is the last major release of Sun Java System Portal Server. Sun is developing a next-generation portal, currently referred to as Project WebSynergy. Once completed, Sun will have a difficult time convincing established customers and prospects to adopt the eventual productization of Project WebSynergy, rather than rely on the open-source Liferay portal exclusively.

Tibco Software

Strengths

- Tibco has continued to build out the capabilities that support its Active User Experience vision, adding several new offerings complementary to PortalBuilder and General Interface, including Tibco PageBus, Tibco Ajax Message Service and Tibco Forms. These products are likely to be compelling for enterprises interested in portals with strong Ajax capabilities and end-user-driven compositing.

- Tibco has demonstrated the ability to meet the needs of Global 2000 enterprises for complex integration portals and portal-BPM projects.

- Tibco offers a well-integrated BPM-portal offering, as well as an overall SOA vision.

Cautions

- Although Tibco was one of the first portal vendors to add Ajax support, this early differentiator did not translate into accelerated portal market penetration. Other Active User Experience technology components have yet to attract significant new customers to Tibco PortalBuilder.

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- Tibco PortalBuilder suffers from limited market penetration and limited visibility. Tibco PortalBuilder is rarely considered by enterprises that aren't established Tibco customers.

Vignette

Strengths

- Vignette Portal has proven scalability and is the foundation for numerous customers' high-demand B2C portals.

- A significant installed base for Vignette's ECM offerings provides a ready-made market for cross-selling Vignette Portal and complementary offerings such as Vignette Builder and Vignette Community Services.

- Vignette offers a strong, tightly integrated product for enterprises looking for a combination of leading content creation capabilities and a portal-based delivery mechanism.

Cautions

- Although Vignette Application Portal has demonstrated its suitability for portal-based composite applications, Vignette trails several competitors in supporting end-user enterprise mashup creation.

- Vignette is facing challenges expanding its presence in the portal market, having failed to achieve significant Portal license growth for the past two years.

- Although Vignette's newest functionality has applicability for internally and externally focused portals, much of its marketing focuses on B2C portal scenarios.

RECOMMENDED READING

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

"Oracle's Post-BEA Middleware Road Map: Product Recommendations for Users"

"Enterprise Portals in the Cloud"

"Feedback From SharePoint Conference Attendees Confirms Enterprise Portal Use Trends for Office SharePoint Server 2007"

"Open Source and Portals, 2008"

"IBM Enterprise Offering Brings Mashups Closer to Mainstream"

"Sun and Liferay Plan to Brighten Open-Source Enterprise Portals"

Vendors Added or Dropped

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

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Evaluation Criteria Definitions

Ability to Execute

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

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

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

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

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

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

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

Completeness of Vision

Market Understanding: Ability of the vendor to understand buyers' wants and needs and to translate those into products and services. Vendors that show the highest degree of vision listen 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 Web site, 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.

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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.

REGIONAL HEADQUARTERS

Corporate Headquarters
56 Top Gallant Road
Stamford, CT 06902-7700
U.S.A.
+1 203 964 0096

European Headquarters
Tamesis
The Glanty
Egham
Surrey, TW20 9AW
UNITED KINGDOM
+44 1784 431611

Asia/Pacific Headquarters
Gartner Australasia Pty. Ltd.
Level 9, 141 Walker Street
North Sydney
New South Wales 2060
AUSTRALIA
+61 2 9459 4600

Japan Headquarters
Gartner Japan Ltd.
Aobadai Hills, 6F
7-7, Aobadai, 4-chome
Meguro-ku, Tokyo 153-0042
JAPAN
+81 3 3481 3670

Latin America Headquarters
Gartner do Brazil
Av. das Nações Unidas, 12551
9° andar—World Trade Center
04578-903—São Paulo SP
BRAZIL
+55 11 3443 1509

Gartner