Magic Quadrant for Horizontal Portals

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The portal market continues to consolidate, with most enterprises focusing on a core set of strategic providers. Yet, emerging demands and technology disruptions are raising the bar for value, as well as opening opportunities for new approaches and new entrants.

What You Need to Know

The field of viable portal vendors has narrowed considerably, dropping from more than 50 vendors in 2003 to fewer than a dozen in 2010. However, the consolidation of traditional portal vendors doesn't necessarily mean the commoditization of the market. In light of pressing business needs to improve the user experience across channels, and amidst the innovations of Web 2.0 and the cloud, making the right portal choice is more important than ever.

The major technology shifts toward Web 2.0, the cloud and business versus the IT influence are galvanizing the portal market. Portals provide a single, personalized point of access to relevant information, processes and people. They appeal to business leaders as a means to improve employee productivity and collaboration, extend business processes and applications to broader audiences, improve business visibility and responsiveness, engage and serve customers, and improve relationships and efficiency among value chain partners. More importantly than ever, portals appeal to end users overwrought with too many systems to log into and too much information. Enterprise portals unify the user experience, and provide relevancy and context across disparate applications. They provide a unified user experience by spanning across on-premises and cloud boundaries, as well as business and social boundaries. IT organizations need them more than ever to pull together and aggregate disparate information, exert control and ensure compliance, and scale their ability to agilely deliver these applications to the business and users.

Looking forward, the horizontal portal market will serve as an important foundation for the emerging user experience platform (UXP). Organizations are focusing on business-level issues, requiring better engagement of users across a widening range of devices and channels, and new vendors are entering the market with alternative approaches to accomplishing the portal proposition. As portals, user interfaces, and user interaction technologies and practices have proliferated, they have evolved into disconnected stovepipes. Portal products, mashup tools, rich Internet application (RIA) tools, Ajax solutions, Web content management and mobile application development tools all target their respective platforms effectively, but they require enterprise developers to create separate user interaction models and code bases — with few, if any, cross-platform capabilities. Vendors have started to address enterprise concerns with the convergence of these related technologies. The UXP provides integration of technologies used to deliver portals, mashups, RIAs, Ajax-enabled websites, Web content management and mobile applications. This integration can take the form of a set of

Strategic Planning Assumption(s)

By 2015, widgets will surpass portlets as the most prevalent portal component model.

By 2015, Gartner expects at least 25% of new enterprise portal projects in Global 2000 firms to use open-source horizontal portal frameworks.

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.

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

separate, yet integrated, products (that may or may not be delivered as a suite) or a single product. Early examples of the UXP are largely derived from portal technology, and include Microsoft SharePoint, Oracle WebCenter along with Universal Content Management (UCM), and IBM's broadening WebSphere Portal with its related collaboration and content management portfolio, which is developing toward a more cohesive user experience platform.

The importance of portals and the future of UXP are not lost on vendors; enterprise vendors are using portals to promote their most-sweeping and most-critical agendas. Many of the vendors are using the portal to promote a far broader and deeper agenda, whether it's their developer platforms and tools, content management capabilities, databases and middleware, or enterprise applications. As an inherently cloud-friendly aspect of middleware, portals are also a fundamental vehicle for transitioning customers to the cloud. The portal choice is, therefore, critical to ensure that organizations can accomplish their business goals, while ensuring vendor independence and agility.

Organizations tend to make portal decisions based on a wide range of factors, including functionality, familiarity, price, interoperability, usability, momentum among customers and the IT ecosystem at large. As portals have evolved, basic portal functions, such as user management, personalization, content management and integration, have been extended and enhanced, and new capabilities, such as social computing, analytics and business process management, have been added to respond to subsequent customer demands.

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Magic Quadrant

Figure 1. Magic Quadrant for Horizontal Portals
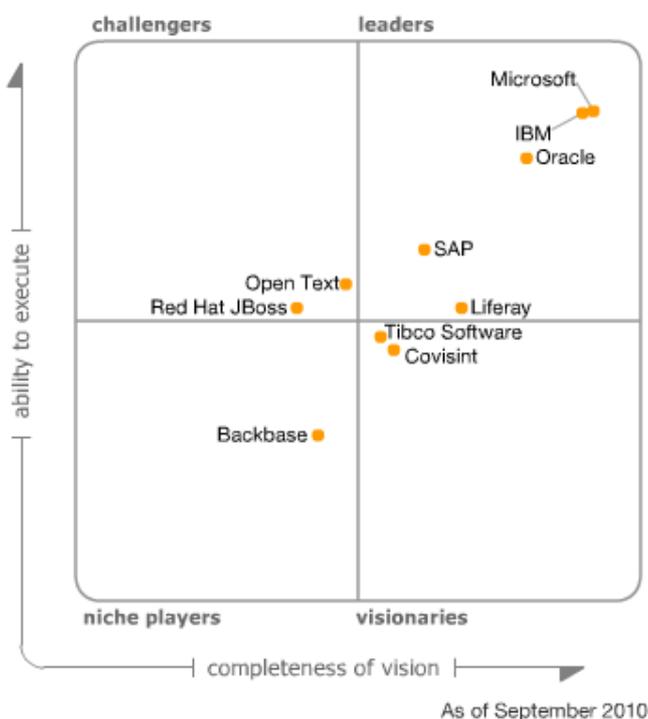
Source: Gartner (September 2010)

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Market Overview

Five vendors dominated portal selections during the latter part of 2009 and into 2010: Microsoft, IBM, Oracle, SAP and Liferay. Microsoft SharePoint is a consideration in more Gartner portal inquiries — over 70% — than any other vendor. Open-source Liferay has made the strongest

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 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.

move toward the forefront of portal decisions for Gartner's customers. IBM has retained its position as a strategic provider of portals for enterprises with complex and widespread needs. Oracle's acquisitions have brought it an enormous portal installed base and, accordingly, enormous attention on the direction of its various portal products.

Open source for portals is hitting its stride. During this prolonged period of economic uncertainty, many companies first looked at open-source products from Liferay, Red Hat JBoss and others as a pure cost consideration. However, these products are also winning deals as they prove themselves at larger organizations. They're relatively easy to acquire, test and implement; their open architectures strike a chord for interoperability and vendor independence; and they provide basic portal functions without the bulk of the megavendors' offerings. Products that come with enterprise content management (ECM), collaboration or social platforms can more easily conflict with other installed products.

Despite consolidation, 2010's portal market has seen encroachment from vendors in adjacent spaces, as well as from new vendors. For example, as many portal selections shift toward business-to-consumer (B2C) initiatives, companies often find themselves deciding between portal platforms and content management systems. Microsoft, IBM and Oracle offer portal and content management capabilities at various levels of integration. Other portal providers are gradually developing more-advanced content management features, and many content management vendors, including Autonomy, FatWire Software and Ektron, are offering portallike capabilities to suit some portal scenarios. Organizations are also addressing some portal needs with mashup platforms, social software and RIAs. Vendors like Adobe (especially with its recent acquisition of Day Software), Autonomy, Cisco and Google warrant a close look as they build beyond traditional portal software toward more-comprehensive UXPs.

Gartner has seen an increasing interest in portals "in the cloud," but relatively slow advancement among horizontal portal providers. As we've mentioned in prior research, portal frameworks will embrace the cloud in one of five forms: cloud-friendly portals, a cloud-based portal as a service, public-cloud deployable, private-cloud internal use and private-cloud external use.

All the portal products covered in this Magic Quadrant are inherently "cloud friendly," and most are able to produce and consume Web services via an array of mechanisms, including portlets, widgets and representational state transfer (REST)ful approaches. Portal vendors have made slower progress, however, in offering the remaining four scenarios. Covisint is the early innovator in the cloud-portal space among enterprises, offering a horizontal portal platform with all the benefits of mulitenancy and elasticity. Microsoft is alone among the megavendors, offering a cloud-based portal as a service in SharePoint Online and its broader Business Productivity Online Suite (BPOS). As for IBM, WebSphere Portal Server and Lotus Web Content Management Standard Edition are available on the Amazon Elastic Compute Cloud (EC2) Web services, but are not multitenant offerings. Oracle's WebCenter offering is also available, running on top of Amazon EC2 and using the infrastructure-as-a-service model, but it's not a multitenant offering.

At this stage, portals with a vertical appeal are gaining significant traction in the cloud. Covisint was founded as a trading exchange focused on the automotive industry, but has gained horizontal expertise in the course of supporting customers in other verticals, including manufacturing, healthcare, financial services and public-sector organizations. CampusEAI offers portals and Web content management as a service to higher education organizations, including general-purpose campus portals, alumni portals and prospective student portals.

Several vendors may also enter the portal market via cloud applications. Google Apps Premier Edition continues to attract potential portal customers with its cloud proposition, its Sites capability, its iGoogle consumer offering and its Gadget framework. However, Google's offering remains fragmented, and lacks the granularity of security, personalization and depth of integration to qualify as a true enterprise portal framework.

This Magic Quadrant for Horizontal Portals evaluates 10 vendors, two fewer than 2009. Since last year's Magic Quadrant, Sun Microsystems has been assimilated into Oracle, and Fujitsu no longer markets and sells a portal product. BroadVision's portal product has fallen below the

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.

requisite revenue requirements for inclusion. Backbase is the sole new entrant qualifying for this year's horizontal portals Magic Quadrant.

Market Definition/Description

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

- Employees — business-to-employee (B2E)

- Customers — B2C

- Business partners — B2B

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

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

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

Inclusion and Exclusion Criteria

To be considered for this Magic Quadrant, vendors must meet six minimum criteria:

- The vendor must have the ability to provide technology supporting deployment in a variety of scenarios, including employee, partner and customer-/constituent-facing portals.

- The vendor must provide portal functionality that meets all Generation 1, 2, and 3 criteria, as defined in previously published Gartner materials.

- 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, EMEA, Japan and the Asia/Pacific region.

- The vendor must support clients in more than one vertical industry.

- The vendor must have achieved at least $4 million in annual, portal-related product and service revenue during the 2009 calendar year.

- At least five distinct enterprises must have raised the vendor's name within the context of a horizontal portal discussion with Gartner analysts during 2009.

Added

Backbase has met the criteria for this Magic Quadrant, thus has been added.

Dropped

Since last year's Magic Quadrant for Horizontal Portals, Sun Microsystems has been assimilated into Oracle, thus Sun's portal offering is no longer considered separately. Fujitsu has also been excluded from this Magic Quadrant because it no longer markets and sells a portal product. BroadVision's portal revenue has fallen below the revenue requirements for inclusion.

Evaluation Criteria

Ability to Execute

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

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

- **Overall Viability (Business Unit, Financial, Strategy, Organization):** Overall viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood of the individual business unit to continue to invest in the product. Gartner also considers the vendors' likelihood of advancing the portal state of the art within the organization's portfolio of products. Assessments of the organization's cash and equity position, management, and financial strategy are weighed.

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

- **Market Responsiveness and Track Record:** This is the vendor's ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion considers the provider's history of responsiveness or its track record in the portal space. It also weighs the range and level of success among large enterprise customers using the portal offering.

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

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

- **Operations**: This is the ability of the vendor to meet its goals and commitments. Factors include the quality of the product management team, service and support organization, developer organization skill sets and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis (see Table 1).

Table 1. Ability to Execute Evaluation Criteria

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

Source: Gartner (September 2010)

Completeness of Vision

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

- **Market Understanding:** This criterion addresses the ability of the technology provider to understand buyers' needs and translate these needs into products and services. Vendors that show the highest degree of vision listen and respond to buyers' current demands while also responding to emerging needs. This criterion includes the vendors' vision for portal technology and for incorporating Gartner's Generation 6 and 7 functionality.

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

- **Sales Strategy:** This is the strategy for selling products that uses the appropriate network of direct and indirect sales, marketing, service, and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base. In situations where the vendor offers more than one portal product — or a portal product in addition to products offering alternative approaches to building Web presences — avoiding channel conflict is important.

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

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

- **Vertical/Industry Strategy:** This is the technology provider's strategy to direct resources, skills and offerings to meet the

specific needs of individual market segments and vertical industries.

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

- **Geographic Strategy:** This is the technology provider's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries, as appropriate for that geography and market (see Table 2).

Table 2. Completeness of Vision Evaluation Criteria

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

Source: Gartner (September 2010)

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Leaders

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

Microsoft and IBM appear in a near tie on vision and ability to execute, but their portal strategies, products and customer deployments exhibit distinct characteristics. IBM WebSphere Portal has long experience as a technology foundation for complex portal scenarios — often combining transactional information and content — inside, outside and among enterprises. WebSphere has usually been implemented from the top down, with strong IT and business oversight. To solidify and extend its proposition for external-facing scenarios, IBM has been acquiring and integrating products like Coremetrics. Microsoft SharePoint, on the other hand, has often grown from the ground up, starting as a platform for internal collaboration and evolving into a corporate intranet before being treated as the enterprise portal standard. Much of SharePoint's portal experience, thus far, lies with B2E scenarios involving knowledge management and ad hoc collaboration, but SharePoint's sheer volume of customers (more than 17,000) means that even a minor percentage of those clients amounts to an enormous number of deployments in external situations. Conversely, IBM continues to push forward in the B2E space, offering more-consumable packages like WebSphere Portal Express, and leveraging an array of well-established and new Lotus technologies. While most new WebSphere Portal deployments are external-facing, IBM has experience and capability in B2E situations that is unmatched by nearly (considering Microsoft's explosive B2E growth) any other provider.

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Challengers

Challengers in this Magic Quadrant demonstrate significant ability to execute, but lack the degree of portal-specific vision demonstrated by market leaders. Red Hat JBoss and Open Text are challengers. Red Hat JBoss demonstrates execution across several industries. It also has significant market penetration in North America, Europe and Latin America, but hasn't yet demonstrated vision similar to that of the market Leaders. Open Text's global customer base and renewed development efforts will raise its potential for market leadership. However, Open Text's portal customers noted a lapse in support following the Vignette acquisition.

Visionaries

Tibco Software and Covisint are Visionaries in this year's Magic Quadrant. Tibco Software continues to innovate on portal interoperability and development, while offering modular components that can enhance its own portal, complement portals from other providers or suit some portal purposes on their own. As Covisint continues to extend its cloud-based portal capabilities across demanding industries, such as automotive, manufacturing and healthcare, it's gaining expertise as a horizontal portal that distinguishes itself in its ability to handle complex B2B relationships.

Niche Players

The Niche Players 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. Backbase enters this year's Magic Quadrant with revenue and growth, as well as an impressive customer list garnered from targeting failed portal efforts. However, Backbase has little market presence and must adopt a more aggressive strategy to gain widespread appeal.

Vendor Strengths and Cautions

Backbase

Backbase is the first portal-less portal vendor to enter the horizontal portal Magic Quadrant. Backbase focuses on Web-oriented architecture (WOA), RESTful modes of interaction and the widget model. Backbase started off as a vendor of RIA technologies, quickly evolving to become an enterprise mashup tool vendor. It has supplemented this technology with a set of portal services, including personalization, content, search and security, to provide a complete portal foundation. Sold as the Backbase Rich Portal, the product provides a lightweight framework for rapidly creating and deploying enterprise portals. Backbase has diverged from the traditional portal product path by not supporting JSR 168/286 or WSRP v.1/v.2. Instead, it focuses completely on widgets as the container model as well as the interoperability model.

Strengths

- The lightweight nature of Backbase Rich Portal and its focus on WOA allow organizations to assemble and deploy portals rapidly, compared with other portal providers.

- Despite its lightweight nature, Backbase has many signature customers, some with multimillion-user portals.

- The vendor supplements its core portal offerings with products supporting forms, collaboration and community functionality.

Cautions

- Backbase is a relatively small company with relatively little visibility.

- A lack of support for traditional portal standards will limit Backbase Rich Portal's applicability to some portal scenarios.

- While Backbase Rich Portal includes the essential elements of an enterprise portal as a unified, personalized point of access, it may not readily compete with leading portal products that include built-in collaboration and content management capabilities.

Covisint

Covisint, a Compuware company, offers portal services via its ExchangeLink Platform, combining federated identity management, data integration and portal services with a third-party application marketplace. As an early mover in portals as a service, Covisint has established itself in a handful of vertical markets, including automotive, healthcare and financial services. Besides the U.S., Covisint maintains data centers in Tokyo, Shanghai and Frankfurt, Germany. The company is experiencing rapid revenue growth as cloud computing moves toward mainstream IT audiences.

Strengths

- Covisint has been visionary in leveraging the cloud and expanding across verticals to develop a broad, horizontal appeal. Covisint's cloud-based model, in conjunction with open-source building blocks, allows it to deliver portal functionality quickly, at a predictable cost, and with short time to value.

- Capabilities like Covisint's Trusted Identity Broker for cloud-based federated identity management make the platform a capable choice for organizations with multiple, complex business relationships.

- Covisint has strong knowledge of and experience in the automotive supply chain and healthcare verticals, enabling it to provide significant functionality out of the box. AppCloud provides further opportunities for Covisint to extend the range of this functionality.

Cautions

- Key differentiators for Covisint — its delivery as a cloud service and its proven federated identity management — will be subject to more competition as other players, including some of its open-source suppliers like Liferay, enter the cloud and refine themselves to support B2B scenarios.

- Covisint offers limited support for Generation 6 and 7 portal capabilities (for example, the portal offering still lacks enterprise mashup capabilities).

- As a cloud service, the Covisint Collaboration Portal brings challenges for customers that require a high degree of customization and interoperability with diverse, on-premises software.

IBM

IBM is a large, global technology provider, with extensive presence in large and midsize enterprises. IBM also targets the small or midsize business (SMB) space with its Portal NOW program, which uses IBM's partner ecosystem to rapidly deploy portals to SMBs. IBM continues to be a leading portal product vendor, with an extensive presence across all regions and industry segments. It complements its primary product, WebSphere Portal Server, with a variety of related technologies, including Lotus Web Content Management, Lotus Connections, IBM Mashup Center and Tivoli Access Manager/Identity Manager. IBM's portal strategy is to provide a broad set of functionality, delivering a scalable, mission-critical framework on which to build a variety of enterprise portals. While providing private-cloud-enabling technologies, IBM does not directly provide a public-cloud-based alternative; rather, it partners with Amazon to deliver the WebSphere stack (including Portal) on top of Amazon EC2. WebSphere Portal is delivered in a variety of product stock-keeping units (SKUs), including WebSphere Portal Express, WebSphere Portal Enable and WebSphere Portal Extend. IBM also packages a variety of "accelerators" to deliver out-of-the-box solutions, and offers services to provide a broad range of scenario- and industry-specific solutions.

Strengths

- WebSphere Portal Server has a long history of successful deployments in many scenarios across a wide array of environments.

- WebSphere Portal Server has the largest list of complementary technologies of all the portal product vendors' products.

- WebSphere Portal Server has the broadest set of portal capabilities of all the portal product vendors' products. There is little that organizations can't do vis-a-vis portals with this product.

Cautions

- WebSphere Portal Server has a heavy software footprint. It requires the WebSphere Application Server as its platform, and when combined with a common set of complementary products, it embodies a substantial set of code that must be deployed, integrated and supported.

- Due to the complexity of its technologies and the purchase price of same, users report higher-than-average total cost of ownership to acquire, deploy and operate IBM WebSphere Portals.

- Despite continuing improvement in portal development tooling, and the availability of multiple accelerators, users report that enterprise portals built on WebSphere Portal Server tend to take longer than average to create and deploy.

Liferay

Liferay continues the trend established last year of gaining traction in a market that is otherwise mature and has been consolidating for years. Despite Liferay's small size, Liferay Portal is the subject of an enormous number of Gartner inquiries. This reflects both the product's positive attributes as well as customers' dissatisfaction with the more-established commercial products. Many of the latter are burdened with high costs, complexity and less-than-hoped-for business value. Liferay has expanded its geographic reach while maintaining a relatively small number of employees, and has added offices in Brazil, China, India, Hungary and

Malaysia to its existing U.S. and German presences. It has added to its network of system integration partners, although most customers are self-reliant and/or rely on the primary vendor support staff. Liferay continues with a dual-license model (community open source and commercial open source), but has recently changed the open-source offering from a permissive MIT license (meaning an organization can incorporate the technology without having to give back to a more-pure Lesser General Public License [LGPL]). The license change will allow Liferay to benefit from its customers' and partners' innovations. Cisco, Covisint, SunGard (Luminis 5) and CampusEAI are among the many third parties using the Liferay Portal framework.

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Strengths

- Liferay's lightweight, standards-oriented, Java-based portal offers rapid time to value, compared with most other portal products.

- Liferay moves quickly to incorporate modern features, such as social networking and support for interoperability, via emerging standards like OpenSocial and Content Management Interoperability Services (CMIS).

- Liferay's open-source license offers the potential for significant cost savings, and serves as an easy on-ramp to organizations that favor a traditional vendor relationship.

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Cautions

- Despite its burgeoning market presence, Liferay still employs fewer than 200 people, with limited enterprise experience and limited (albeit growing) geographical coverage.

- The vendor must compete in a mature market against large, well-established players, although, even so, the company is gaining solid traction in the market.

- Liferay is self-funded, which limits the company's ability to grow rapidly and respond to competitors. However, it also gives the vendor the independence to pursue its long-term vision of innovation, and provides the business with a stable foundation for organic growth.

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Microsoft

Microsoft SharePoint is the linchpin in Microsoft's strategy to retain and grow its position in the enterprise amid emerging competition and new demands for cloud-based software. Often acquired via Enterprise Licensing agreements or finding its way into enterprises via the nominally free Windows SharePoint Services (now called SharePoint Foundation), SharePoint has frequently been deployed in a bottom-up or distributed fashion, often outside of the scrutiny or guidance of strategic IT. This is changing as companies realize its potential and its risks. SharePoint encompasses a broad and expanding range of capabilities across portal, collaboration, content management, enterprise search, business process management and business intelligence disciplines. A steadily increasing number of Gartner clients are pursuing critical business and IT initiatives with SharePoint in mind. Microsoft's latest release, SharePoint 2010, promises numerous improvements that better equip it as an enterprise portal framework, and as an environment for creating and delivering composite applications.

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Strengths

- Unlike several of its primary competitors' offerings, Microsoft SharePoint is both comprehensive and built on a relatively consistent and unified architecture.

- With SharePoint, Microsoft has seeded the portal market for enormous growth. SharePoint finds its way into enterprises via a wide range of business and IT initiatives, not all of which are identified as portals. More importantly, SharePoint is often licensed without the usual scrutiny of portal strategists.

- Microsoft is the only large portal vendor with a bona fide multitenant, elastic cloud portal offering, and a compelling path — focusing on office productivity and collaboration — toward using it.

Cautions

- Although SharePoint 2010 is more "open" than previous versions, using SharePoint as a portal framework constitutes a long-term commitment to Microsoft's agenda. The openness occurs at many levels, including authentication and authorization, the Web parts model, business connectivity services, and universal browser support. Still, organizations employing SharePoint will be compelled to invest in the .NET platform and the skills needed to support it, and they will likely be locked in to Microsoft Office for the near future.

- SharePoint 2010 is better-equipped as a portal framework than MOSS 2007, but many customers are still embroiled in MOSS 2007 projects. For some customers, upgrades will add complexity and delay completion of portal initiatives.

- SharePoint tends to have grown in many organizations in a highly distributed fashion or outside of the scope of IT strategists. Organizations deploying SharePoint as an enterprise portal platform must, therefore, pay special attention to governance concerns.

Open Text

Open Text is the largest independent vendor focused on ECM. Until recently, however, the vendor seemed reluctant to enter the related portal market, often wanting to appear as a complement, rather than competition, to its powerful partners (Microsoft and SAP) and competitors (IBM and Oracle). In acquiring Web content management leader Vignette in 2009, the company also inherited portal technology. Although Open Text offers its portal as a stand-alone, it primarily markets and sells it as part of its ECM and Web Engagement Management Suites, which target intranet and customer-facing portals. In addition to Vignette Portal, the suite also includes Web Content Management (WCM), Vignette Portal, Social Media, Experience Optimization, and Rich Media and Video.

Strengths

- Open Text's portal capability is established in many large organizations in a customer-facing role. User demands in this realm have provided the company rare expertise in providing a rich, engaging and highly personalized user experience across online channels. Open Text's path, therefore, aligns well with the emerging UXP market.

- The vendor has forged fruitful relationships with industry heavyweights, such as Microsoft and SAP. Open Text could leverage these relationships, as well as its global presence, to extend its base.

- Open Text's acquisitions, as well as its motivation to distinguish

itself from the megavendors' portal offerings, have brought it deep and broad vertical expertise.

Cautions

- Portal customers have noted Open Text's lack of direction and responsiveness in the period following the Vignette acquisition announcement. While Open Text is now moving to capitalize on the portal opportunity, it will take considerable effort to regain customer confidence.

- Despite its long heritage and strong vision in the portal market, Open Text rarely appears on Gartner clients' portal selection lists relative to the portal leaders. Based on Gartner's interactions with customers, Open Text's Portal is also being considered for replacement more frequently than most other portal software.

- As a highly acquisitive company, Open Text encompasses numerous products and brands. Although Vignette's customer base and technology warrant the organization's full commitment, ECM is the company's main focus. While important, the portal product represents an acquisition of an acquisition, and may not get the attention it deserves.

Oracle

Oracle's portal product portfolio orbits around WebCenter Suite, with WebCenter Framework providing the technology foundation for WebCenter Spaces, Portal and Services. WebCenter is more than a portal platform. It encompasses social-computing capabilities and content management, and will serve as the front end for Oracle BPM Suite as well as a composite application platform. WebCenter will also be a front end for Oracle Fusion Applications, providing a UXP across Oracle E-Business Suite, PeopleSoft, Siebel and JD Edwards applications. Until recently, customers have been understandably confused by a six-portal product portfolio: two portals from the "old" Oracle (WebCenter and Oracle Portal), two portals from the BEA Systems acquisition (WebLogic Portal and AquaLogic), a portal from Sun Microsystems and a portal from PeopleSoft. In addition to the products that are still marketed and sold as portals, Gartner continues to field inquiries about portal-related offerings from Stellent and Siebel. As the products converge into a more cohesive platform, they're being marketed and sold as part of the WebCenter Suite.

Strengths

- Leveraging successful portal and related components from its acquisitions, WebCenter constitutes a strong vision for the UXP. Oracle is firmly established as both an infrastructure and application provider. It has extensive resources and a strong motivation to provide a go-to UXP.

- Oracle's Portal technology, especially Oracle WebCenter Interaction and Oracle WebLogic Portal, is well-established and successful in many large enterprises. The vendor has a tremendous opportunity to guide these customers toward the broader WebCenter UXP vision.

- Oracle's portal direction, embodied in Oracle WebCenter, shares its foundation with Oracle's leading business applications (including PeopleSoft, Siebel and Oracle E-Business Suite), and will serve as a unifying interface for its broader Oracle Fusion Middleware vision.

Cautions

- Despite Oracle's efforts to rationalize its acquisitions, customers still perceive between five and eight different approaches to addressing portal needs. A good deal of Oracle's development and marketing effort has, therefore, gone toward integrating and clarifying a crowded product road map.

- Gartner customer inquiries indicate that Oracle has lost portal market traction as a result of customer confusion, distractions from the acquisitions and a high perceived cost.

- Oracle's ecosystem of system integrators and other partners is in flux, largely due to the vendor's acquisitions and encroachment in many spaces. Customers must ensure that their implementation partners have requisite expertise in the chosen technologies.

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Red Hat JBoss

Red Hat's JBoss Enterprise Portal Platform (EPP) is the commercial version of the open-source GateIn community portal. GateIn is the result of a partnership between Red Hat and eXo, and it addresses previous content and collaboration feature gaps in Red Hat's portal platform. The continued improvement of proprietary portals from IBM, Microsoft and others, combined with the emergence of Liferay as a compelling open-source alternative, made the partnership necessary.

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Strengths

- JBoss EPP is a reliable portal platform for innovative and technically savvy IT departments desiring a simply architected, standards-compliant and extensible product.

- Red Hat's partnership with eXo makes a broader range of content and collaboration-related capabilities accessible to JBoss EPP customers. EPP's new plug-in architecture offers hope for a broader ecosystem of partners and developers around the portal.

- Customers report that Red Hat provides excellent, attentive support to JBoss EPP customers.

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Cautions

- Despite this new partnership footing with eXo, JBoss EPP suffers from many small shortcomings, such as dependence on the embedded JBoss application server, lack of search federation support via the packaged open-source search engine, limited support for mobile and context-aware scenarios, and lackluster browser support (Chrome and Safari are not currently recommended).

- JBoss EPP offers limited integration support, foregoing data model integration, message bus and message transformation, composition, and adapters. The limited selection of portlets available in the JBoss PortletSwap catalog offers little enhancement in this area, although Red Hat is making moves to correct this issue.

- JBoss partners with other companies, like eXo, to address gaps in its portal. This allows JBoss to improve the range of capabilities available in what is now called GateIn, but increases execution and integration challenges beyond those of fully integrated competitors.

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SAP

SAP is trying to reassert its position in the horizontal portal market. Forthcoming developments in SAP NetWeaver Portal focus on performance and scalability, interoperability, and business user empowerment. While SAP NetWeaver Portal has been used mostly as a Web enabler and delivery mechanism for SAP business applications, SAP continues the push toward making it a business workplace in itself. New components like Web Page Composer will allow end users to manage their own websites and assemble their own applications. The new Enterprise Workspaces will allow organizations to deploy personal and team-oriented sites that will enable users to pull in SAP and non-SAP information into a collaborative, flexible environment. During the eight years since SAP's introduction of NetWeaver, SAP NetWeaver Portal has strived to help manage the more-collaborative, ad hoc and unstructured work beyond SAP business applications.

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Strengths

- SAP NetWeaver Portal has a firm foothold among business and IT influencers, which makes it compelling as a portal provider. SAP NetWeaver Portal is compelling for customers that rely on SAP applications for ERP, supplier relationship management (SRM), business intelligence, CRM, product life cycle management (PLM) and human capital management (HCM), among other applications.

- SAP is responding to many customer demands. Developments in v.7.3 around flexibility and usability for workgroups and business users, along with improved scalability and interoperability, are geared toward providing relief for companies looking to extend NetWeaver Portal's usefulness. In the meantime, SAP is taking broader steps to improve the user experience across its broad portfolio of applications and services.

- A number of positive developments are on the way. The emerging "Project Gateway," designed to provide standards-based access to SAP data, offers promise as a more open and agile means of providing interoperability with other portal and user interaction assets. In addition, SAP's Sybase acquisition will give SAP an angle toward addressing pressing mobility needs.

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Cautions

- NetWeaver Portal's role has become obscured amid a growing array of user interaction technologies and approaches, including SAP GUI, the NetWeaver Business Client, Duet Enterprise for Microsoft SharePoint and SAP, and enterprise collaboration efforts like StreamWork.

- Customers without a substantial investment in SAP as an enterprise application provider should look elsewhere for portal and user experience capabilities. Many SAP customers limit SAP NetWeaver Portal's role relative to more-open, flexible and user-friendly portal frameworks with a better track record for general-purpose knowledge management, collaboration and customer experience.

- Many Gartner customers have already limited use of SAP NetWeaver Portal to an application-centric role. Others are employing it as a conduit to expose SAP applications and processes to other portal products.

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Tibco Software

Tibco Software's overall expertise in Services Oriented Architecture

(SOA), Business Process Management (BPM) and integration lends it a useful position in serving enterprise portal needs. The vendor offers a wide range of modular products and services to support traditional portals and portal-less portals. Tibco PortalBuilder 5.3 is the flagship portal product, while Tibco PageBus provides a simple framework for invoking Web services and gadgets, and composing mashups. The vendor's overarching strategy, known as the Active User Experience (AUX), also includes Tibco General Interface (to rapidly build rich portlets), Spotfire data analysis and the newly available Tibco Formvine, which allows business users to build their own Web applications and gadgets. Tibco Software is incrementally introducing portal services, such as OpenSocial gadgets, as part of its Tibco Silver cloud initiative.

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Strengths

- Tibco Software is particularly strong at portal initiatives involving complex business to business relationships and processes, and information such as master data management (MDM) and customer information management (CIM) that must be shared securely among organizations.

- The vendor's AUX product direction and modular approach anticipate customer demand in line with Generation 7 portals and the broader concepts of the UXP. The portfolio accounts well for increasing interoperability, mobility, and social demands.

- Customers rate Tibco Software highly for flexibility, extensibility, scalability and performance.

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Cautions

- The vendor has low visibility in the portal market, despite its long heritage. Gartner's customers rarely bring up Tibco Software proactively during portal discussions.

- While the vendor's modular approach will do well in light of broader architectural strategies and established technology from other providers, the array of products and the logic of their segmentation can appear confusing. Products like Tibco PortalBuilder, Tibco PageBus, Tibco Forms, Tibco Formvine and tibbr require definition as part of an overall value proposition.

- Tibco Software's portal customers regard the product as a base platform, rather than a portal product readily suited for any specific scenario. Customers report difficulty when migrating and/or upgrading from one Tibco platform to the next.

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