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Magic Quadrant for Horizontal Portals

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VIEW SUMMARY

Consumerization, social, mobile and cloud trends, as well as technical advances, are rapidly changing the face of the portal market. This year's Magic Quadrant includes new vendors with new solutions to portal issues.

What You Need to Know

After years of steady consolidation in the portal market, the field of potential providers is once again widening. The evolution toward a broader and more comprehensive user experience platform (UXP), the continuing development of portal cloud services and the increasing validation of the client-centric widget model are opening up new avenues for organizations looking to supply new portal solutions to IT organizations, business constituencies and end users.

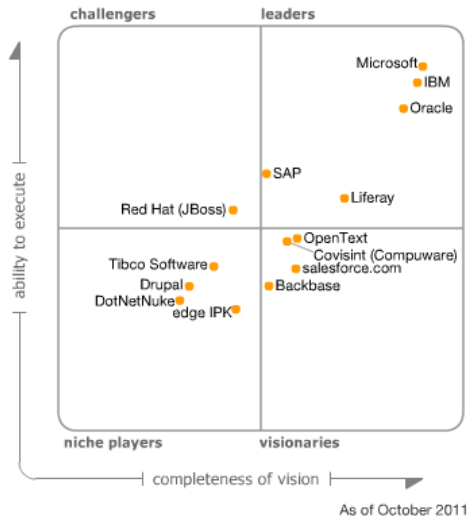
Portals are personalized points of access to relevant information, business processes and people that bring value to three major audiences:

- Portals provide end-users with a single, personalized point of access to relevant and authoritative information.
- Portals provide business organizations with a unified place to engage, support, learn from and respond to their customers and other audiences.
- Portals provide IT organizations with an agile, scalable means to deliver Web applications, an environment to enable collaboration and a means to delegate responsibility to the business.

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Magic Quadrant

Figure 1. Magic Quadrant for Horizontal Portals



Source: Gartner (October 2011)

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Market Overview

Portal Customers and Vendors Focus on the User Experience

Gartner client discussions point to significantly altered portal emphases in recent years. Whereas portal initiatives often involve aggregating and delivering information sources and extending business applications and processes, new portal customers recognize that they must engage end users to ensure the success of their portal efforts. Organizations are finding that older portals do not (or never did) garner significant adoption and loyalty from end users, which has led to significant portal failure and stagnancy.

STRATEGIC PLANNING ASSUMPTIONS

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

By 2015, Gartner expects that at least 25% of new enterprise portal projects in Global 2000 firms will 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 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.

knowledge management tend to split off into numerous silos. This trend raises risks for the enterprise, creating new and more widespread privacy and compliance concerns, as well as new levels of knowledge and information management chaos. Rather than using portal technology only to gather value for themselves, enterprise IT and business organizations must ensure valuable and engaging experiences for their end users, whether they're employees, partners, customers or citizens.

As for the portal vendors, Google and Facebook have shown enterprise portal vendors the power and earnings potential that people-centricity and viral adoption can bring. Microsoft SharePoint's sweeping growth in the portal market is largely a factor of its appeal to business users, rather than the portal's IT owners. Until recently, most portal providers appealed to enterprise IT leaders first, often emphasizing the security and compliance counterpoints to this new, flexible, yet seemingly risky, user-centricity.

Clearly, IT organizations, their business leaders and their end users need platforms that offer value and provide a balance of control and flexibility. Portal vendors are quickly realizing that they must enable flexibility and manageability by business users. They must offer social experiences and mechanisms that enhance usability and ensure end-user adoption of their products. Meanwhile, enterprise portal vendors must bring the appropriate level of user appeal into a productive, reliable, extensible and secure portal environment.

The user experience trend also means that portal providers must rely less on consultants, system integrators (SIs) and designers to ensure an engaging and productive user experience. That is, they must provide a shorter path to a fruitful user experience out of the box.

"Portlets-R-Us": The Portlet Catalog Becomes the App Store

Portal customers and vendors seeking to respond more readily to business needs are also revisiting and relabeling fundamental portal concepts. To accommodate more business needs, respond to consumerization, delegate capability to the business, improve extensibility and interoperability with third-party providers, and cultivate developer and vendor ecosystems, many portal providers are building or reviving their portlet catalog capabilities. Some vendors are starting to refer to them as "App Stores." Now that consumers and developers alike have grasped the concept (largely through their smartphone and tablet experiences), the market seems ripe for the concept.

Portlet catalogs typically offer portal components, modules, skins, themes, templates and connectors that customers can easily plug into their portal frameworks to improve usability and design, or to offer industry- or application-specific capability. The portlet store concept is applicable to internal scenarios, where organizations want to provision certain capabilities that can be readily and safely invoked by their business users and departmental developers, as well as to external communities, which use the portlet marketplaces to share and sell their components to other organizations. Internal portal app stores can be used to enable IT organizations to deploy useful, compliant and secure portal components that site administrators and end users can then plug into their personal or group sites.

Vendors including IBM, Microsoft, Oracle, Liferay, Backbase, DotNetNuke and Drupal support the portlet store concept, and many are relabeling their efforts to align with consumer app store trends. Vendors are also supporting consumer-Web widget standards, including OpenSocial, to leverage widely available components, such as Google Gadgets.

The Portal Market Split: UXPs and Lean Portals

The horizontal portal market will serve as a foundation for emerging UXPs (see "The Emerging User Experience Platform"), which provide the integration of technologies used to deliver portals, mashups, rich Internet applications (RIAs), Ajax-enabled websites, Web content management (WCM) and mobile applications. This integration can take the form of a set of separate, yet integrated, products that can be delivered as a suite or as a single product. Early examples of UXPs are largely derived from traditional portal technology, and include Microsoft SharePoint, Oracle WebCenter and IBM's broadening WebSphere Portal, with its related collaboration and content management portfolio, which is evolving toward a more cohesive UXP.

Although a dozen years of evolution and consolidation in the portal market have brought us sophisticated and versatile products, they've also brought functional bloat and technical complexity. Many organizations want lean portals: simple, more cost-effective products that focus on the portal's primary proposition and provide a personalized point of access to relevant information, business processes and people. Lean portals rely on modern architectures and representational state transfer (REST)-oriented standards for interoperability, often bringing customers faster time to value, without violating software standards in adjacent spaces, such as content management and analytics. The tendency toward lean portals accompanies a desire for lower costs, so it's a space in which open-source providers are playing a more prominent role.

The portal market's bifurcation is opening opportunities for software and service providers on both sides of the rift. Backbase and edge IPK, which is new to this year's Magic Quadrant, qualify as lean-portal providers. Although Liferay is beginning to broaden and deepen its portal capability with a view toward UXP, most customers acquire it for its lean-portal qualities. Open-source products such as DotNetNuke and Drupal are also entering the market with a lean proposition. Salesforce.com enters this Magic Quadrant combining a lean proposition with a software as a service (SaaS) model, which is aimed at lowering costs, easing accessibility

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

Completeness of Vision

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

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

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

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

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

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

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

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

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and ensuring adoption.

On the UXP side, although they didn't meet the criteria for this year's portal Magic Quadrant, vendors such as Adobe and Cisco loom large as potential players in the emerging UXP market, entering via content management in Adobe's case and collaboration in Cisco's.

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MARKET DEFINITION/DESCRIPTION

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

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

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

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

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Inclusion And Exclusion Criteria

To be considered for the 2011 Magic Quadrant for Horizontal Portals, vendors must meet a combination of criteria. They need to provide technology supporting deployment in a variety of scenarios, including employee, customer/constituent-facing and partner portals.

The vendor must provide the following capabilities:

- A container or framework and component model (i.e., "portlets" or a similar component model)
- Security administration, including the ability to manage security rights and privileges by individual, group or role, such as single sign-on
- The ability to integrate with a wide range of data sources, applications, content, and services via various mechanisms, such as enterprise service bus, REST, Really Simple Syndication, Web services, iFrames and screen-scraping
- Personalization, including the ability to direct relevant content and information to individuals, groups and roles; change the content and behavior of page components, pages or page groups; and provide end-user customization (personalization may be driven by any number of static user-centric attributes, dynamic session-centric attributes, collaborative filtering or social relationships)
- Content management, including the ability to create, organize and publish content in the context of the portal, as well as search and content aggregation
- Business process management (BPM), including some means of providing or integrating with workflow and BPM tools or platforms
- Support for multichannel and multidevice delivery and presentation

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

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

The vendor must have achieved one of the following:

- At least \$4 million in annual portal-related product and service revenue as of 2010
- An installed base of at least 100 enterprise customers

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ADDED

DotNetNuke, Drupal, edge IPK and salesforce.com met the criteria for this year's Magic Quadrant for Horizontal Portals and have been added to this assessment.

(Note: Tibco Software did not respond to requests for supplemental information or to review the draft contents of this document. Therefore, Gartner's analysis is based on other credible sources, including public information, Tibco's website, more than five discussions with PortalBuilder customers, our day-to-day interaction with Tibco users and information provided

to us for the 2010 edition of this research.)

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DROPPED

No vendors were dropped from this year's Magic Quadrant for Horizontal Portals.

(Note: To support this research, Gartner collected information from vendors on their offerings, organizations and strategies through an extensive request for information, as well as supplementary briefings. We also surveyed and interviewed portal customers, some of which were provided by the vendors and some of which we located on our own. We also used information and experience gathered in our numerous client inquiries and other customer interactions.)

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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 that the individual business unit will continue to invest in the product. Gartner also considers the vendors' likelihood of advancing the state of the art for portals in the organization's product portfolio. Assessments of the organization's cash and equity position, management, and financial strategy are weighed.

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

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

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

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

Operations: This is the ability of the vendor to meet its goals and commitments. Factors include the quality of the product management team, service and support organization, developer organization skill sets and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis (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 (October 2011)

COMPLETENESS OF VISION

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

Market Understanding: This criterion addresses the ability of the technology provider to understand buyers' needs and translate these needs into products and services. Vendors that show the highest degree of vision listen and respond to buyers' current demands, while responding to emerging needs. This criterion includes the vendors' vision for portal technology and for incorporating Gartner's Generation 6 and Generation 7 functionality (see "Generation 7 Portals: Unifying the User Experience").

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 in which 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 involve architecture, interoperability and integration, composite applications, RIAs (Ajax, etc.), cloud computing, social software, context awareness and analytics.

Geographic Strategy: This is the technology provider's strategy to direct resources, skills and offerings to meet the specific needs of locations outside the "home" or native geography, either directly or through partners, channels and subsidiaries, as appropriate for that region and market (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 (October 2011)

Leaders

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

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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) is a Challenger.

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Visionaries

Visionaries in this year's Magic Quadrant demonstrate a firm grasp of emerging customer needs and the potential impact of new technology. Covisint (Compuware) and salesforce.com are ahead of much of the market in providing cloud portal services. Backbase has focused effectively on providing a lean portal, while employing new mechanisms for interoperability and meeting the demand for better user experiences. OpenText moved from Challenger to Visionary between 2010 and 2011. Although OpenText demonstrates an astute understanding and a plan to pull together its many assets to address the UXP, it has lost some customer momentum during the past year.

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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. DotNetNuke and Drupal enter the 2011 portal Magic Quadrant as open-source providers that typically start with a content management proposition; however, both have fundamental portal capabilities. Both have expansive user bases, but their portal use among large enterprises is only just emerging. Edge IPK is a small provider with a horizontally capable lean-portal platform. However, its customer base is small and regionally limited, compared with the other providers.

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Vendor Strengths and Cautions

BACKBASE

With main offices in New York and Amsterdam, Backbase is a software vendor focused on the portal and user experience markets. Backbase began business in 2003, offering a JavaScript toolkit, then extended its client-side technology to a lean portal. The Backbase Portal Suite, currently in Version 5.0, includes a core portal client, a core portal server that handles persistence, Web services integration, personalization and publishing, and a broadening set of services and extensions to address content management, BPM and social software. Backbase's customers are largely in the financial services sector, and the suite is often applied to customer-facing portals and customer self-service scenarios.

Strengths

- An end-user-oriented focus supports business user creation and management of portal

- page flows and content. Backbase's user interfaces (UIs) are simple, logical and attractive, allowing business users and citizen developers to drag and drop preconfigured widgets onto pages. Backbase is employing an app store concept as an extension of an older "portlet catalog" idea. By supporting the World Wide Web Consortium widget and OpenSocial standards, the app store taps into a larger ecosystem of third-party widgets and plugins that work well with the Backbase environment.
- Despite its small size, Backbase can point to premier customers in the financial services sector and impressive implementation partners. Healthy revenue growth and the number of licenses as a percentage of overall revenue reassure viability. Backbase's aggressive expansion from its Euro-centric origins should make it capable of serving organizations in other regions.
- Backbase has made a strong business out of reclaiming failed or stagnant portal initiatives founded on other Java-oriented vendors' technologies. Customers report rapid deployment and development, compared with traditional portal providers.

Cautions

- Backbase's stated strategy is to target financial services on the assumption that, because it's hungry for innovative and engaging customer experiences, and must account for intense compliance concerns, it will gain the expertise and credibility it needs to serve other markets. Although Backbase has shown some customer appeal for government, telecom and high tech, customers in other industries may not find ready answers to their equally pressing, but unique problems.
- Although Backbase Portal Suite has broadened its functional footprint to support content management, social scenarios and BPM, customers with e-commerce needs may need to look elsewhere.
- Like any small company in a market dominated by large vendors, Backbase will be challenged to determine how and where to expand, functionally and on a go-to-market basis. Although the ecosystem shows promise in attracting influential SIs, it remains to be seen how Backbase can garner a critical mass of contributors to its app store with a relatively small set of customers residing mainly in a single industry.

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COVISINT (COMPUWARE)

Covisint, a Compuware company, is well-established as a cloud portal services vendor offering integration, federated identity management and horizontal portal capabilities through its ExchangeLink SaaS offerings. The company's core offering is a cloud-based enterprise portal platform built on the open-source Liferay portal. Covisint initially targeted the B2B automotive industry and has since evolved into a horizontal offering addressing the healthcare, manufacturing, energy, government, life sciences, insurance, travel and financial services verticals. Covisint has broadened its scope to include AppCloud and mobility offerings. As a true cloud portal service, Covisint exhibits the time-to-value characteristics of a lean-portal offering, while supporting complex external relationships and transactions among value chain partners.

Strengths

- Covisint's ExchangeLink has the distinction of being the first cross-industry, horizontal portal platform in the cloud. Covisint deployments are generally production-ready in a shorter time frame than those of competing packaged portal products, thanks to the cloud portal services model and its proven expertise in various vertical markets.
- Covisint's 12-year heritage in serving enterprise-class needs has strengthened its capabilities, including identity management and data interchange. This makes it uniquely well-equipped for portals involving complex interenterprise relationships.
- With a rapidly expanding, cross-industry customer base, Covisint can no longer be characterized as a vertical portal provider. Covisint shows strong penetration of many vertical markets, along with an expanding ecosystem of third-parties delivering value through the Covisint AppCloud app store.

Cautions

- Despite its long heritage and its innovation in the cloud, Covisint lacks the visibility it deserves among potential portal customers. Gartner clients rarely ask about Covisint, even when it's uniquely well-suited to their portal requirements.
- As it expands across vertical markets, companies should validate Covisint's expertise, especially through customer references, in their own vertical industries and value chains.
- Because Covisint is a cloud offering, ExchangeLink is not suitable for organizations that prefer packaged products for deployment in private data centers.

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DOTNETNUKE

Originally positioned as a portal application framework, DotNetNuke is now a WCM platform consisting of a core framework and a set of services, complemented by modules created by DotNetNuke, third-party providers and the open-source community. DotNetNuke was introduced in 2002 as one of the first open-source applications native to the Microsoft

platform. Developed as an ASP.NET application using a VB.NET code base, it has recently been completely rewritten in C#. The package has enjoyed steady growth since its inception, with DotNetNuke powering more than 700,000 websites worldwide. DotNetNuke was formed as steward of the DotNetNuke open-source project in 2006 and is focused on ensuring the integrity of the software platform, while providing two commercial product editions: DotNetNuke Professional Edition and DotNetNuke Enterprise Edition, which are used by more than 1,700 commercial organizations. DotNetNuke exhibits the characteristics of a lean portal.

Strengths

- DotNetNuke boasts an extensive user base, with several large enterprises beginning to use the platform as a portal standard enterprisewide.
- Many of the other vendors will struggle to put together an app store; however, DotNetNuke has already generated a vibrant ecosystem of modules through the open-source Extensions Forge and SnowCovered.com, valuable assets that DotNetNuke has recently acquired.
- DotNetNuke is exploiting the growing use of .NET as a development standard for all Web efforts. Although this effect is largely the result of SharePoint's impact, DotNetNuke is often regarded as a lower-cost, lightweight alternative or a complement to SharePoint, and .NET portal alternatives to SharePoint are scarce.

Cautions

- Customers report that third-party modules create significant complexity and inconsistency in quality, reliability and viability.
- Although DotNetNuke is beginning to attract the attention of larger customers for more-comprehensive initiatives, it's still used primarily for independent projects and/or as a complement to other portal software. It's not often used as a comprehensive architecture for portals across large organizations. Facilities to support bigger scenarios are just beginning to emerge in the product.
- DotNetNuke suffers from low visibility in the portal market, and, as a .NET-based solution, it's often overshadowed by the pervasive presence of SharePoint. Gartner customers are rarely aware of DotNetNuke's existence. Although the company has steadily gained the attention of potential WCM customers, the platform's portal capabilities are part of what differentiates it from the WCM competition. DotNetNuke will have to step up its marketing and enterprise sales efforts to ensure market visibility.

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DRUPAL

Drupal is a Hypertext Preprocessor (PHP)-based, open-source WCM platform that also offers portal capabilities. Drupal is the most widely deployed open-source portal/content management system package, powering more than a million websites for more than 400,000 organizations and 600,000 registered members, an ecosystem of module authors, theme designers and small consultancies. Version 1.0 of Drupal was released in 2001, and the software has gone through about a dozen major releases, culminating in Drupal 7, released January 2011. The initiative behind Version 8, which will include HTML5 support, is under way. As a noncommercial open-source (General Public License) project, Drupal has approximately 1,000 developers who are direct contributors to the core system, and thousands more in the extended ecosystem.

Drupal depends largely on independent Web development and system integration firms for enterprise service, support and implementation. Acquia, a venture-funded company that was founded in 2008, has emerged as a prominent Drupal business, selling enterprise support and cloud-hosting offerings. Acquia also operates Drupal Gardens, a SaaS version of Drupal. Drupal exhibits the characteristics of a lean portal.

Strengths

- Drupal boasts impressive customers across media and entertainment, government and healthcare organizations. Users include Whitehouse.gov, various sites at NYSE, Turner.com, NCAA.com, PGA.com, Time Warner.com and Al Jazeera for externally facing portals.
- Drupal offers lower initial costs than commercial platforms, and customers report higher-than-average value relative to cost and total cost of ownership (TCO) than competitive portal products.
- Drupal has proved the value of a lightweight framework for organizations requiring quick time to value. The PHP language offers flexibility and agility. Customers report easier and quicker implementation than most other portal providers.

Cautions

- Many of the more advanced portal interoperability features are lacking in the platform. As a PHP-based system, it lacks support for many traditional portal standards, including JSR 168/286 and Web Service for Remote Portlets (WSRP), which may hamper some customers' expectations regarding its use in multiportal environments. The interportlet communication required for more-sophisticated composite applications requires custom development.
- Drupal lacks the depth of many other portal offerings. Lacking message bus/message

- transformation, BPM or process integration, orchestration and a native analytics dashboard, Drupal may be better suited as a lightweight front end or community publishing system than a robust portal architecture intended for many scenarios.
- PHP is not as robust or dynamic as other languages, and it may be less maintainable than Ruby, Python or Scala. Customers report that Drupal's core code is overly complex. Although Drupal 7 adds many features targeted toward end users and nonprogrammer designers, some customers complain that the enhancements have added complexity for developers.

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EDGE IPK

Based in Europe, edge IPK emerged from the mashup and RIA spaces as a portal-less portal vendor, and is new to the horizontal portal Magic Quadrant this year. Its edgeConnect product is considered a lean-portal product emphasizing multichannel, multidevice presentation and delivery. Nonetheless, edge IPK is clearly headed toward the UXP arena, along with the other suite-oriented vendors. The edgeConnect product is aimed at leveraging HTML5 more comprehensively to provide support for a wide array of devices, including smartphones and tablets.

Strengths

- As a lean-portal product, edgeConnect has offered customers rapid time to deployment, compared with traditional portal offerings.
- Edge IPK has quickly established a brand presence among European accounts, especially in competitive markets, such as insurance and financial services. Customers report higher-than-average quality and effectiveness of edge IPK's professional services in addressing their needs.
- Early adoption of HTML5, in addition to leveraging SOA and WOA capabilities on the back end, shows promising vision for supporting many platforms and devices.

Cautions

- With a predominantly European customer base, edge IPK's North American base is just beginning to grow, and it has a scarce presence in APAC or emerging regions.
- As a lean portal, edgeConnect serves the fundamental role of providing a single, personalized point of access to relevant information, business processes and people. However, edge IPK lacks some of the functionality that customers have come to expect from their portal providers. Although edge IPK looks forward to emerging widget and HTML5 opportunities, support for some traditional portal standards, including WSRP, JSR286 and JSR170, is only just emerging. Support for the Content Management Interoperability Services (CMIS) specification is not expected until 2013.
- Relative to portal competitors, edge IPK is a small vendor. As it grows, it may struggle to gather the marketing and sales resources to expand and support its customer base, while attempting to innovate.

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IBM

IBM WebSphere Portal, currently in Version 7.0, is designed as a framework and a collection of services, often implemented as portlets, widgets or other components. Since its emergence in the late 1990s, IBM has been a leader in the portal market. Generally, IBM has continued to enhance the fundamental portal foundation, while providing a more cohesive portfolio of solutions to address the needs of various industries and business scenarios. Offerings such as PortalNow are geared toward providing organizations a quicker on-ramp to productive portals. IBM continues to amass a broad portfolio of offerings, including WCM, analytics, social software and e-commerce, that complement WebSphere Portal and put it on the UXP path.

Strengths

- The WebSphere portal remains a widely used platform for high-volume, complex, Java-based, global projects that require integration with multiple, heterogeneous information sources and applications.
- Combined with the breadth and depth of its portfolio, including such portal-adjacent capabilities as BPM, integration, social software and analytics, IBM's global reach will ensure its continuing success in the portal and emerging UXP markets.
- IBM is successfully using the expertise gained through its large portal efforts to create solutions that appeal to business leaders with industry- and scenario-specific needs.

Cautions

- Being a long-term leader in enterprise portals has its down side in a rapidly changing market. Some customers have come to regard IBM as too large, complex and costly to implement. IBM's primary proposition for IT organizations served it well in the early and ensuing years of the portal's evolution, and IBM's recent introduction of more business- and user-centric qualities is improving the situation, but the product has a way to go in this regard.
- Although IBM continues to simplify and improve overall usability, WebSphere remains primarily a high-end portal mostly attuned to the skills of sophisticated IT departments.

- Customers report that WebSphere requires advanced skills to configure properly, and the user experience depends largely on IT and design skills, rather than out-of-the-box characteristics.
- Although customers appreciate the power of a fully integrated WCM system in the WebSphere portal, they report uneven experiences with usability, performance and reliability — one reference called it "a marriage made in heaven"; another said that the challenge of usability left them "searching for alternative solutions." The varied experiences may be based on which release of the WCM capability each had implemented and which use case the WCM capability was intended to support. Customers should thoroughly evaluate WCM for their specific use cases and their end users' skills.

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LIFERAY

Liferay is an open-source company founded in Los Angeles in 2000 to provide enterprise portal capabilities to nonprofit organizations. Incorporated in 2004, it has since expanded its global presence with offices and subsidiaries throughout North America, Germany, China, Spain and India, as well as with partnerships in more than 30 countries worldwide. Liferay Portal 6.1, just introduced in the third quarter of 2011 includes new document management enhancements, and the company has introduced the Liferay Marketplace, a new app store for its growing community of customers, developers and partners. Liferay also offers Liferay Social Office, a social collaboration suite for enterprises. Liferay's customers often select it for its lean qualities, although the company is building out a more comprehensive UXP with content management capabilities and its Liferay Social Office product.

Strengths

- Liferay Portal has captured the strengths of the Java platform — security, maintainability and cross-platform capability — in a relatively lightweight package. Liferay's interoperability and its ability to work on various application servers enables it to readily exploit third-party Java assets to gain scalability and enterprise compatibility. Customers report that Liferay is easier to install and use and less expensive to acquire and maintain than many other Java-oriented portal products.
- Although Liferay employs only 250 people in a market dominated by some of the world's largest software companies, the product appears on Gartner clients' portal selection shortlists as often or more often than Oracle, IBM and SAP. Liferay is also gaining traction among large organizations as an enterprise portal framework that supports many portal efforts. It's not limited to single portal projects among smaller organizations anymore.
- Unlike most of its competitors, Liferay Portal has native support for multitenancy. Although Liferay doesn't offer its own cloud portal service, third-party offerings such as Covisint and CampusEAI (which both employ versions of Liferay) have demonstrated its strengths in the cloud. Liferay could put itself in a position to exploit burgeoning customer demand for cloud portal services.

Cautions

- Liferay's explosive growth has brought it quickly into the view of large enterprises. It's no longer being employed only for single projects or for experimental sites. It has effectively entered "the big leagues," competing with vendors with far larger marketing, sales, services and development resources. The company has lately shown some strain in supporting its growth. A few Gartner customers have complained about a lack of responsiveness from Liferay professional services.
- Liferay Portal installations tend to gain complexity over time, leaving many organizations wary about upgrading. Liferay's initial attraction toward innovative, creative developers has resulted in a great deal of custom development. Some customers Gartner has spoken with are on v.5.x and v.4.x versions of the platform and don't find the v.6.1 enhancements compelling enough to warrant migration. Customers implementing Liferay should avoid customizing the core code.
- As it extends toward UXP, Liferay could become as bulky as its competitors and compromise its lean-portal value proposition.

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MICROSOFT

SharePoint continues to be the fastest-growing area of Microsoft's software business, and, with the launch of Office 365 in early 2011, SharePoint Online becomes a key component of Microsoft's cloud strategy as well. SharePoint is popular with enterprises, in part, because of the nominally free SharePoint Foundation services frequently used for file sharing, basic collaboration, team rooms and departmental portals; the relatively smooth learning curve (in particular for non-IT staff); and the broad ecosystem of developers and partners delivering value-added services and customizations. SharePoint 2010 has achieved significant market success as a platform for collaboration and composite applications. SharePoint is emerging as a comprehensive UXP.

Strengths

- SharePoint is a comprehensive portal framework with a consistent and unified architecture built atop the proven .NET platform. SharePoint provides portal capability, a

- range of content management capability, search, collaboration, social capability and workflow capability in a single product. Although it may not reach best-of-breed capability in any of these functional areas, it benefits from combining them in a single product.
- SharePoint is easy for Windows users and .NET developers to get comfortable with, and most clients report rapid uptake of SharePoint consumption when it's deployed.
- As with other horizontal portal products, investments in customization unlock greater value from SharePoint. However, unlike other portal products, Gartner clients report that even a relatively plain installation of SharePoint delivers immediate business value, thanks to the large number of useful Web parts (Microsoft's portlet model) and integrations (for example with Microsoft Office).

Cautions

- Most SharePoint deployments are internal-facing and departmental-scale. In addition, SharePoint is often deployed as a near-turnkey application for collaboration, rather than the versatile and extensible middleware that some enterprise IT departments may be seeking. Hence, organizations committing to SharePoint as an enterprise portal platform require dedicated skills and a firm, long-term commitment to the Microsoft .NET stack. This includes a commitment to updating foundational platforms, such as SQL Server and Windows Server.
- SharePoint is so easy for end users to work with that unmanaged SharePoint installations are likely to sprawl quickly, necessitating remediation. More discipline is required of SharePoint governance activities than those of many of its competitors.
- SharePoint's functional breadth is unsurpassed among portal products; however, it often requires support from third-party products to bring it greater functional depth or usability, to fill its gaps, or to harden it for certain use cases. This applies even to workloads, such as WCM, social software and forms management, to which SharePoint lays claim. A reliance on a complex ecosystem could add complexity and cost for many customers.

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OPENTEXT

OpenText Portal 8.1.1 derives from the proven code stream of Vignette Portal and Epicentric, one of the pioneering portal products. Although OpenText has positioned itself to represent the portal as a suite of products for customers, social media, enterprise content and interoperability (with Microsoft SharePoint, SAP ERP and Oracle PeopleSoft/JD Edwards), it continues to be predominantly focused on enterprise content management (ECM). With the acquisition of weComm earlier in the year, OpenText has added the ability to deliver content and applications to the mobile and social media markets. OpenText will use its portal foundation, as well as its extensive portfolio of content management and collaboration products, to develop a UXP.

Strengths

- OpenText Portal is uniquely well-tuned to handle complex, cascading and multisite portal deployments. Organizations requiring delegated portal administration in support of global, multidivisional and multibrand portal sites should look at OpenText Portal.
- OpenText Portal extends the value of the company's ECM portfolio. Used in conjunction with OpenText ECM, OpenText delivers a content-centric portal experience that is personalized and targeted at many deployment scenarios (e.g., B2E, B2C or B2B).
- The acquisition of weComm has enabled OpenText to cohesively address the emerging mobility issues of its portal and content management customers.

Cautions

- Discussions with OpenText Portal customers reveal that the product's functionality and standards support have lagged behind the leaders in the portal market. Although OpenText's portal road map shows a thorough understanding of the evolving portal market and how to address it, catching up will require significant time and effort.
- OpenText is better known for its ECM and WCM products than its portal. OpenText Portal leans on capabilities from other products, including integration, mobility and social collaboration, to distinguish itself from competitive portal products. OpenText will need to rationalize its portfolio to demonstrate adequate commitment to the portal market.
- OpenText Portal's recent customer traction tends to lie outside North America and Europe, in emerging markets, such as South America and South Africa. OpenText Portal will need to regain customer traction in more-lucrative, competitive markets to reach leadership status.

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ORACLE

Oracle recently rebranded its Enterprise 2.0 strategy, under which its portal portfolio operated, as WebCenter, labeling it the "user engagement platform for social business." Oracle's new WebCenter brand has four major pillars:

- **Sites** — for Web experience management (powered by Oracle's FatWire acquisition)
- **Portal** — for composite applications, mashups and portals (powered by WebCenter Portal and Oracle's other portal technologies)

- **Content** — for ECM (powered by its Universal Content Management [formerly Stellent] technology)
- **Social** — for social networking and collaboration (powered by components from Beehive product and the newly introduced Oracle Social Network)

WebCenter Portal consists of the WebCenter Suite, including the WebLogic Portal and WebCenter Interaction (both from Oracle's acquisition of BEA acquisition) and WebCenter Services. Oracle has been on the UXP path for several years, and the rebranding around WebCenter is clear evidence. Oracle continues to address its multiple-portal issues through ongoing convergence into WebCenter Portal. Gartner estimates that product garners 80% of all Oracle's portal revenue.

Strengths

- Leveraging successful portal and related components from its acquisitions, WebCenter constitutes a strong vision for the UXP. Oracle is firmly established as an infrastructure and application provider.
- Oracle is growing its share of the portal product market at a faster-than-average pace, and not only via acquisition.
- Oracle's strategy of integration, in-context social, mobile delivery and "faceless" portals is among the best in the industry. It's backed up with an aggressive and well-executed Fusion Middleware strategy.

Cautions

- Oracle WebCenter encompasses a large and growing suite of products, some of which overlap in functionality. Extensive investment in Oracle systems and skills is required to play here, and the size, cost and complexity of the suite may be too much for some customers to consume easily.
- Oracle has worked hard to rationalize its various portal products, including clarifying the road map toward WebCenter from a variety of legacy portal products developed at Oracle and acquired from BEA, Sun and PeopleSoft. However, the path to convergence is long, and Oracle is burdened with the necessity of maintaining several legacy portal products. Such a requirement could sap resources that would otherwise be devoted to consolidation and innovation. In some cases, Oracle sales representatives continue to muddy the waters by recommending legacy products, rather than the strategic WebCenter Portal offering.
- Oracle Fusion Applications have only recently been released; the positive impact and natural attraction between WebCenter Portal and Oracle Fusion Applications remains to be seen.

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RED HAT (JBoss)

JBoss is Red Hat's middleware division, which offers JBoss Enterprise Portal Platform (EPP) v.5.10 and JBoss Site Publisher v.5.1, both released in December 2010. Version 5.2 will be released in late in 2011. JBoss has partnered with eXo Platform to create GateIn, a joint project intended to unite the middleware strengths of JBoss with eXo's user-centric, content management and collaboration qualities. Based in Paris, France, eXo is a software product and services organization that began by building the industry's first Java portal container. Red Hat's open-source qualities often lend themselves to lean-portal initiatives, although the combination with eXo results in a more comprehensive UXP.

Strengths

- As a well-known enterprise open-source company with resources, visibility and establishment among large organizations and SIs, Red Hat frequently attracts customers looking for lower-cost, open-source portal options. JBoss exhibits good traction with Accenture, ATOS and HP, among other influential SI firms, which have availed themselves of JBoss to offer their own, often industry-specific solutions.
- JBoss's relationships with eXo and the development of GateIn and Site Publisher broadens the scope and user appeal of the platform, bringing it closer to a UXP proposition for the Java and open-source communities.
- JBoss tends to favor larger customers with substantial, innovative IT departments. For these types, it can be flexible to support systems requiring custom development, unique security rules, and the mixing and mashing of different frameworks.

Cautions

- The continued murkiness of the more than two-year relationship with eXo belies an absence of a high-level portal or UXP strategy for JBoss. The organization hasn't decided whether it will drive an evolution up the middleware stack toward UXP, or wait, until the market becomes commoditized, at which point vendors will be differentiated only on cost. Although eXo brings JBoss EPP more functionality and usability, the partnership carries little visibility in markets outside Western Europe. The eXo relationship and joint offerings could lead to product fragmentation and divergence of interests.
- A customer tendency to look at Red Hat primarily because of its low startup costs tends to lower expectations of the software, causing organizations to treat it as a commodity and not to push innovation, compared with other platforms. Some customers report

- treating JBoss Portal as a "throwaway project" platform, while others contend that on software acquisition, savings are expended on relatively higher integration and implementation costs.
- Despite significant progress on usability gained in partnership with eXo, some customers still complain about the usability of ECM and other portal functions that require business user interaction. Meanwhile, some key capabilities, such as full REST support for the page management system, will have to wait for the JBoss middleware upgrade to v.6.0, which won't occur until end of 2012.

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SALESFORCE.COM

Although renowned as an innovative and successful SaaS provider, salesforce.com's ability to address a variety of portal needs has thus far remained a well-kept secret. Organizations such as Toyota, Kelly Services and Groupon are using Force.com to build portals for internal-, customer- and partner-facing portals. Salesforce.com meets traditional portal criteria from a functional perspective, while using its social software capability, Salesforce Chatter, to engage users in a "social enterprise portal." Salesforce.com recently introduced Siteforce, which provides an easy way to build and manage websites and portals and is likely to serve as a home for salesforce's evolving portal and UXP offerings. Most of salesforce.com's customers use the platform as a lean offering, although, as more critical business applications move to the cloud, it will serve as a UXP for some organizations.

Strengths

- As a bona fide enterprise vendor already in the cloud, salesforce.com has long experience overcoming the objections to cloud portal services. Privacy, data portability, integration with back-end systems and directories, and customization issues are on their way to being resolved. Salesforce.com's cloud expertise will appeal to companies looking to benefit from the scalability, elasticity and the low/predictable costs of cloud portal offerings. Most portal competitors have been moving reluctantly in this direction.
- Salesforce.com's portal platform offers ready alignment with important enterprise applications, especially CRM and customer service, which are already hosted by salesforce.com. As it extends its business application footprint, salesforce.com will provide a compelling case for customer- and supplier-facing portals running on its platform.
- Salesforce.com has engendered high user adoption, satisfaction and loyalty, compared with most other providers. Customers report high user adoption, compared with most traditional portals, with Chatter integration often accounting for viral growth inside and among enterprises.

Cautions

- Salesforce.com is relatively unknown as a portal vendor, and its portal offering is hard to find. The newly introduced Siteforce may be the future focal point for portal and WCM efforts, but, initially, it may require a step back toward simplicity to ensure ease of adoption.
- Force.com offers portal capability only as a service. Risk-averse organizations with sensitive data or the need for heavy customization may find the implications of an exclusively cloud portal service too difficult to overcome. A hybrid on-premises/cloud approach is not available from salesforce.com alone.
- Although user participation has been "sky high" (in the words of one customer with which Gartner spoke), the licensing implications of widespread use can appear prohibitive. Organizations looking to support large and expansive user bases should ask salesforce.com for its high-volume portal pricing.

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SAP

The SAP NetWeaver Portal offering is evolving along two lines: as a packaged, on-premises portal product and as a set of decoupled services available across many points of interaction, including applications, mobile devices, and cloud services. New features in NetWeaver Portal's seventh generation include the ability for business users to create and manage enterprise work spaces. A new Web Page Composer tool is intended to enable users to customize their own Web and portal pages. The product's latest version, v.7.3, focuses largely on interoperability, with third-party portal and content management mechanisms, as well as SAP's evolving mobile solutions. In addition, SAP has recently co-developed two content management solutions with partner OpenText.

Portal Site Management (PSM) and Portal Content Management (PCM) will provide best-of-breed content management capabilities to more readily suit companies looking to use NetWeaver Portal for content-intensive knowledge management and customer-facing scenarios. The products will be sold and supported by SAP. Most of the SAP NetWeaver Portal customers Gartner speaks with use it for front-ending multiple SAP business applications and business warehouse implementations. SAP NetWeaver is on the UXP path.

Strengths

- Because of its heritage as a business applications vendor, SAP's technology systems

- tend to house authoritative or master data. More than almost any other provider, SAP understands business roles and context, which are vital to creating productive user experiences. SAP customers are largely compelled toward NetWeaver Portal, even if it's to serve as a means to integrate with other portals.
- NetWeaver Portal v.7.3 has made significant headway in improving its interoperability, stability and performance, given the appropriate scope. New customers report implementation times of as few as three to four months, with light customization. NetWeaver Portal v.7.3 exposes its navigation, administration and content services via APIs for third-party consumption.
- Product enhancements, such as Enterprise Workplaces, appear geared toward supporting business intelligence (BI) and collaborative decision-making scenarios. Organizations looking to build dashboards employing Business Objects in conjunction with SAP's business applications will find NetWeaver Portal v.7.3 to be a flexible and user-friendly environment.

Cautions

- NetWeaver Portal is not the sole focal point of the SAP user experience strategy, and customers regarding it as such should rethink their approaches. Overall, SAP continues to add to an array of options for addressing interoperability and user experience. New offerings include Gateway, a new layer of REST-based services; WorkStream, a social activity stream; and Duet Enterprise, a joint Microsoft SAP product intended to provide interoperability between SAP business applications and Microsoft SharePoint. However, although the portal promises to integrate well with SAP Gateway and SAP Streamwork, some customers intend to use them to circumvent, rather than enhance, their NetWeaver Portals.
- SAP NetWeaver Portal is becoming increasingly unnecessary for organizations running SAP business applications. SAP ERP Manager and Employee Self-Service (ESS), two of the more compelling cases for NetWeaver Portal, no longer depend on it, although SAP just released a bundle (Rapid Deployment Solution) of Manager Self-Service (MSS)/ESS, together with the Portal and continues to promote business packages on the new v.7.3 version. Some Gartner clients that are longtime SAP portal users plan on using other portal providers. Although increasing decoupling from SAP business applications is a positive trend for SAP customers overall, it's causing disruption and confusion for some customers regarding NetWeaver Portal's role. SAP must better convey and execute on its vision to instill more confidence in customers.
- Customers without a substantial investment in SAP as a business application provider — and, in most cases, without many instances of applications such as ERP, CRM, PLM, Supply Chain Management, and Business Objects Enterprise for intranet and extranet scenarios — are advised to look elsewhere for portal capabilities. SAP NetWeaver Portal's strengths are most firmly rooted in the product's understanding of business processes, business user roles and BI across applications.

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TIBCO SOFTWARE

Tibco's overarching business is providing service-oriented architecture (SOA), BPM and integration capabilities to enterprises. Tibco's portal offering, PortalBuilder, has lean characteristics and leverages this foundation to offer organizations a platform for delivering user experiences and mashup-style composite applications.

(Note: Tibco Software did not respond to requests for supplemental information for this Magic Quadrant, so Gartner's analysis is based on other credible sources, including public information, Tibco's website, discussions with PortalBuilder customers, our day-to-day interactions with Tibco users and information provided for the 2010 edition of this research.)

Strengths

- Tibco Software PortalBuilder's most direct value is as a front end for its integration, BPM and SOA customers. Tibco's information exchange technology also lends itself particularly well to portals supporting B2B collaboration.
- With its emphasis on integration, BPM, composite applications and social constructs, Tibco could complement the more popular portals, providing a portal fabric on which portals and other UI mechanisms work.
- Longtime Tibco Software customers rate PortalBuilder highly, compared with other products, for flexibility, extensibility, scalability and performance.

Cautions

- Despite its long heritage in the portal market, Tibco's PortalBuilder has barely been visible lately to customers and prospects. Gartner's customers rarely bring up Tibco Software during portal discussions. Marketing and support material for PortalBuilder is hidden under more-prominent offerings.
- As Tibco's priorities have shifted toward social (via tibbr) and BI, innovation for PortalBuilder has appeared to suffer. Tibco's portal customers complain that the product has failed to stay in step with other portal products in terms of functionality and usability.
- Tibco PortalBuilder customers report lower-than-average ratings among portal providers for value relative to cost, TCO and customer support.

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