

The Forrester Wave™: Web Content Management Systems, Q1 2017

Six Solutions Stand Apart, While Others Are Heavily Investing

by Mark Grannan
January 24, 2017

Why Read This Report

In our 25-criteria evaluation of web content management system (web CMS) providers, we identified the 15 most significant ones — Acquia, Adobe, Crownpeak, Episerver, e-Spirit, Hippo (BloomReach), IBM, Jahia, Magnolia, OpenText (TeamSite), OpenText (WEM), Oracle, Progress Software, SDL, and Sitecore — and researched, analyzed, and scored them. This report shows how each provider measures up and helps application development and delivery (AD&D) professionals make the right choice.

Key Takeaways

Acquia, Adobe, Episerver, Hippo, Sitecore, And SDL Stand Apart In A Dynamic Market

Forrester's research uncovered a market in which Adobe, Acquia, and Episerver lead, with Hippo, Sitecore, and SDL close behind. Crownpeak, e-spirit, IBM, Jahia, Magnolia, Oracle, OpenText TeamSite, OpenText WEM, and Progress all offer competitive options, but lag behind in various ways.

Buyers Need Smart Content, Targeted Experiences, And Agile Operations

The web CMS market is changing because more organizations recognize the necessity of contextual digital experiences. Every vendor in this landscape is tracking toward this goal.

Semantic Content, APIs, Cloud, And Marketing Features Are Key Differentiators

As static websites fade away, functionality to manage, deliver, and optimize dynamic content across digital touchpoints dictates which providers provide the most value. Vendors that can provide scalable, extensible, easy-to-use tools position themselves to win.

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Related Research Documents

[Content And Commerce Technology: Traditional Marriage Dynamics Don't Apply Anymore](#)

[The Rise Of The Headless Content Management System](#)

[Vendor Landscape: Web Content Management Systems, 2016](#)

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Web CMS Evolves To Support A Broader Mandate

Web CMS's underlying elements are undergoing a radical transformation. Originally, web CMS supported static web page authoring and production sites managed by technical teams, commonly AD&D professionals. Then, vendors added advanced capabilities for separation of content and presentation, what you see is what you get (WYSIWYG) authoring with drag-and-drop tools, and configurable approval processes supporting faster, more complex digital engagement scenarios. Now, even these advanced capabilities are commodities.

What now defines web CMS? One senior vice president of digital experience at an agency told us that “core CMS is definitely a commodity; but as experience management challenges grow, web CMS must support a much broader mandate.” This digital experience platform mandate demands consistent, flexible support across every customer journey.¹ Web CMS's key capabilities such as semantic insight, APIs, cloud, and continuous delivery are reshaping web CMS's relevance to digital experience. Adjacent capabilities for commerce, marketing, self-service, testing, targeting, and optimization further stitch web CMS into the core fabric of a broader digital experience platform.

Four Key Roles Need Specific Web CMS Strengths

Web CMS serves many masters inside today's enterprise organization. While every organization is unique, four key roles within the enterprise have specific needs that will shape web CMS selection:

- › **Content authors and managers need semantic structure.** Content taxonomy and metadata is reborn with new semantic insight and solutions for autotagging assets. As one customer reference told Forrester, “Because of the easy content metadata structure, we've been able to launch an enterprise taxonomy for the first time ever.” Another customer reference told us that this new capability lies at the heart of their cross-site publishing efforts.
- › **Digital architects need both front-end and back-end APIs.** Front-end APIs extend the web CMS reach beyond the web. One customer reference told us, “We're really pleased because we didn't have to build a separate CMS under the app, and customers now maintain a shared ‘to read’ list on both the tablet app and website.” While back-end APIs should allow for less customization and greater agility, as one customer reference told us, “It's a big monolithic app and takes hours to deploy. So we chose to wrap it in an aggregation layer, which allows us to be much more dynamic.”
- › **Web operations specialists need scalable tools.** Millions of concurrent visitors? Those who focus on web operations feel the pain of legacy systems; as one customer reference told us, “We had to fine-tune (the solution) so it didn't run like a dog, which meant lots of arcane settings had to be tweaked.” But streamlined administrative tools and contractual terms can make this easy. As one head of enterprise web services reference told us, “We are a multidivision company, but everything is in one code base, one template. Today, 70+ sites run on the same instance, saving tons of money.”

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- › **Marketers need contextual design tools with built-in testing and optimization.** Yesterday's web design wish list has become table stakes. One customer reference told us, "We had to move off (legacy product) because it was clunky, with no support for modern standards. To make a site mobile, you had to give up your first-born child." In 2016, 60% of digital experience leaders chasing the promise of personalization turn to their web CMS solution — the top choice.² Today, references tell us that they're starting to segment, target, and test, but, overall, the features are immature or skills missing to take advantage of them.

Web CMS Evaluation Overview

To assess the state of the web CMS market and see how the products stack up against each other, Forrester evaluated the strengths and weaknesses of the top 15 web CMS products. After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria. We evaluated products against 25 criteria, which we grouped into three high-level buckets:

- › **Current offering.** Our evaluation of current capabilities focused on functional capabilities in four core areas: content structure and metadata, experience management features for practitioners, technical product architecture, and packaged extensions.
- › **Strategy.** We evaluated each vendor's go-to-market strategy in terms of overall vision and road map, cloud deployment options and track record, service partner program, pricing transparency, and developer program.
- › **Market presence.** The market presence criteria, which determine the size of the symbol on the Forrester Wave graphic but have no weight in terms of overall scoring, include installed base of enterprise logos and global footprint for technical and account services.

Evaluated Vendors And Inclusion Criteria

Forrester included 15 vendors in the assessment: Acquia, Adobe, Crownpeak, Episerver, e-Spirit, Hippo (now BloomReach), IBM, Jahia, Magnolia, Progress, Oracle, OpenText (TeamSite), OpenText (WEM), SDL, and Sitecore. Each of these vendors has (see Figure 1):

- › A track record as the primary solution or essential supporting pillar for web CMS in large organizations. Specifically, current Forbes Global 1000 customers cite them as a strategic customer-facing or partner-facing web platform.
- › Forrester clients that express interest in learning more about the evaluated vendors, frequently asking about the evaluated vendors within the context of inquiry, advisory, and/or consulting.

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- › Enterprise customers and local operations (support and account management) in at least two major regions (North America, South America, Europe, Asia Pacific, Middle East and North Africa, Africa) for at least the past year.
- › Three referenceable, enterprise, current customers (using this version or a recent as-a-service release).
- › Regional or global service partners who have supported enterprise-level deployments in the past year.

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FIGURE 1 Evaluated Vendors: Product Information And Selection Criteria

| Vendor | Product evaluated | Version release date |
|--------------------|-------------------------------------|------------------------------|
| Acquia | Acquia Cloud | Drupal 8.2 (October 2016) |
| Adobe | Adobe Experience Manager Sites | v. 6.2 (April 2016) |
| Crownpeak | Digital Experience Management (DXM) | N/A |
| e-Spirit | FirstSpirit | v. 5.2 (September 2016) |
| Episerver | Episerver CMS | v. 9.1 (Spring 2016) |
| Hippo (BloomReach) | Hippo DX (BloomReach Content) | v. 11 (May 2016) |
| IBM | Digital Experience Manager | v. 8.5 CF12 (April 2016) |
| Jahia | Digital Experience Manager | v. 7.1 (April 2016) |
| Magnolia | Magnolia CMS | v. 5.4.9 (September 2016) |
| OpenText | TeamSite | v. 8.2 (July 2016) |
| OpenText | Web Experience Management | v. 16 (May 2016) |
| Oracle | WebCenter Sites | v. 12.2.1.0 (September 2016) |
| Progress | Sitefinity CMS | v. 9.2 (October 2016) |
| SDL | SDL Web | v. 8.3 (June 2016) |
| Sitecore | Sitecore Experience Platform | v. 8.2 (September 2016) |

Vendor inclusion criteria

1. Experience as the primary solution or essential supporting pillar for web CMS in large organizations. Specifically, current Forbes Global 1000 customers cite them as a strategic customer-facing or partner-facing web platform.
2. Forrester clients express interest in learning more about the evaluated vendors, frequently asking about the evaluated vendors within the context of inquiry, advisory, and/or consulting.
3. Enterprise customers and local operations (support and account management) in at least two major regions (North America, South America, Europe, APAC, MENA, Africa) for at least the past year
4. Three referenceable, enterprise, current customers (using this version or a recent -aaS release)
5. Regional or global partner/implementers who have supported enterprise-level deployments in the past year

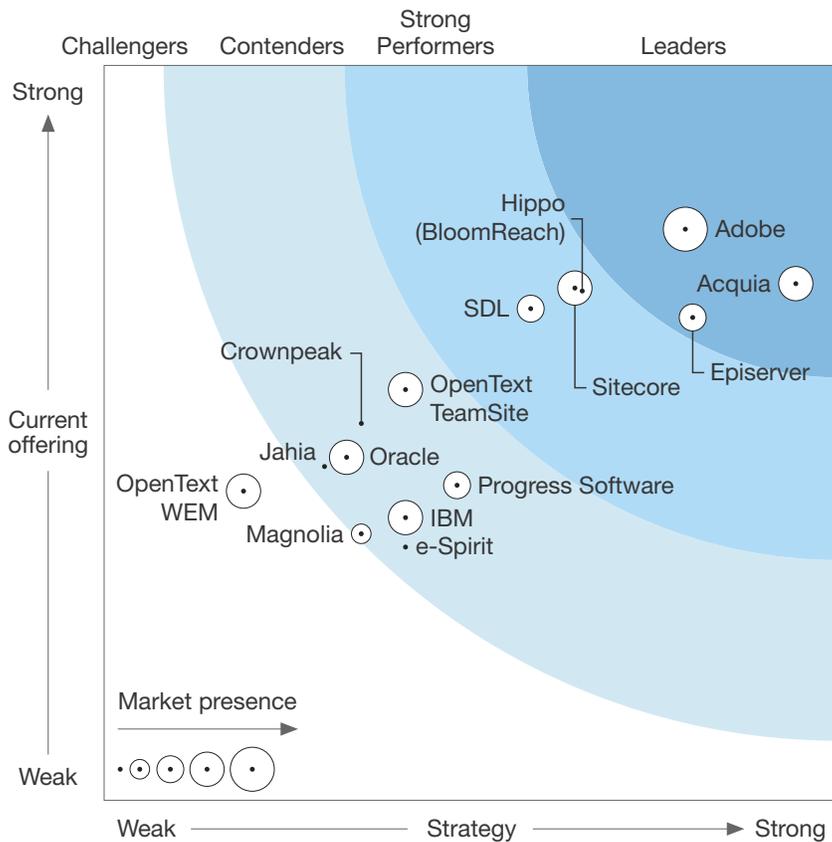
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Vendor Profiles

This evaluation of the web CMS market is intended to be a starting point only. We encourage clients to view detailed product evaluations and adapt criteria weightings to fit their individual needs through the Forrester Wave Excel-based vendor comparison tool (see Figure 2).

FIGURE 2 Forrester Wave™: Web Content Management Systems, Q1 '17



FORRESTER RESEARCH
The Forrester Wave™

Go to Forrester.com to download the Forrester Wave tool for more detailed product evaluations, feature comparisons, and customizable rankings.

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FIGURE 2 Forrester Wave™: Web Content Management Systems, Q1 '17 (Cont.)

| | Forrester's weighting | Acquia | Adobe | Crownpeak | Episerver | e-Spirit | Hippo (BloomReach) | IBM | Jahia | Magnolia | OpenText TeamSite | OpenText Web Experience Mgmt. | Oracle | Progress | SDL | Sitecore |
|-------------------------|-----------------------|--------|-------|-----------|-----------|----------|--------------------|------|-------|----------|-------------------|-------------------------------|--------|----------|------|----------|
| Current offering | 50% | 3.50 | 3.87 | 2.55 | 3.27 | 1.71 | 3.45 | 1.91 | 2.26 | 1.80 | 2.78 | 2.09 | 2.32 | 2.13 | 3.33 | 3.47 |
| Content | 30% | 3.90 | 4.50 | 3.00 | 2.60 | 2.30 | 4.00 | 2.00 | 2.70 | 2.20 | 3.10 | 2.30 | 2.30 | 2.60 | 3.60 | 3.70 |
| Operations | 25% | 3.60 | 4.40 | 1.60 | 4.00 | 1.60 | 3.40 | 2.40 | 2.20 | 1.00 | 3.00 | 2.40 | 2.80 | 1.60 | 3.60 | 4.20 |
| Architecture | 30% | 3.70 | 2.70 | 3.70 | 3.40 | 1.60 | 3.60 | 1.60 | 2.30 | 2.50 | 2.30 | 2.00 | 2.40 | 2.20 | 3.80 | 2.80 |
| Extensions | 15% | 2.10 | 4.05 | 0.95 | 3.10 | 0.90 | 2.10 | 1.50 | 1.40 | 0.95 | 2.70 | 1.35 | 1.40 | 1.90 | 1.40 | 3.10 |
| Strategy | 50% | 4.70 | 3.95 | 1.75 | 4.00 | 2.05 | 3.25 | 2.05 | 1.50 | 1.75 | 2.05 | 0.95 | 1.65 | 2.40 | 2.90 | 3.20 |
| Vision | 35% | 5.00 | 5.00 | 2.00 | 5.00 | 3.00 | 3.00 | 3.00 | 3.00 | 2.00 | 3.00 | 1.00 | 3.00 | 3.00 | 3.00 | 4.00 |
| Cloud | 20% | 4.00 | 1.00 | 3.00 | 3.00 | 1.00 | 5.00 | 1.00 | 0.00 | 1.00 | 1.00 | 0.00 | 2.00 | 2.00 | 3.00 | 1.00 |
| Service partner program | 20% | 5.00 | 5.00 | 1.00 | 3.00 | 1.00 | 1.00 | 3.00 | 1.00 | 3.00 | 3.00 | 3.00 | 1.00 | 1.00 | 3.00 | 3.00 |
| Pricing transparency | 5% | 3.00 | 0.00 | 1.00 | 1.00 | 0.00 | 0.00 | 0.00 | 1.00 | 1.00 | 0.00 | 0.00 | 0.00 | 3.00 | 1.00 | 0.00 |
| Developer program | 20% | 5.00 | 5.00 | 1.00 | 5.00 | 3.00 | 5.00 | 1.00 | 1.00 | 1.00 | 1.00 | 0.00 | 0.00 | 3.00 | 3.00 | 5.00 |
| Market presence | 0% | 4.00 | 5.00 | 1.00 | 3.00 | 1.00 | 1.00 | 4.00 | 1.00 | 2.00 | 4.00 | 4.00 | 4.00 | 3.00 | 3.00 | 4.00 |
| Product customer count | 50% | 5.00 | 5.00 | 1.00 | 3.00 | 1.00 | 1.00 | 3.00 | 1.00 | 1.00 | 3.00 | 3.00 | 3.00 | 3.00 | 3.00 | 5.00 |
| Global presence | 50% | 3.00 | 5.00 | 1.00 | 3.00 | 1.00 | 1.00 | 5.00 | 1.00 | 3.00 | 5.00 | 5.00 | 5.00 | 3.00 | 3.00 | 3.00 |

All scores are based on a scale of 0 (weak) to 5 (strong).

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Leaders

- › **Acquia Cloud champions Drupal, while new products seek traction.** Boston-based Acquia offers a commercial service supporting open source Drupal. Acquia Cloud's strengths center on hosting Drupal 8 and providing Acquia Lightning — a curated set of Drupal 8 modules that jumpstart development. While references cited nascent Drupal 8 modules, natively, Acquia Cloud provides strong support for core content and component architecture. Clients looking for content analytics, segmentation, multisite management, and API-first delivery features must look to Acquia Lift and Acquia Cloud Site Factory — neither of which share a common UI or open source heritage with Drupal today.

Acquia's strategy focuses on APIs, decoupled Drupal 8, and scalable and secure cloud deployment. While the cloud road map includes containerization via Docker and automation via Apache Mesos, clients looking to run in hybrid (i.e., cloud and on-premises) will need to look elsewhere. Acquia has lined up a large cast of services partners across many verticals and geographies, which have supported very large global rollouts, but some cite concern where Acquia's services overlap their own. Conversely, Acquia's strong developer program plays the role of client and partner-enabler and ambassador to the open source community.

Acquia Cloud by itself is a good fit for organizations making a conscious bet on Drupal and cloud and that need a partner with the right support and SLAs to match global, enterprise needs. Clients who need modern marketing tools and robust multisite support must invest in Acquia Lift and Acquia Cloud Site Factory.

- › **Adobe Experience Manager Sites remains top marketing choice.** San Jose, California-based Adobe continues to invest in AEM Sites while growing the broader portfolio. AEM Sites' marketing strengths rely on embedding digital asset management (DAM), analytics, and targeting features by default, supplemented with modular add-ons. AEM enables algorithmic asset tagging and content analytics, enabling content reuse. However, references using both products tell us the discrepancy between the full DAM solution (AEM Assets) and DAM capabilities in AEM Sites is confusing. Also on the down side, Adobe Sites doesn't fully leverage the advantages of cloud unless clients subscribe to AEM Managed Services.

Strategically, Adobe is accelerating the creation and reuse of content by pushing toward microservices and machine learning that will enable autcreation of assets and experiences. In the next 18 months, AEM Sites will enable faster, easier contextual design, while continuing to cross-pollinate features from the broader portfolio. AEM Sites' current cloud strategy is a weakness, as the only option is a managed-hosted flavor of platform-as-a-service (PaaS). Its pricing is not transparent, which Forrester clients have historically complained about. AEM's strong developer program is only rivaled by its creative and marketing reputation.

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AEM Sites as a standalone is well-suited to a large number of scenarios in addition to marketing, but the marketing reputation and price point may give pause to those with simpler requirements. The broader AEM family is relevant to brand-centric, mature digital organizations that are reining in marketing touchpoints under one roof.

- › **Episerver builds on cloud reinvention, while North American credibility grows.** In 2015, private equity firm Accel-KKR bought Stockholm-based Episerver and .NET competitor Ektron, merged them under the Episerver brand, and launched a PaaS offering. Episerver is solid across core web CMS extensibility and architecture, keeps pace with modern developer expectations, and is pushing ahead in practitioner features like testing and personalization. While Episerver has begun embedding its search and indexing tool into the core offering, its marketing features follow a modular, add-on approach. In less complex scenarios, references cited this as a strength over Sitecore and Adobe.

Episerver's vision is heavily intertwined with Azure's cloud platform to support new capabilities such as machine learning. Its PaaS offering still demands future investment to enable cloud-native scaling and automation. Its service partner ecosystem remains relatively nascent in North America, causing Episerver to appeal more to midsize rather than large enterprises. Customer references gave us positive feedback about Episerver's growing developer program.

Episerver has emerged as a well-rounded, midsize enterprise solution, especially for those clients with a European focus or early adopters looking to boost North American expansion. However, Episerver's progressive reinvention with investment in cloud and recent acquisitions will continue to move the target toward marketing-centric, digital experience scenarios in the next year.

Strong Performers

- › **Hippo DX's API and cloud-first strategy outshines startup status.** San Francisco-based BloomReach acquired Hippo CMS during our evaluation process. Hippo rebuilt its solution in 2011, giving it modern front-end and back-end APIs. While some underlying architectural components lag behind (e.g., Apache JackRabbit instead of Apache Oak), Hippo leads with native, PaaS deployment. In spring 2016 Hippo launched Hippo onDemand, a PaaS offering, which leverages cloud tools (e.g., Docker) to accelerate administration and maintenance. Hippo's extensions are limited, but references cited solid flexibility to add the Relevance Module later.

While much of Hippo's vision centers on strategic elements building off of BloomReach's data and machine learning capabilities, the tactical road map includes improving practitioner ease of use and native cloud hooks to reduce maintenance and administration in their OnDemand offering. However, given both Hippo's and BloomReach's startup status and short enterprise track record, limited agency and SI relationships will likely hinder moving into more traditional, enterprise scenarios. From a grassroots standpoint, Hippo's modern tools and open source approach have proven successful in growing the developer program.

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Hippo is currently best suited to midsize enterprise organizations looking for a modern web CMS to underpin their broader digital experience platform. The OnDemand flavor only broadens digital architect appeal. In the near future, BloomReach's data and machine learning may shape a new course with increasingly bleeding-edge marketing scenarios.

› Sitecore Experience Platform's full featured, suite approach begins to streamline.

Copenhagen-based Sitecore built its full-featured, .NET web CMS reputation by embedding marketing capabilities in the product. Very recently, Sitecore announced v.8.2, wherein Sitecore eXperience Accelerator (SXA) brings a component library and the promise of native Azure hooks. Sitecore's practitioner tools (e.g., testing, optimization, customer data profiles) for marketing needs remain strong as a native capability, but references said these do not compete against best-of-breed tools. While SXA may cure some operational pains, unfortunately, current references said this large feature set adds complexity to operations.

Sitecore's vision and road map align well to fix current shortcomings. Sitecore plans to renew many marketing features that Sitecore embedded (e.g., eXperience database, XDB) to better satisfy enterprise needs. The bigger gap, historically, has been lack of a cloud strategy, but Sitecore will add native Azure-managed services in 2017. Sitecore's service partner and developer ecosystems are some of the most globally competitive in this market, which smooths over some cloud gaps.

Sitecore Experience Platform remains a strong fit for organizations that need a feature-rich, enterprise-scale web CMS. Sitecore's 2017 commitment to PaaS will make it more attractive to buyers focused on faster time-to-value.

› SDL Web's cloud reinvention is sparking growth and momentum, despite uncertainty.

Maidenhead, England-based SDL released Web 8 in late 2015. The product now has a modular, component-based architecture, content intelligence, and biggest of all, architecture to run easily in the cloud and operate headless. SDL continues its legacy of global content with strong translation workflows and multisite management with flexible inheritance. SDL also focuses on accelerators to standardize and speed up implementations. However, customer references told us that practitioner tools (e.g., segmentation) are not all strong, which makes sense as SDL replaces the marketing features it's divesting.

SDL's vision focuses on cloud and API investments that started with Web 8. However, web's road map increasingly intertwines with the language and knowledge management (KM) solutions of its portfolio (e.g., allow for native consumption of KM documents in web). SDL's service partner ecosystem and developer program are still strong, but partner references tell us they began looking for additional product partnerships when SDL's organizational changes began in 2015.³

SDL Web 8 is ideally suited for large companies that need strong multisite and multilanguage tools to support global operations. Increasingly, SDL is also well-suited to developer-centric organizations that want a headless CMS approach but don't see the smaller players as enterprise

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ready. In the future, the broader SDL portfolio may be most relevant to global organizations with complex KM and digital experience needs, across many languages, needing a unified solution to solve all three challenges.

Contenders

- › **OpenText TeamSite renews product strengths but must overcome rocky history.** Waterloo, Canada-based OpenText acquired TeamSite from HP this year. TeamSite version 8 brought a new UI, improved component-based design, contextual editing and preview, mobile app management, and analytics and reporting. However, TeamSite still trails leaders on marketing-centric tools for practitioners to dynamically assemble segments and test and target content — this will require their Optimost solution. Architecturally, the solution remains primarily focused on on-premises deployments, although there is a managed service offering on AWS and the OpenText Cloud.

OpenText's current, high-level plan dictates TeamSite will take center stage of the Customer Experience Management (CEM) portfolio, taking the place of the Web Experience Management (formerly Vignette) product. The vision and road map to support this strategy rely on cross-pollinating OpenText platform services and productizing support for cloud tools (e.g., Docker). References tell us that TeamSite's history of ownership and management changes cast doubt on the service partner and developer ecosystems, which could slow revitalization efforts. Luckily, the TeamSite customer base and support model remains global and should be ready to scale up if OpenText can curtail churn and attract new clients.

OpenText TeamSite is a logical fit for existing TeamSite clients on older releases, as many of their problems were solved in 8.x releases. TeamSite also makes sense for regulated businesses that leveraged WEM and now need a more modern web CMS but want to keep strong ties with OpenText.

- › **Progress's Sitefinity's modest features will coexist with a new cloud suite.** Bedford, Massachusetts-based Progress offers Sitefinity, which it acquired through its Telerik acquisition in 2014. Sitefinity has improved its architecture with the addition of a model-view-controller (MVC) library, named Feather, but the on-premises model faces traditional scaling constraints. Sitefinity's extensibility, harkening to the Telerik ownership, is strong, but Progress' relationships with other best-of-breed software providers is limited. Sitefinity references cited the current practitioner tools as well suited to the basics but limited for more mature digital marketing needs.

Sitefinity's vision and road map are solid, but Progress is betting on the recently announced DigitalFactory solution — a cloud, native bundle including web CMS, mobile development platform, and marketing capabilities. DigitalFactory, now in limited release, is the primary cloud strategy, whereby the Sitefinity offering will remain fully on-premises. Progress is building its partner network, but today this remains limited to a small number of globally, credible partners. Meanwhile, Progress leverages a Telerik heritage for relatively transparent pricing and solid developer program.

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Sitefinity remains a solid choice for midsize enterprise clients, primarily in North America, who commonly see the limited feature set as aligned with their needs. Going forward, DigitalFactory may change this fit by focusing on a cloud suite of business-enabled tools for rollouts across federated business units in very large organizations.

- › **Crownpeak is ripe for multisite scenarios but has limited developer appeal.** Los Angeles-based Crownpeak experienced big changes in the past year: acquisition by a private equity firm, executive leadership changes, and acquisition of a parallel vendor (ActiveStandards). Crownpeak retains its highly scalable foundation on AWS and has improved dynamic content and asset reuse with a component library framework. Crownpeak's content localization and multisite management capabilities are strong. However, references tell us it lacks segmentation tools, robust APIs (front- and back-end), and is limited by a narrow extension strategy.

Crownpeak's strategy focuses on doubling down on scalable, repeatable experiences and adding a new pattern of modernizing legacy applications without the need to replatform. The weakness in the strategy hinges on its being pure AWS while providing too few API hooks, which fails to enable a key audience: developers. Additionally, the multilanguage, multisite vision and road map are not differentiated from those of other players such as Acquia and SDL. Customer references tell us that marketing capabilities are well suited to secondary markets but prove insufficient in core markets with heavy marketing activity.

Crownpeak is best suited to organizations that need to rationalize and govern multilanguage, multisite scenarios or need a cheaper way to modernize the presentation layer of legacy systems. Crownpeak's uniqueness lies with the quality management capabilities it acquired via ActiveStandards, which is now a module included with the product.

- › **Oracle Web Center Sites begins to streamline, bets on new cloud strategy.** Redwood Shores, California-based Oracle has bundled its Web Center Sites (WCS) as part of a portfolio of "content, sites, and portal," including business process connectors. Oracle WCS boasts a component-based design model, and references cite using the product to support multilingual needs at scale. Its tooling for back-end integration can suit the most complex organization's needs. However, customer references (some on older releases) we spoke with use their own API layer and front-end framework, citing a lack of modern developer tools. Oracle WCS relies on the larger Oracle portfolio for broad appeal, but references tell us the prebuilt connectors don't translate into easy implementations or a seamless portfolio.

Oracle WCS's vision and strategy has already laid the groundwork for a new content-as-a-service (CaaS) solution within a broader Content and Experience Cloud offering. This new offering promises to meld the portfolio while providing a modern, cloud-native architecture, API-centric tool set for developers, and a modern UI for practitioners. For legacy Oracle WCS clients, the Sites Cloud Service offers a means to run in a hybrid environment; some references tell us they fear being left behind. While Oracle has the resources to realize this strategy, both the developer and service partner ecosystem must rebuild energy and enthusiasm, which will slow customer uptake.

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Oracle WCS remains a good fit for large, complex organizations that commonly use it in conjunction with many other Oracle clouds and individual products. Going forward, the new CaaS solution and broader Content and Experience Cloud offering could be a good fit for Oracle customers and may attract new customers to the Oracle Cloud if it delivers on the promise of modern, scalable architecture and native integration with the rest of the portfolio.

- › **Jahia's limited reputation is growing as a holistic, Java-based solution.** Geneva-based Jahia has more than a decade in the European enterprise, open source web CMS, and DX portal market. After receiving a round of funding in mid-2015, Jahia expanded marketing and sales and invested in product development. Jahia's strengths in component architecture (with public and private app store), is buttressed by adaptive design tools. Jahia's weakness is narrow support for cloud architecture outside of a managed-hosted offering. Jahia's extensions for marketing and commerce tell a broader story, but are nascent, and Jahia is backstopping these with partnerships.

Jahia's vision aims to be the full life-cycle version (portal, commerce, marketing, intranet) of a top-tier marketing-centric web CMS. However, that broad scope is only supported by a narrow road map. Additionally, many of Jahia's legacy clients use the product for intranet scenarios, which is out of touch with the broader marketing and commerce vision. Jahia's investment in consumer privacy via project UNOMI, which it has championed within the Apache foundation, could make it attractive for European clients facing new regulations; however, it's still in project stage. Lastly, the partner ecosystem is modest, and references looking for Jahia talent cited the developer program as a concern.

Jahia is a best fit for organizations looking for web CMS product to unify their public and private sites and, in some cases, even run their intranet on the same platform. Jahia's broader portfolio is relevant to the same organizations that want to layer on basic marketing and commerce functionality without the need for a new product or vendor.

- › **e-Spirit's FirstSpirit lacks deep marketing features but looks to reinvent via cloud.** Dortmund, Germany-based e-Spirit has offered a Java web CMS for almost two decades. FirstSpirit is a traditional, on-premises, licensed software solution today with solid chops to manage content independent of presentation, and references leveraged this strength across many languages and countries. However, the product lacks some modern architecture to support front-end and back-end extensibility, while many dynamic features such as adaptive design, segmentation, targeting, and optimization still rely on third parties.

e-Spirit's FirstSpirit vision and road map outshine the current offering by focusing on a new CaaS offering released in September 2016. Additionally, its German-centric go-to-market strategy is evolving with North American expansion, while the product will embrace greater front-end diversity, with lighter, more modern framework support. The developer program is healthy, with approximately 3,000 registered developers, but offers limited events and meet-ups and caters to the German client base.

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e-Spirit's FirstSpirit remains well suited to German companies looking to operate multinational or globally and to others looking for a simpler, less expensive, Java alternative to leaders like Adobe and Hippo. With the arrival of CaaS and new dynamic delivery capabilities, FirstSpirit will become more relevant to progressive, midsize enterprise organizations that already have, or want, separate marketing and optimization tools that integrate easily with their web CMS.

- › **IBM Digital Experience Manager bets on new, Watson-enabled product.** Armonk, New York-based IBM, a long-time veteran of this space, is overhauling its web CMS strategy; however, its IBM Watson Content Hub was not released in time for this evaluation. Its current product, DXM, does boast some strengths, namely the overall extensibility of the solution, which references cited as strength for clients with heavy integration needs. The core of DXM, however, inherits from its WebSphere Portal heritage, whereby modern web development and practitioner-centric workflows are lacking.

The vision for the new product, combined with IBM's broader cognitive focus (e.g., Watson), aligns with a cloud-centric, machine-learning-enabled multichannel CMS. For existing DXM clients, this product vision may feel foreign, and it caused some references to express a fear of being left behind. Additionally, this new product philosophy demands increased transparency with broad developer (e.g., open standards) and prospective audiences (e.g., pricing).

IBM DXM remains suited to large, complex organizations that need a solution that mirrors their complexity — typically IBM shops and current clients who have already invested heavily in the solution. Going forward, IBM's new Watson Content Hub will be a next-generation headless CMS, with machine learning baked into its DNA, which will be most relevant to more progressive, customer-centric brands and retailers who need to operate and innovate faster.

- › **Magnolia's humble roots narrow its footprint, but it will accelerate with cloud.** Basel, Switzerland-based Magnolia has strengths in its pure-play web CMS focus and open source heritage. Magnolia's component design leverages content pools to drive dynamic content, while back-end extensibility builds on open source offers flexible integration. Its weaknesses stem from limited practitioner tooling, and Magnolia's architecture for on-premises deployment, which translates into a stability, but scaling and upgrades carry legacy burdens. Magnolia's prebuilt extensions are limited today, but customer references we spoke with preferred to use the core extensibility to build their own extensions, blunting this downside.

Magnolia's vision includes improved REST API support for JS front-ends, personalization with advanced content pools, and a new PaaS offering dubbed Magnolia Now. Despite Magnolia's small size and European heritage, it punches above its weight with a solid service partner ecosystem and a global footprint larger than that of some competitors. For developers and implementers, the open source foundation is a strength, providing transparency and community, but today the community is small.

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Magnolia CMS is a best fit for midsize enterprise organizations looking for a stable, straightforward, and extensible web CMS, backed by Magnolia's healthy partner program, especially in Europe. In the future, Magnolia is poised to transform with cloud and API-centric architecture, which may appeal to a new class of clients who need more agility with less core customization.

Challengers

- › **OpenText Web Experience Management focuses on DX portal.** Waterloo, Canada-based OpenText is a veteran in the web CMS space with OpenText WEM (formerly the Vignette product). After OpenText's acquisition of TeamSite, WEM will fully embrace DX portal scenarios. Despite this strategic shift, WEM remains a robust web CMS capable of supporting the most complex organizations with robust permissions management, multichannel experience management (e.g., customer communications), and a solid integration partnership with SAP Hybris Commerce. But references tell us the practitioner tools and architecture have fallen behind their needs for engaging, contextual brand experiences.

OpenText's WEM vision and road map are heavily interlaced with the broader OpenText portfolio and will act as add-ons to the core suite. WEM's cloud strategy, partner ecosystem, and developer program back up this strategy, as none are sufficiently robust to regain momentum in the web CMS landscape. Luckily for existing clients, the product will continue to gain benefits from core, platform service improvements across the broader OpenText portfolio.

OpenText WEM is best suited to large, complex organizations that need a DX portal solution with ties beyond the traditional DX platform scope, namely their ECM, call center, and workforce optimization solutions.

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Supplemental Material

Online Resource

The online version of Figure 2 is an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings.

Data Sources Used In This Forrester Wave

Forrester used a combination of three data sources to assess the strengths and weaknesses of each solution. We evaluated the vendors participating in this Forrester Wave, in part, using materials that they provided to us by October 13, 2016:

- › **Vendor surveys.** Forrester surveyed vendors on their capabilities as they relate to the evaluation criteria. Once we analyzed the completed vendor surveys, we conducted vendor strategy briefings to gather further details.

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- › **Product demos.** We asked vendors to conduct demonstrations of their products' functionality. We used findings from these product demos to validate details of each vendor's product capabilities.
- › **Customer reference calls.** To validate product and vendor qualifications, Forrester also conducted reference calls with three of each vendor's current customers.

The Forrester Wave Methodology

We conduct primary research to develop a list of vendors that meet our criteria to be evaluated in this market. From that initial pool of vendors, we then narrow our final list. We choose these vendors based on: 1) product fit; 2) customer success; and 3) Forrester client demand. We eliminate vendors that have limited customer references and products that don't fit the scope of our evaluation.

After examining past research, user need assessments, and vendor and expert interviews, we develop the initial evaluation criteria. To evaluate the vendors and their products against our set of criteria, we gather details of product qualifications through a combination of lab evaluations, questionnaires, demos, and/or discussions with client references. We send evaluations to the vendors for their review, and we adjust the evaluations to provide the most accurate view of vendor offerings and strategies.

We set default weightings to reflect our analysis of the needs of large user companies — and/or other scenarios as outlined in the Forrester Wave evaluation — and then score the vendors based on a clearly defined scale. We intend these default weightings to serve only as a starting point and encourage readers to adapt the weightings to fit their individual needs through the Excel-based tool. The final scores generate the graphical depiction of the market based on current offering, strategy, and market presence. Forrester intends to update vendor evaluations regularly as product capabilities and vendor strategies evolve. For more information on the methodology that every Forrester Wave follows, go to <http://www.forrester.com/marketing/policies/forrester-wave-methodology.html>.

Integrity Policy

We conduct all our research, including Forrester Wave evaluations, in accordance with our Integrity Policy. For more information, go to <http://www.forrester.com/marketing/policies/integrity-policy.html>.

Endnotes

¹ See the Forrester report "[Vendor Landscape: Digital Experience Platforms.](#)"

² See the Forrester report "[Digital Experience Technology And Delivery Priorities, 2016.](#)"

³ In October 2015, SDL's CEO and founder, Mark Lancaster, stepped down. Source: "Board Change and Update," SDL press release, October 2, 2015 (<http://www.sdl.com/about/news-media/press/2015/board-change-and-update.html>).

In January 2016, SDL announced that it would divest assets including social intelligence, marketing automation, and commerce optimization. Source: "2015 Year-end Trading Update," SDL press release, January 20, 2016 (<http://www.sdl.com/about/news-media/press/2016/2015-year-end-trading-update.html>).

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