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Compass Guide to WCM
Consolidated Vendor Scorecard

By: Tony White

ARS LOGICA

Comparative Assessment of the WCM Market's Most Relevant Platforms

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OVERVIEW

The Compass Guide to Web Content Management consists of a series of individual, in-depth evaluations of the WCM technology platforms that Ars Logica considers to be most relevant in the current market. Each report covers one WCM platform and makes no attempt to provide comparative insight. Having been asked repeatedly to publish product comparisons in a single report, Ars Logica now offers this Consolidated Vendor Scorecard, a discrete source that captures (only) the scoring from all 16 Compass Guides to WCM. For far richer detail on these products and vendors, readers should refer to the individual reports.

NOTES & RESOURCES

Sources of Information
Vendor and product information contained in this report was collected via Ars Logica's vendor questionnaire, customer interviews, implementation monitoring, product documentation, Ars Logica's knowledge base, and/or hands-on product testing.

Platforms Included
The Compass Guides include the platforms that Ars Logica considers to be the most significant in the WCM market. While scores in our business and technology categories vary widely, each platform evaluated will be a best-fit given the right use case, and may therefore prove worthy of shortlisting.

Customer Interviews
Ars Logica has interviewed users of every product covered in the Compass Guides.

Implementation Monitoring
Since the 1990s, Ars Logica founder Tony White has kept close tabs on ongoing WCM implementations. Some of this knowledge is represented in the Compass Guide reports.

No Vendor Influence
Ars Logica retains complete editorial control over the Compass Guides and receives no funding in their production.

A Graphic That Matters: How's the Technology? And How is it Exposed?

In the visual representation below of technology platforms in the current WCM market, Ars Logica attempts to provide the most meaningful relative positioning possible of its competitors. On the vertical axis, we answer the question, "How's the technology?" On the horizontal axis, we answer the question, "How -- and how well -- is technology exposed to both business users and other technology platforms?" To see how scores were derived, please refer to Figure 2.

FIGURE 1   Compass Guide to WCM -- Business vs. Technology Considerations

Figure 1 plots the strength of technology platforms in categories of critical importance to business users against the robustness of technical underpinnings.

Source: Ars Logica, Inc.
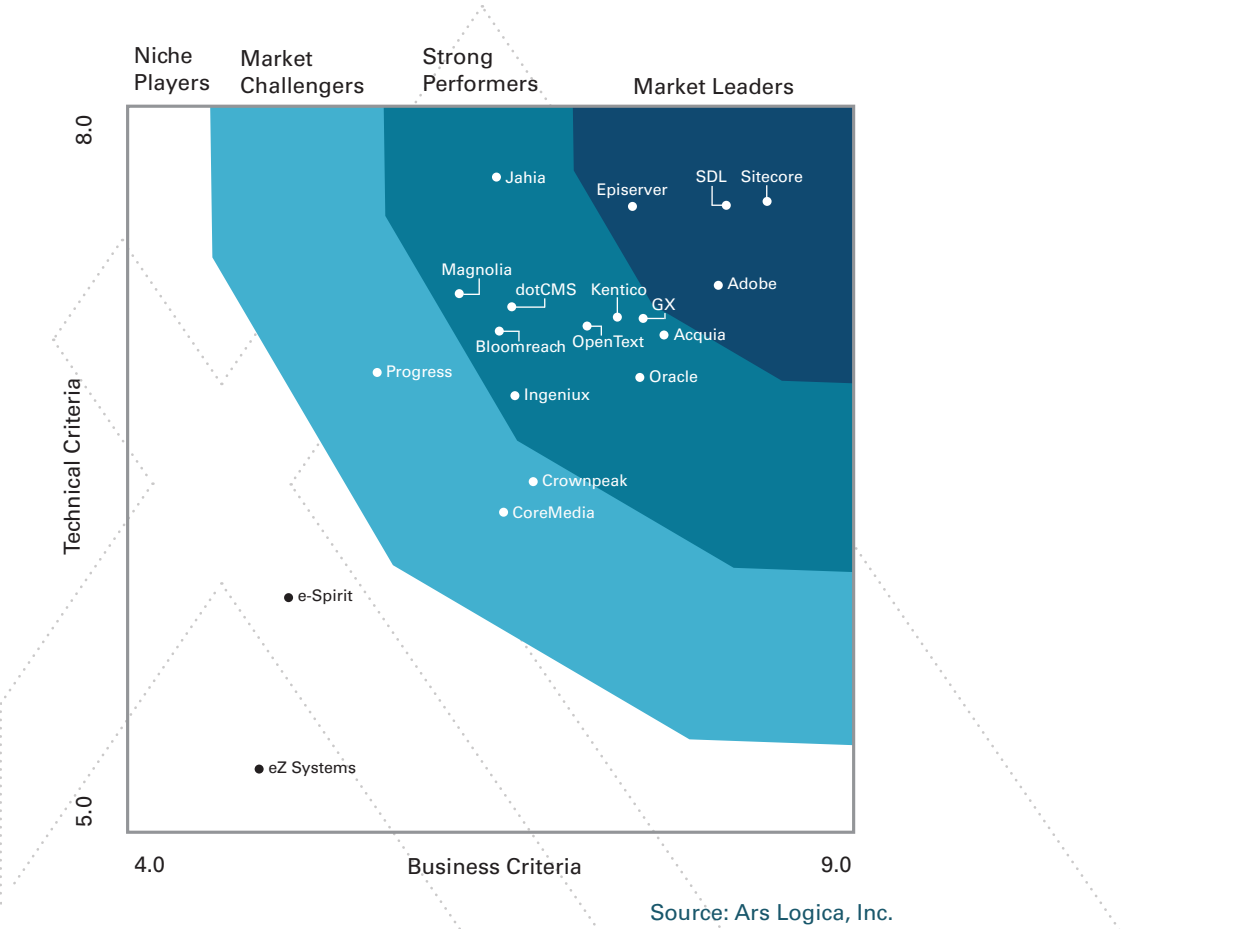
Scores used to generate this graph are based on a scale of 0 to 10 (see Figure 2). For comparative purposes, the axes have been scaled to represent actual score ranges. Sources of information: product testing, customer interviews, vendor briefings, implementation monitoring

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The Scores

Two overall scores for each platform -- one for the business categories and one for the technical categories (headings in red) -- were generated by weighting and summing scores in each of four broad areas (each area consisting of subscores at a level of detail beyond the scope of this Scorecard).

FIGURE 2 Compass Guide to WCM -- Scoring

TECHNOLOGY PLATFORM	Usability & Interface Quality	Content Marketing Tools	Enterprise Tech Stack Leverage	Momentum & Strategic Vision	Overall Business Category Score	Scalability	Flexibility	Development Tools	Ease of Administration	Overall Technical Category Score
	25%	40%	30%	5%		25%	35%	25%	15%	
Sitecore Experience Platform 9.2	8.4	8.6	8.1	8.3	8.39	7.9	8.0	7.6	6.2	7.61
SDL Tridion Sites 9.1	8.0	8.2	8.2	7.6	8.12	8.5	7.5	7.5	6.4	7.59
Adobe Experience Manager Sites 6.5	8.3	8.6	7.1	8.1	8.05	8.2	7.2	7.7	5.2	7.28
Episerver CMS 11	7.7	7.0	8.0	7.0	7.48	7.8	7.8	7.4	6.9	7.57
Acquia Cloud, Drupal 8.7	7.5	7.8	7.5	8.0	7.65	7.8	7.3	6.5	6.0	7.03
GX Software XperienCentral 10.24	8.4	7.2	7.5	6.2	7.54	7.6	7.5	6.0	7.3	7.12
Oracle Content and Experience 19.4	7.1	7.5	8.0	7.0	7.53	7.5	7.2	6.4	6.0	6.90
Kentico 12 SP	7.1	7.4	7.6	7.4	7.39	7.0	7.5	6.8	7.1	7.14
OpenText WEM 16.4	7.2	6.9	7.5	6.5	7.14	8.0	7.0	7.0	6.0	7.10
Jahia 8	6.3	6.7	6.4	7.0	6.53	7.7	8.0	7.7	7.0	7.70
dotCMS Enterprise 5.2	6.4	6.3	7.3	6.0	6.61	7.5	7.2	6.8	7.3	7.19
Bloomreach Experience 13	6.1	6.2	7.2	7.5	6.54	7.3	7.0	6.6	7.8	7.10
Ingeniux CMS 10.3	6.5	6.7	6.8	6.3	6.66	6.5	7.3	6.2	7.2	6.81
Crownpeak DXM October 2019	7.3	6.6	6.7	6.0	6.78	6.2	6.6	6.3	7.0	6.49
Magnolia CMS 6.1	6.2	5.7	6.9	6.4	6.22	7.0	8.4	5.4	7.9	7.23
CoreMedia Content Cloud 10	7.1	6.4	6.6	5.2	6.58	6.2	6.6	6.0	6.5	6.32
Progress Sitefinity 12.1	6.2	5.2	6.1	5.0	5.71	7.0	6.7	7.0	7.7	6.92
e-Spirit FirstSpirit 5.3	5.0	5.0	5.5	3.1	5.06	6.5	6.5	4.0	7.0	5.95
eZ Platform 2.5	4.9	4.8	5.1	4.2	4.89	5.5	5.6	4.3	5.7	5.27

All scores based on a scale of 0 (weak) to 10 (strong).   Source: Ars Logica, Inc.

Sources of information: product testing, customer interviews, vendor briefings, implementation monitoring

MAY 26, 2020

Compass Guide to WCM, Q2 2020

Evaluation of Jahia 8

By: Tony White

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Jahia 8
Product Evaluation

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Date: May 26, 2020

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ARS LOGICA POSITION

Jahia 8 is a digital experience (DX) platform whose fundamental differentiator is excellent performance across the range of technical evaluative categories (first overall technical ranking among platforms evaluated). Particularly significant are its outstanding architectural flexibility (co-ranked second) and robust development tools (ranked fourth), while the product's extreme modularity enables market-leading speed of development, integration, and customization. Customers looking for a foundational best-of-breed platform upon which to unify a range of DX-related initiatives would do well to consider Jahia.

NOTES & RESOURCES

Sources of Information
Some company and product information contained in this report was collected via Ars Logica's 172-item vendor questionnaire. Vendor responses were independently verified through customer interviews, implementation monitoring, product documentation, Ars Logica's knowledge base, and/or hands-on product testing.

Platforms Included
The Compass Guides include the platforms that Ars Logica considers to be the most significant in the WCM market. While scores on our business and technology scorecards vary widely, each platform evaluated will be a best-fit given the right use case, and may therefore prove worthy of shortlisting.

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Ars Logica has interviewed users of every product covered in the Compass Guides, including Jahia.

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Jahia Vendor Overview

Jahia Solutions Group is a Swiss technology vendor strategically focused on simplifying digital experiences. The vendor's self-described primary aim is to help customers better leverage their content and customer data via its cloud-based DX platform, while allowing them to remain connected to existing (and legacy) infrastructure. Founded in Geneva in 2002 and still headquartered in Switzerland, Jahia now locates key executive, development, and sales teams in Boston, Paris, and Toronto. Initially concentrated on the government sector, the vendor has since widened its focus across a wide range of verticals, including consumer brands, education, financial services, government, hospitality, insurance, manufacturing, and technology. Customer examples include Ben & Jerry's, Nationwide, NASA and General Motors. Primary customer targets are usually technically-adept customers with heavy investments in large technology platforms, as well as those looking for a foundational development platform to underpin the building-out and integration of their own stacks. Jahia is a well-rounded product that boasts several key competitive technical strengths and few corresponding weaknesses.

Company Profile

Year Founded: 2002
Headquarters: Geneva, Switzerland
Employees (or FTE equivalents): 90
Geographies: Europe and North America
Revenue: $18 million (est.)
Product Types Offered: DX platform, WCM, range of technology connectors
Commercial or Open Source: Open source, hybrid
Strategic Implementation Partners: Atos, Avantia, Capgemini, Smile, Tribal Worldwide, XumaK
Top Competitors: Acquia, Adobe, BloomReach, Crownpeak, Liferay, Sitecore
Key Vertical Industries: Automotive, consumer brands, financial services, government, hospitality, insurance, manufacturing, public sector, telecommunications, utilities

Product Profile

Product Name: Jahia
Version: 8
Next version release date: Q1 2021
Market segment: Enterprise
Average Subscription Price (Annual): $70,000
Technology Platform: Java
Key Strengths: Outstanding performance across technical evaluative categories, excellent architectural flexibility, robust development tools, extreme platform modularity, high customer satisfaction levels
Key Limitations: Breadth of content marketing tools, UI not as refined as some, lack of market share relative to direct competitors, exclusion from high-profile industry research due to sub-$20 million revenue
Highest-Value Use Case: Technically-adept large enterprise seeking either, (1) a best-of-breed Java-based DX platform, or (2) a foundational platform to unify a range of technology initiatives

Vendor History & Product Evolution

Jahia was founded as a software company, not a professional services firm, as were the majority of DX vendors. Starting in 2002, Jahia took one year to develop the first version of its WCM platform. The first version of the product shipped in 2003, and unlike most WCM products, Jahia was designed from the concept stage as an enterprise-scale, open source, content management platform that combines WCM, document management, and portal technologies in one unified interface. This approach to building the product has resulted from the outset in a very clean technical architecture.

Jahia's first customers were primarily government agencies and academic institutions, verticals in which the vendor is still strong. By 2004, Jahia had become one of the leading open source WCM providers, and the vendor's name had become recognizable within the larger, primarily commercial WCM market. Following customer success in Switzerland, the product quickly spread to other Western European countries such as France, Germany, and Austria, where Jahia promptly opened sales offices. In 2006, Jahia opened U.S. headquarters in Washington, DC -- a logical choice given the vendor's predilection for government customers. From 2009 to 2014, Jahia focused on continued expansion of its offerings, and experienced moderate organic growth. In 2015, Jahia began to implement an aggressive product and corporate growth plan, and -- while the products benefitted -- the company's aspirations by 2017 had outstripped either its ability/will to grow or its available resources. Product development having never stopped, version 7.3 arrived in October 2018 at the forefront of technical performance in the DX marketplace.

The 2019 *Compass Guide* on Jahia stated that the vendor would "need to focus on expanding its marketing initiatives ... to persuasively position to marketers and other non-technical users a platform whose real forte lies on the technical side." Of what needed to be done to recruit Jahia enthusiasts in marketing departments, the majority has been accomplished with the release of Jahia 8.

Key Recent Developments

The initiatives described as key recent developments in the 2019 *Compass Guide* on Jahia, which were all either in-process or in their first iterations, have now been productized, renamed, and well-integrated into both the Jahia platform and the vendor's longer-term strategy. The C-suite is now full, and mostly based in North America. Last year's "headless/hybrid content & Media Manager offerings" are now jContent. "GraphQL API for microservices-based creation of user experiences across channels" is now part of jExperience. The Unomi-based "Customer Data Hub" is now part of jCustomer, as are more than 250 enterprise application connectors of the type first represented by CommerceIO. Over the past year, Jahia's evolution has significantly related to the linking of data to content – to providing enhanced connectivity between Jahia and external elements of the enterprise marketing stack that underlie omni-channel digital experiences. For this reason, the market would do well to stop thinking of Jahia as primarily for developers.

Profiling the Ideal Buyer

The ideal buyer of Jahia 8 is the technically-adept government organization or large company (particularly in the financial services, insurance, manufacturing, or transportation verticals) seeking either, (1) a DX offering with best-on-the-market technical performance and respectable (and extendable) feature-func-tionality for business users, or (2) a foundational best-of-breed development platform upon which to standardize a range of DX-related initiatives.

- **Large company with complex technical infrastructure and integration requirements**
  Sometimes called "second movers" because they don't prize the cutting edge for its own sake, large companies deeply invested in specific technology stacks must find ways to integrate them. Here, flexibility is the prized commodity.

- **Organizations that prioritize technical capabilities over feature-functional richness**
  A significant number of customers know that product suites bring along with them a host of pre-made technical decisions, implementation complexity, high maintenance costs, and architectural rigidity. These organizations often prefer best-of-breed solutions.

- **Enterprises building their own stacks that seek a unifying development platform**
  Technology buyers are increasingly considering building their own digital marketing stacks. They often seek a core vendor to help them stitch everything together. These are Jahia's likeliest prospects.

Jahia Will Not Be a Good Fit, If...

Customers with a preference for .NET or PHP application development should not consider Jahia. The same holds true for small to midsized companies with modest WCM or DX requirements, and companies of any size without substantial in-house development skills.

WCM and DX technologies are essentially horizontal with respect to vertical industries they serve. That is, no industry-specific criteria would limit a DX platform from being a potential best fit for any given cus-tomer. However, customers in verticals where Jahia has a significant presence (see Page 4) will enjoy greater opportunities for code sharing with Jahia's development community.

DX technology buyers with a preference for soup-to-nuts marketing platforms should probably consider product suites. These offer a wider range of marketing tools, pre-built integrations (usually for other prod-ucts from the same vendor), and more refined user interfaces. They come with higher price tags, longer implementation times, and more resource-intensive maintenance over time.

Key Product Strengths

Jahia 8 particularly excels in evaluative categories important to technologists. The platform in fact ranks first among all platforms tested in the Compass Guides across the technical categories as a whole. Categories in which the platform particularly shines include Flexibility (co-ranked second among all platforms evaluated) and Development Tools (ranked fourth among all platforms evaluated).

The platform also demonstrates extreme modularity, which enables a speed of development that leads the market. Other consequences of API-first-derived modularity include singular integration and customization capabilities, which have led some customers to use Jahia's products not only for their DX functionality, but also as a development platform upon which to base a range of other foundational development projects (frequently headless and omnichannel) essential to improving customer experience.

From a feature-functional perspective, Ars Logica sees the DX and WCM markets as having been led over the past five to six years predominantly by product suites. Concurrent with this leadership – and not visible to many – has been a growing number of delayed, failed, and badly over-budget implementations. The past year has likely witnessed the beginning of an inflection point towards agility and speed. Because of the need to remain competitive in such an era, technology buyers are increasingly (though not yet in the majority) considering enhancing internal technical competencies and building their own stacks.

FIGURE 1   Jahia 8, Key Product Strengths and Limitations

Below are several key product strengths and limitations that potential buyers should keep in mind when assembling vendor shortlists.

KEY STRENGTHS	KEY LIMITATIONS
Outstanding performance across categories of critical importance to technologists (top overall technical ranking among all platforms evaluated)	Breadth of content marketing tools -- offset for some technically-oriented companies by integration capabilities
Excellent architectural flexibility (co-ranked second among all platforms evaluated)	Lack of market share relative to most direct competitors
Robust development tools (ranked fourth among all platforms evaluated)	Revenues under $20 million prevent well-deserved inclusion in some high-profile industry research
Extreme modularity enables market-leading speed of development, integration, and customization	
Omnichannel marketing enablement	

Source: Ars Logica, Inc.

Sources of information: product testing, product updates, customer interviews, vendor questionnaire

They prefer a best-of-breed approach and often seek a core vendor to help them stitch everything to-gether. These are Jahia's likeliest prospects. Well represented among Jahia's installed base are financial services, transportation, and manufacturing companies seeking to protect heavy investments in existing mission-critical technologies by expanding the capabilities of those systems rather than replacing them.

In interviews with Jahia customers, Ars Logica has encountered high, uniform levels of satisfaction. Interviewees were the senior-most technologists at their organizations, which spanned a broad range of vertical industries.

Key Product Limitations

The first limitation of the Jahia platform rests in the breadth of its content marketing tools. Since Jahia never intended to compete for feature-functional parity with the WCM and DX suite vendors, customers who like the hefty tool sets which suite-based platforms provide should look elsewhere. Other customers will say that the suites suffer from "feature bloat." In general, over the past five to six years, non-techni-cal users have commonly opted for DX suites, while IT has tended toward best-of-breed. The trade-off between the two product types is that, while the suites are often complicated to implement, difficult to extend, and inclusive of premade technology decisions, best-of-breed platforms sometimes lack feature-functionality to an extent that leaves marketing asking, "What actually comes in the box?"

Second, Jahia's UI, which the last *Compass Guide* described as "not as refined as the vendors with top rankings in the User Interface & Usability category," has seen major improvement in the Jahia 8 release. Jahia's UI-update plan, which began in v. 7.1 and continued in 7.2 and 7.3, did indeed accelerate in v. 8, as anticipated. A slightly improved score of 6.3 in this area represents a gain on the market, which itself has witnessed significant improvement. While not as high as its ratings for technical users, Jahia's scores for business users of 6.3 to 7.0 are perfectly respectable overall, verging on strong at the upper end.

Frankly, there are no substantial technical limitations in Jahia's platform. Perhaps the most serious draw-back of Jahia as a vendor is its limited market presence relative to competitors, especially in North America. Ars Logica does not see this as a risk for prospective customers. Jahia is well-established. We would only advise prospects to include vetting potential service providers in their selection processes.

Finally, Jahia's 2019 estimated revenues of $18 million are likely the culprit for its exclusion from coverage in some high-profile industry research. Ars Logica believes this is a disservice to the market, as the right fit between technology and a customer may not be much affected by vendor revenues at this level.

Vendor/Product Report Cards

The features, functions, and technical underpinnings of WCM products vary considerably, as do the customer requirements they are intended to satisfy. For this reason, the only reliable way to assure the best product fit for a particular client is to spend anywhere from several weeks to several months assessing the client's specific needs and analyzing product capabilities line by line. Still, Ars Logica is frequently asked to rate products in categories such as those in Figures 2 and 3. In using these ratings, please take care to weight each category in accordance with its importance to your needs. While the average scores across these categories might be the same for two products, proper weighting will likely cause the scores to diverge -- often significantly.

**FIGURE 2** Jahia Report Card for the Business User

Figure 2 shows Ars Logica's rating of Jahia 8 in four WCM categories of critical importance to business users. Refer to Page 11 for an explanation of the evaluation criteria.
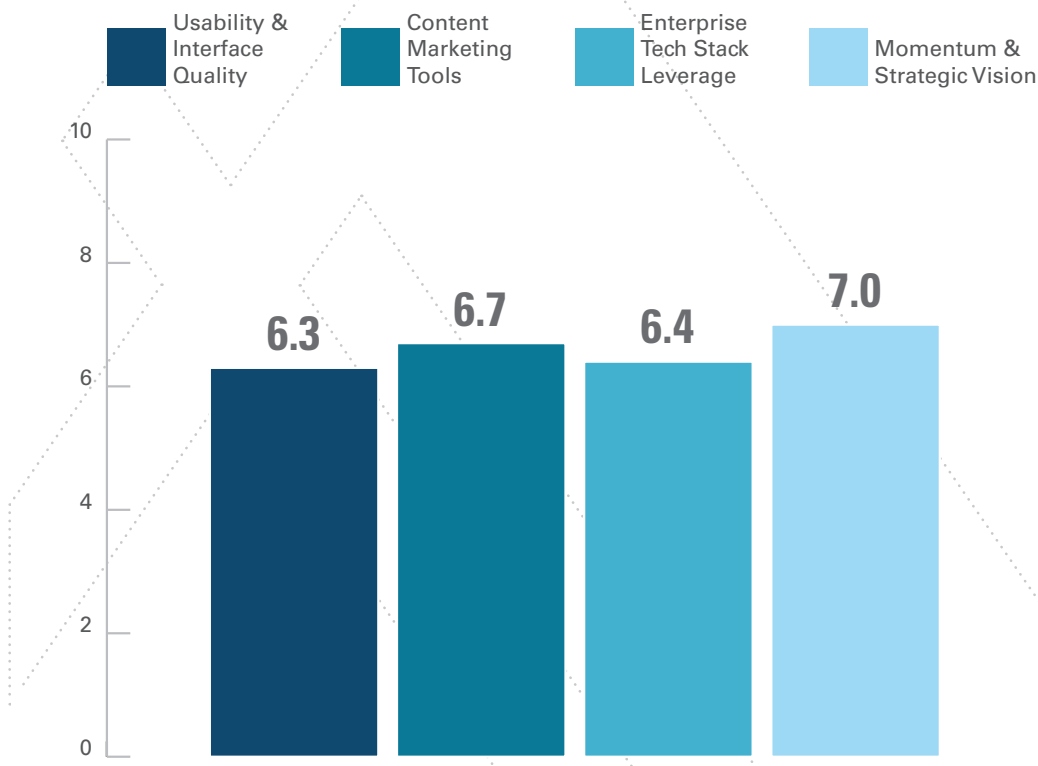
Sources of information: product testing, product updates, customer interviews, vendor questionnaire

FIGURE 3 Jahia Report Card for Technologists

Figure 3 shows Ars Logica's rating of Jahia 8 in four WCM categories of critical importance to technologists. Refer to Page 12 for an explanation of the evaluation criteria.
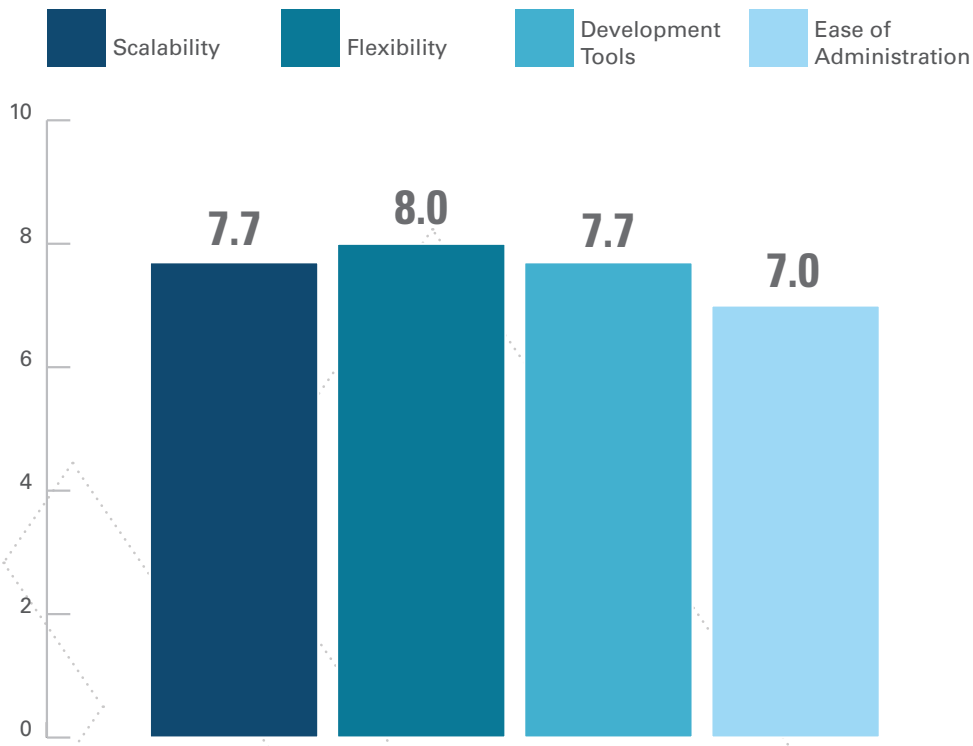
Sources of information: product testing, product updates, customer interviews, vendor questionnaire

Report Card Evaluation Criteria

In the process of analyzing WCM solutions, Ars Logica has established a set of evaluation criteria, which at the highest level can be separated into four categories for non-technical business users and four categories for technologists. Scores in these categories represent averages of a large number of detailed criteria, and are meant to be used as a means of quickly comparing products within the same market segment.

Criteria for Business Users

- **Usability & Interface Quality**
  Usability refers to the relative ease of learning and using a WCM application. For non-technical business users, factors contributing to high scores in this category include intuitive and consistent user interfaces, streamlined task completion (i.e. minimal number of steps to complete a task), integration with the desktop and between product modules, contextual editing capabilities, and documented high user adoption rates among a vendor's customers.

- **Content Marketing Tools**
  Marketers needs tools within WCM platforms to improve sales conversion rates, increase average transaction amounts, draw customers back to their websites, analyze online behavioral patterns, and deliver unique customer experiences. This category rates the presence and quality of such tools, including segmenting, targeting, testing, personalization, site optimization, and mobile support.

- **Enterprise Tech Stack Leverage**
  This category assesses a product's ability to integrate with and leverage the data and functionality of essential enterprise technology platforms such as CRM, ERP, marketing automation, e-commerce, portal, analytics, and social media management.

- **Momentum & Strategic Vision**
  This category represents a combination of a vendor's market momentum (current market share adjusted for acceleration or deceleration over the past 24 months) and the completeness of its market strategy, which includes commitment to technology and implementation partners, meaningful evolution of WCM products, and support for marketing programs.

Criteria for Technologists

- **Scalability**

  Scalability refers to the ability of a product to function well as system demands increase. Factors contributing to scalability are database size, query efficiency, bandwidth consumption, ease of system management, caching efficiency, load balancing, and mass content deployment capabilities.

- **Flexibility**

  Flexibility denotes a product's ability to integrate easily with existing enterprise infrastructure, including operating systems, Web servers, databases, directories, development tools, and other enterprise applications such as ERP, CRM, e-commerce systems, search, portals, and so forth.

- **Development Tools**

  This category describes the quality of a product's integrated development environment (IDE), the technologies that the IDE incorporates, and overall ease of customized application development. Although this category refers primarily to development frameworks, other ad hoc tools are also included, such as page- and site templating, alternate interfaces, scripting tools, configuration utilities, pre-defined coding functions, mobile development accelerators, and any other functionality that enables or eases the installation, development, and customization of WCM implementations.

- **Ease of Administration**

  Some WCM products require significantly more work to administer than others. This category rates the relative resource intensity required to keep the system running smoothly, where higher scores reflect less work. Roughly speaking, higher scores also indicate better coordination of application components due to more methodical system design.

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SERVICES

Advisory Services

Ars Logica is a vendor-neutral analyst firm helping companies evaluate their DX requirements and select appropriate software. To address clients' content management-related questions and problems that arise throughout the year, Ars Logica offers unlimited direct analyst access through its Analyst Anytime advisory services. These annual, subscription-based services provide guidance by phone or e-mail within 24 hours on a wide range of issues. The number of inquiries submitted throughout the year is not limited.

Software and Technology Selection

In our Software and Technology Selection engagements, Ars Logica maps clients' functional, technological, and strategic requirements to potential technology solutions and identifies the software vendors whose products best satisfy these requirements. We maintain a continuously updated comprehensive matrix of the feature-functionality of most DX vendors' products and solutions. We also receive frequent briefings from these vendors and have in-depth conversations and consulting engagements with their customers, ensuring that we always understand the actual state of vendors' offerings as well as their forward-looking strategic directions.

Custom Engagements

Ars Logica's expertise in DX and related technologies such as digital asset management, e-commerce, marketing campaign management, search, and portals, gives us the open-ended ability to help clients on a wide range of projects, including: building internal business cases, assessing technology requirements, analyzing software products and vendors, selecting and assembling software solutions, crafting web strategies, and running corporate educational seminars. We also assist vendors in developing strategic roadmaps, and we and present our view of the DX market at industry conferences and end-user events.

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