



Summary of the BNP CMS and Portal Benchmark Analysis 2006/2007



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1 Facts about the 2006/2007 Benchmark analysis

The independent consulting company BNP has for the fifth consecutive time since August 2000 carried out a comprehensive benchmark analysis of the leading content management systems (CMS) and portal products in the European market.

The BNP CMS and portal benchmark analysis is regarded as unique in a European context and among the most detailed analyses of this specific market.

BNP have selected a number of leading Danish and international CMS and portal vendors to participate in the analysis. In the period of April – July 2006 the vendors have provided a large amount of information about their services and products.

The complete list of participants in the benchmark analysis is enclosed in appendix 1. The total of 38 participants can be categorised into the following groups:

- 26% (10) Closed source Danish/local vendors
- 58% (21) Closed source international vendors
- 18% (8) Open source systems.

Each vendor has specifically answered a RFI (Request for Information) containing 20 pages of questions from BNP. This way BNP has gained a very good insight into the strengths and weaknesses of each product and vendor. A consequent methodology behind the analysis has furthermore made the answers directly comparative. This has enabled BNP to identify the specific systems that represent best practice within various criteria.

The main criteria behind the benchmark analysis are the following:

- Communities
- Partner Support
- Architecture
- Integration
- Developing environment
- Security
- Customisation
- Out-of-the-Box functionalities
- Workflow
- Usability
- Search
- Personalisation
- Third party development
- Standards
- Inline editing
- Localisation

More than 14.000 pages of answers to the questions in the RFI including documentation has now been analysed by BNP. As in previous years BNP has written this summary containing conclusions and CMS trends in the Danish/Nordic and European market.

As a new feature this year, BNP has identified vendors displaying exceptional functionality and thereby represents best practice within 15 important categories. The award winners will be published on 21st. November 2006 at the BNP CMS Best Practice seminar in Copenhagen.

2 Selected conclusions

First of all BNP has noticed how the major software companies such as Microsoft, IBM, Oracle, SAP, etc. increasingly are penetrating the CMS and portal market, a niche market that used to be owned by relatively small specialised vendors. They now offer their own products and grow into this specific market by mergers and acquisitions. IBM has for example just bought FileNet and the next obvious target could be Day because of the close connections between the two small companies.

At the same time though the 2006/2007 benchmark analysis also shows that the largest it-companies have huge difficulties in competing with the small, dedicated CMS vendors when it comes to efficient client communication. They can not offer the rapid possibility for clients to get in touch with members of staff with deep product knowledge. In fact none of the major companies were capable of answering the BNP Benchmark RFI in a satisfactory manner. Something the small and medium sized vendors made a virtue of doing as comprehensively as possible.

In other words there is a fundamental consideration for future buyers of CMS and portals to make. Because it makes a big difference to be a small, "one out of many" client at a large vendor compared to being a large, influential client at a small CMS company. The pros and cons, advantages and disadvantages of both scenarios must be considered seriously before buying a system.

2.1 Ten main tendencies

BNP has through the latest benchmark analysis identified the following ten main tendencies within the CMS and portal market since last years 2005 Benchmark analysis. BNP consider these tendencies as being essential for the future development within the CMS and portal world.

2.1.1 New business models are breaking through

It is clear that building relations to developers and clients has become the main focus in creating value in many CMS companies. This development away from just focusing on the product and selling licences is interesting. Most leading CMS companies now focus on establishing a strong environment for developers that effectively can support their CMS and portal platforms.

The open source CMS business models are in essence a prime example of what networking and productive relationship creation is all about. Here different developers and clients are developing the platform together with real and actual needs as the point of departure.

On this basis BNP believe that the open source CMS vendors which have the right focus on coordinating an effort to establish a professional environment are increasingly becoming serious competitors on the global CMS market.

BNP also expect that the open source business models soon will have a large influence on the commercial closed source vendors. These will eventually be forced to offer free versions of their systems to the market and to a much higher degree involve developers and partners in further development of their platforms.

Competition on the CMS market also can be expected to increase rapidly when a large number of open source CMS in the near future is going to be developed for the MS .net platform. A platform many companies now have gained expertise within.

At the same time it has to be noticed that several open source CMS organisations are using new business models in order to secure that developers are able to sell specially developed modules on their platform to a wide audience. This is arranged in such a way that developers outside their network can not copy the modules and sell them to their own clients.

In this way these open source CMS organisations are trying to copy traditional business models when it comes to a strict focus on product sales, and still they keep their open source status.

An outline of drastic future market changes in both open source CMS and commercial closed source CMS is becoming visible. In the coming years new business models will develop and buyers of CMS has to comprehend them when they plan which CMS solution and service partner that suits them best.

2.1.2 New user interfaces

Basically significant things have happened when it comes to development of user interfaces since last year's benchmark analysis. Now AJAX (Asynchronous JavaScript and XML) is being used in a distinct degree. This means that the user interfaces are being perceived like ordinary client applications. Now in 2006 AJAX based applications technology are more widespread than the actual client applications. Those applications have been quite a nightmare to maintain on the different operating systems for many CMS vendors.

The CMS user interfaces are now becoming increasingly similar to the common Microsoft user interfaces and it is clear that this has been a focus area both for securing sales and enhancing usability.

CMS users are also feeling safer in the MS environment that they otherwise work within on an everyday basis. Unfortunately the general CMS usability level has not been developed much, usually the surface has just been given a little brush up.

The developing tools tend to become rather advanced. Both when it comes to integrating data from other applications and putting together the different design templates. This means that the most advanced systems now possess built-in integration dedicated applications. At the same time, some of the simpler CMS are also offering similar applications.

From the buyers perspective the need for using these inherent integration tools is limited. And many dedicated developers prefer solid integration to third party developing tools instead of developing directly in an online tool.

BNP is confident that WebDAV (Web-based Distributed Authoring and Versioning) as a technology is gaining ground both with integration of developing tools and with production of content to CMS. There is therefore a tendency in the direction of more and more content now being produced completely independent of CMS. Instead content is entering the system through WebDAV.

Through the consulting task of uncovering needs in client organisations BNP has observed that many users for usability reasons prefers to use the classical document model instead of having to enter the CMS itself. This finding though is most evident for companies that have organised a strict split up between production and publication of web content.

2.1.3 Usability

Surprisingly few of the 38 participants in the 2006 BNP benchmark analysis were able to substantiate that they are making use of systematically usability tests of their products.

It is disappointing for BNP to observe that this important area has such low priority among vendors. Especially as the CMS buyers are ranking proven usability high in their demands. Unfortunately it is a common problem that a low degree of usability is difficult to spot at first glance in a buying situation. Many vendors have a tendency to just improve usability in the upper graphical layer instead of making a substantial effort into evaluating the users' interaction with the CMS.

It has to be noticed though that the vendors in general have improved in listening to user needs. Even in the case of vendors having a partner's only strategy needs and wishes from the clients are coming through to the developers of the vendor faster than before. The main reasons for this improvement is the increasing number of user communities and the fact that partners on an ongoing basis are able efficiently to report bugs in the user interfaces through partner extranets.

In general much more attention is paid to the details in the user interface.

The user interfaces are, as mentioned before, usually very similar to the user interfaces of Microsoft. Even within the open source CMS community MS lookalike interfaces are beginning to break through and becoming common.

Among most vendors it is still a problem that standards are not being produced for further development. BNP also find that quality control is not sufficiently strict. It is a widespread problem that core functionality and especially module functionality are containing interfaces that do not correspond with the rest of the system. This can give the user an impression of the product as not being fully developed. Then again smart salesmen can easily cover this problem in the sales situation and therefore a solution to this problem is not given much priority among the vendors.

Generally the support of the authoring/writing process for the editors has not been improved significantly within the last year. This represents a future potential for the product development departments.

There is also a lack of focus when it comes to support systems directed towards the general use of CMS. Context specific help functions are still missing in many leading CMS and their modules. This could be explained by the non-existing development standards for user interfaces.

2.1.4 User statistics are becoming business critical

In 2006 the established CMS are being driven forward by user statistics. Vendors are clearly allocating resources to developing tools for analysing user traffic patterns such as where they are coming from, what content they go looking for, what they read and do not read, etc.

User statistics as such is nothing new. It is the way they are being used actively nowadays as a tool for optimising content in a CMS that is remarkable.

This development is obviously reflecting how the website has become the primary communication channel and how e-commerce today has much higher attention than just a few years ago. These two areas are in 2006 considered as being business critical among most professional enterprises.

Through many leading CMS it is now possible to deliver targeted messages to selected customer segments and afterwards evaluate which specific messages that statistically generated interest. Thereby both content managers and Marcom staff are receiving important and very accurate information about user behaviour.

2.1.5 Internationalisation

Most leading CMS-products are rapidly moving towards support of so called localisation and mutualisation of content. This means that the systems in a very efficient manner are able to manage content in several languages, several versions and in several contexts. For the vendors it has been quite a challenge to develop such functionality. First of all it is

difficult to find the right balance between effective and controlled quality control of content, especially, when other important factors as usability and simplicity also need to be considered. The vendors are coping with this challenge in many different ways. And as a result of this many different solutions are provided. Everything from the highly integrated to the simple, manual solutions is marketed.

Furthermore the organisation of each CMS buyer poses their own specific needs to control content when it comes to localisation and mutualisation. Some CMS buying organisations also have certain quality standards to be met. And thus relatively tight demands towards controlling content in different contexts. Then again other buyers of CMS are more focused on flexibility and giving responsibility to as many local editors as possible.

All in all it is difficult for the vendors to produce a general CMS solution that suits all the needs of all clients. This fact also troubles product development. The sales strategy with a natural aim of attracting as many customers as possible with a standard solution, often means that the small or highly specialised clients get squeezed.

2.1.6 1-2-3 – Website

Recently the market has witnessed the occurrence of different standard CMS solutions for websites that do not need to be integrated with other systems. In a relatively simple manner they can be configured towards design by ordinary webmasters. Such rapidly created and CMS based websites are called 1-2-3 websites. More and more CMS vendors are including these "quick and dirty" solutions in their product portfolio. Either they are developed by the vendor or by partners. The functions of these types of quick CMS solutions are for example:

- A way for the large CMS vendors to reach down and appeal to the lower parts of the market. In these market segments their complex and extensive systems normally are overkill. But by offering 1-2-3 websites the vendors hope that small clients can develop into larger clients. Through time new needs occurs and upgrading to larger customised solutions then can become realistic even for a small business
- A way in which companies organically can develop a dynamic intranet in order to let project groups and departments create websites to be configured according to individual needs. Each organisation then can give rights to let design and functionality be customised by web editors without any technical skills.

BNP predicts that the market will see more and more of this type of 1-2-3 CMS solutions. And within the near future for example Google will probably introduce a free CMS of this kind.

2.1.7 Electronic forms and digital signature

CMS modules containing useful electronic forms have not been developed as rapidly as BNP had predicted. Surely the main reason is that the vendors have been too busy developing their products within other areas.

Another reason is that the CMS buyers neither have focused much on optimising their business processes by integrating electronic forms in a CMS.

Today a business case would still not be positive for most vendors who try to develop a generic solution with electronic forms in a CMS. But that might change shortly as the major advantage of including electronic forms becomes known to a wider audience than today.

Until then the traditional providers of dedicated electronic forms solutions can safely keep this lucrative market for themselves. The coming years will show though if these specialised electronic form providers choose to form partnerships with CMS vendors with the aim of offering integrated solutions or they will try to enter the CMS market on their own.

2.1.8 Client demands and vendor competences

An increasingly divided market can be observed concerning development of functionalities to CMS. For BNP it is clear that most vendors wisely are avoiding development of functionalities only relevant to a few clients. That is because of difficulties in selling these functionalities with limited relevance to other clients. For instance document management, search engines, and other technologies which needs focused and continuous development to satisfy the evolving needs and demands of the customers. Probably it does not come as a surprise that especially the small vendors keep away from these development projects.

The large vendors will most likely continue to use mergers and acquisitions as the strategy to be able to offer many different types of applications in a single package solution.

For BNP the CMS market has surprisingly few standard integrations solutions to other established applications to offer today. This is either because of the fact that development concerning integration typically is made up only by a few partners or because of the fact that there is simply no basis for developing standard integration to other CMS/ERP/DM applications.

Finally there are still application areas where vendors are buying up other companies in order to complement their own areas in better ways. That was probably the reason why Hummingbird bought Reddot. This is not yet common practice in a Nordic/Scandinavian context though.

2.1.9 Standard solutions

Standard solutions are typically to be found in companies with strong IT departments controlling its web solutions. In these companies daily operations and the running of the solutions are typically in focus. It is important be able to refer inexpedient behaviour of future solutions to the vendor. This way an accusation of bad internal planning or project management is proactively avoided.

Another type of projects in which standard solutions often are chosen is in connection with mergers. Here it is often considered as an advantage that systems are relatively fixed. Then democracy and internal consensus efforts will not slow down implementation projects. If the limitations of the technology constitute the future solution instead of letting the awkward users speak, you have found the fast and easy way to manage a merger project.

Finally BNP can observe that a major argument for choosing a standard solution is negative experiences with specially adjusted solutions in the past Those experiences often include both development and maintenance.

Many systems in the middle range CMS class still have functional problems on advanced infrastructures with for example SAN and distributed servers.

Basically there can be several good reasons for choosing standard solutions. But quite often the modules and the functionality available at first hand are selected by buyers instead of analysing the CMS market thoroughly to begin with. The users are rarely involved much in this selection process. There is simply no tradition for identifying best practice among CMS buyers before the purchase. This fact makes the selection process faster, saves resources else used to survey the market and involve the users. But this does not provide the employees with the best tools.

2.1.10 Adjusted solutions on a black box

Gradually many companies have reached at state where they do not want to continue developing their CMS solutions internally. These companies are now considering buying a black box solution with better support to the end users than to the internal IT developers.

The CMS buyers that do not pay enough attention to the technology and the platform behind their CMS will experience difficulties in changing strategy in case they want to take over the development of their solution. At the same time, there is a tendency towards that companies buying a black box solution have become better at judging the business conditions connected to this specific setup. For instance whether there is a minimum of service partners on the market to secure healthy competition and the possibility of using different partners for different types of services instead of being dependent on just one.

A common problem when a black box solution has been chosen is lack of resources during development on vendor side. It can also be a problem for the customer to judge whether the consultant allocated to the project by the vendor possess the required skills and experience. This eventual lack of competences is actually one of the major risks when purchasing external consultants. In other words the developer still makes a big difference.

In general BNP consider it as a main conclusion that buyers of black box solutions are more user oriented and often also more business oriented than buyers of standard solutions.

2.2 Development tendencies within the 15 main criteria

Underneath the development tendencies are described within the 15 main criteria that BNP is evaluating the vendors on. The tendencies are deduced as a comparison to the results of the previous benchmark analysis 2005.

2.2.1 Communities

Basically communities are used to support buyers of CMS. Vendors, partners, service partners, etc. are now using communities to support their clients. Yet CMS communities are increasingly being used to report bugs and facilitating dialogue about inexpedient functionalities in more or less structured forms.

BNP finds that there is a huge difference between the openness of the different communities in comparison to the different CMS products. On the open source CMS market communities are usually completely open and accessible to both clients and partners. Whereas the commercial closed source CMS communities rather is a mixture of both closed and open communities supported by the vendor. Yet in this last-mentioned category the majority of communities are closed for non clients.

Communities are traditionally connected to the open source world and have played a large part in its recent success. This fact has recently been discovered by the commercial closed source vendors who can see the value by having such a network. Unfortunately it is still difficult to start up and maintain an active and vital community based on a commercial closed source CMS. The reason for this is that the developers and partners are used to keep their business secrets very confidential. It is difficult in suddenly to be very open about the very same secrets.

CMS communities are to be considered as marketing channels which is not necessarily negative for the end clients. The new CMS communities are on the contrary efficient means to strengthen competences and knowledge sharing among the different partners and stakeholders.

Communities also represents a challenge in finding the right balance for CMS vendors between giving support and not becoming competitors to their partners by entering their specific business areas.

BNP have observed that the companies which are seriously giving priority to forming an active community also are spending a lot of resources on maintaining it and giving it strategic focus by using it as a unique selling point.

2.2.2 Support of partners

Focus on support of partners has become increasingly important. It is clear that the CMS vendors consider support as a strong tool for creating close relations to their partners. In the competition for attractive competent partners skills development and continuous update of know-how of partners are important factors. This is because of affiliation to competent partners are becoming one of the most important sales arguments when selling CMS.

There are many advantages in a well-developed cooperation between CMS vendors and partners:

- Partners are getting the possibility for ongoing bug reporting which enables the vendor to react quickly to urgent client needs
- CMS vendors are getting the possibility for offering efficient support to its partners concerning final code, techniques and modules causing greater customer satisfaction
- CMS vendors can offer better sales support tools to their partners and thereby increase sales of their own solutions. For example by offering professional brochures for download to partners who then do not have to waste time on producing marketing materials by themselves
- The CMS vendor can arrange seminars or courses and offer certifications to a very well defined target group

Within the open source CMS world it has become standard to offer a wide range of well written documents that developers can use to convince their boss about the great deal of sense it makes to make use of a certain CMS platform ("How to sell this CMS to your boss").

2.2.3 Architecture

Architecture is still among the most central criteria when a company is about to buy a CMS with the intention of using it as a development platform. Architecture is in focus if there are certain conditions and demands within the company to be addressed, for example on performance and integration. In that case it is central that the architecture is carefully prepared, stable, tested, and proven.

No significant improvements have been made on CMS architecture through the last year. The basic condition for survival among the partner oriented CMS vendors is to deliver a broad, solid, and well proven API (Application Program Interface) that secures the best possible starting point for partners to developing modules. The challenge in this setup is to be able to integrate and develop external modules in a flexible manner to let the CMS buying companies easily use these modules.

Neither within database structures there has been made any significant improvements to track in the CMS world since 2005. Most companies have consolidated their data structures and are now more focused on determine a range of formats to enable data interchange between different applications.

Another tendency that BNP have noted is that the goal of architecture is no longer just a question of creating the most generic structure and architecture which easily can become boundless. Now it is rather a question of finding the right balance between the general structure and the clarity/usability for developers.

2.2.4 Integration

The most advanced CMS on the market nowadays has built-in integration applications. Even some of the simpler systems are trying to include such functionality. For an up-to-date CMS it is clearly important to be able to integrate to the most common applications like portals and ERP systems. Unfortunately BNP can observe that there are still surprisingly few actual cases to be found that includes standard integrations and such cases are especially absent within the open source CMS environment.

When it comes to SOA (service oriented architecture) most service partners are offering web services but only few standard packages from the CMS vendors are still to be found in this area. This is the situation despite of the fact that it should be quite easy for CMS vendors to offer ready-made web services as they already have a fully documented API. But within the coming years BNP predicts a continued focus on web services under SOA both from the buying side of the table and from vendors.

2.2.5 Development environment

Despite the fact that many developers prefers to develop in third party developers packages such as Visual Studio there is still relatively good support in many CMS. Thereby new front-end designs can quickly be developed. It is possible even with a minimum of programming knowledge to amend the different templates. Many system vendors are today trying to create an easier development model than seen before.

2.2.6 Security

In general security on a protocol level is not a focus area any longer. That is something which most system vendors have sorted out by now. Instead attention is now on giving users a better overview of users/editors that have permission to access certain content areas. This area used to have low priority.

Other important security related areas as for example the granularity of control and transparency of the assigned rights are playing an increasingly important role in the most streamlined and efficient solutions.

It is now a clear demand to CMS that they can integrate to AD/LDAP. At implementation of large solutions it is also important to be able to collect data in AD/LDAP. For example to phone books, access to extranets, etc.

2.2.7 Customisation

Generally there are many options for customisation on front-end in most CMS. That means adjusting each solution to own personal needs. Each single module can gradually be configured in many ways at the front-end. The service partners are also offering a lot of their standard modules with an open source code so they can be modified to meet the many unique needs that exist within a wide customer segment.

Through the last years focus has increased on customisation of the administrative part of the CMS solutions. And at the same time the basic models in the user interface has been retained. This has been quite a challenge concerning architecture and user interfaces. The balance between securing the quality in the user interface in the product and at the same time give developers the freedom to integrate effectively to other systems in order to support working processes has clearly been difficult to find for the CMS world.

The largest successes to be seen among CMS vendors is often based on framework for what the developers are allowed to do, including the developers at service partners who works directly for their clients. In the long term there is no doubt about that the winning CMS of the future will be among those which are first movers in getting the customisation issue solved with definitions of guidelines and out-of-the-box functionality.

2.2.8 Out-of-the-Box functionality

Surprisingly few news has been seen within the last year in this area. BNP had expected the vendors to cooperate with their partners in presenting far more marketplaces, catalogues over developed modules, than what has been the case.

BNP consider the major reason for this to be that many CMS still being relatively locally based. There is simply not a global market large enough to only sell modules. Unfortunately this also represents a reason for the slow internationalisation of many highly skilled CMS companies.

At the same time customisation of the administrative part is still not standardized enough to be fully applicable for third party vendors.

2.2.9 Workflow

Since 2005 the advanced CMS workflows have been on a retreat compared to new focus on decentralisation of content administration by

the CMS buying organisations. In 2006 the vendors have met customer demand for very simple workflows. Simple workflows have in return become much more user friendly, clear, and easy to customise.

This demand has to some extent been met by the vendors. There has definitely been more focus on a distinct control centre in which all the different tasks has been assembled at one spot. This takes place in a sort of easy well-arranged CMS mini portal that can provide the editor with a good overview of the state of different content on his/hers websites. With such a mini portal, attention can be kept on the quality of content.

BNP has noted a tendency towards some clients that integrates their CMS deeply into back-end systems and this leads to a growing need for using advanced workflow systems. As a consequence many CMS now include both a "lightweight workflow system" as well as more advanced workflow system that supports quality control procedures, etc.

Most global companies though have started to request tools to the support of localisation by which it meant support of different versions of the same content. This is especially used for product catalogues and news.

2.2.10 Usability

Usability has again become one of the most important CMS issues.

There is a general orientation towards the Microsoft user interfaces as they look like in Sharepoint Portal Server and Windows XP. BNP though also meets interfaces in modules that are not being updated continually, and content therefore is lacking in consistency and quality. This gives the editors a hard time.

AJAX is getting more and more popular, but it is mostly the small CMS vendors that have been front runners in adopting the new technologies. The large CMS vendors have not to same extent given priority to this part of their products.

It is still very unusual for BNP too see a systematic evaluation of the user interfaces by the CMS vendors. They are simply not able to prove that they include such an approach to product development.

Among most open source CMS organisations and a few closed source commercial CMS vendors there is a certain strategy followed. They correct the bugs and inexpedient parts of the user interfaces that most clients complain about before implementing anything else that also could be relevant. That is a good way to efficient product development if the CMS vendor posses the right concept. Yet this systematically approach to product development is not going to cause a revolution. More drastic changes of the product will require a dedicated and concentrated effort.

2.2.11 Search

Search functionality is no longer something CMS vendors are trying to make one of the cruces in their systems. Instead attention has been on giving clients as many options as possible in choosing:

- Which search engine to buy
- How it can be configured
- Possibilities for use - apart from CMS

The clients are in reality beginning to realise which value they could get with an effective internal search engines. They also know which challenges they need to address concerning technology and their organisation.

At the same time as the CMS buyers are becoming conscious about which possibilities that the search engines are providing new needs arise in using these actively on different websites.

This also means that resources and budgets are being released for acquiring flexible search engines that can create associations to different content parts and present relevant content for the users.

2.2.12 Personalisation

Personalisation is traditionally connected to the core functionality of portal systems. BNP sees that portal vendors still have difficulties understanding the traditional Web CMS world. As a result of this, many clients are often left frustrated with partly useless tools once the portal is implemented.

In similar ways many clients have also experienced that a total solution in which a CMS and a portal system were supposed to work together in harmony have been quite problematic. User interfaces are often different and the interaction between the products is also problematic. To begin with, there are no apparent interfaces as between CMS and search engines. Then there is a great deal of overlapping functionalities between portals and CMS like on rights and information structure. Therefore problems arise about which application that posses the overall responsibility for the different parts.

Because of this problem the CMS vendors have had success with introducing relatively simple but functional portals which exactly provide a connection between the different types of functionality. Unfortunately these kinds of portals are still lacking possibilities for advanced personalisation.

The purely portal focused systems though are increasingly becoming good at supporting the possibility for composing information intelligently. And they do that much better than pure CMS solutions.

It is going to be interesting to see weather or not the leading portal systems within the coming year will be able to integrate solid CMS functionalities in their solutions.

2.2.13 Focus on third party development

There has not as expected by BNP been much attention towards third party development from CMS buyers. It was expected that a range of functionality specific companies would enter the market, but the CMS vendors have apparently not given much priority to this area in their business plans.

Within open source CMS this market though have been prospering. But quite a few system vendors are fighting to improve their business models in order to make them match to the more profitable commercial CMS market. There is simply a need to find a new model that leaves space to both open source development and different degrees of closed source development.

In general, there are no new tendencies to observe in the third party development area. It has not moved much since the last benchmark analysis in 2005.

2.2.14 Standards

Standards are a broad subject. It is mainly customer demand that sets the pace for resources allocated to development of standards in different CMS.

Generally it is the government organisations that are mostly focused on the web standards and to what extent the systems are able to support these. This is mainly because of strict public requirements towards this area and a considerable focus on profiling the efforts of each institution on the digital field. An example is Bedst på Nettet (best public website) in Denmark (www.bedstpaanettet.dk).

XML is used to the same extent as before. System vendors have become increasingly focused on producing code that meet XHTML 1.0/1.1. Cascading Style Sheets are now used widespread in CMS solutions. It is clear that service partners have gained experience with CSS 2 solutions that also supports several accessibility standards.

In the summer of 2006 accessibility standards have gone from WCAG 1.0 to WCAG 2.0. Which is such short time that vendors have not yet had a fair chance to react on this. But probably this slight revision concerning accessibility standards will not affect product development much.

2.2.15 Localisation

For most companies it has become very important to control their web content in several locations. Because then they can monitor and actively work with different local:

- Markets
- Target groups
- Cultures
- Languages

Just within the four above mentioned dimensions content can as a minimum potentially mutate to a variety of the same content. This creates increased requirements towards supporting the lifecycle and coordination between the different editors and translators.

While the systems has become much better at supporting different versions it is still a major challenge to support cooperation and notification under the content preparation and publication process. This is not just because complexity needs to be balanced with usability. The different customer types also have different demands dependent on whether or not attention is on centralised or decentralised control of content.

Through the next couple of years the market will probably see CMS containing standard functionality which in a more satisfying manner will support exactly this requirement.

3 About BNP

BNP Consulting Limited was established in 2000 as the first independent Danish IT and management consultancy firm specialised in impartial advice on the selection of web content management systems, intranet systems and enterprise portals.

BNP is widely considered as *the* impartial CMS advisor in Denmark. Once a year BNP evaluates and benchmarks the systems of the leading national- and global CMS vendors. The BNP CMS and Portal Benchmark analysis is unique regarded in a European context and among the most detailed analyses of this specific market. After 6 years of monitoring the CMS market BNP know in detail about the strengths and weaknesses of each CMS.

All employees of BNP are highly experienced IT- and management consultants holding masters degrees from Danish universities or business schools. Through the last 6 years staffs from BNP have been acting as a strategic advisor for a long list of large, mainly Nordic, companies as well as for major government/public organisations. Typical BNP services include digital strategy, business cases, project planning, need analyses, process analyses, requirement specification, project management, and selection of tenders and vendor.

As Web projects becomes increasingly complex today the CMS projects of BNP often includes issues within integration of document management, knowledge management, ERP, CRM, search engines, electronic forms and web services/SOA.

Appendix 1: List of participants

The following 38 selected vendors of CMS and portal products participated in the BNP CMS and Portal Benchmark Analysis 2006/2007:

Vendor	Content Management System	Open Source	DK based	MS .NET	J2EE/Other
Synkron	Synkron Via		✓	✓	
Sitecore	Sitecore CMS		✓	✓	
Tangora Software	Tangora Portal CMS		✓		
Dynamic Web Software	Dynamic Web Composite		✓	✓	
Web500	Web500		✓	✓	
IntraNote	IntraNote Suite		✓	✓	
Webtop Technology	WebtopONE Suite		✓	✓	
2ndfloor	Siteloom		✓	✓	
Headnet	Zitewriter	✓	✓		✓
Umbraco Team	Umbraco	✓		✓	
Magenta	Obvius	✓	✓		
EMC	Documentum				✓
Escenic	Escenic Content System				
Fatwire Software	FatWire Content Server				✓
Oracle	Oracle Portal				✓
Percussion Software	Rhythmyx			✓	
Reddot Solutions	Red Dot CMS				
Roxen Internet Software	Roxen CMS				✓
Microsoft	MCMS / SPS 2007			✓	
Stellent	Stellent Universal Content Management				✓
Interwoven	Teamsite				✓
Tridion	Tridion R5			✓	✓
Hummingbird	Hummingbird Enterprise				✓
Drupal Team	Drupal	✓			✓
eZ Systems	eZpublish	✓			✓
Plone Team	Plone	✓			✓
FileNet	Site Publisher				✓
Day Software	Communiqué				✓
IBM	Workplace WCM				✓
Mediasurface	Mediasurface				✓
Open Text	Livelink WCM Server				✓
CoreMedia	CoreMedia CMS 2005				✓
EpiServer	EPIserver			✓	✓

SAP
Zope Team
Typo3 Team
Bysted

SAP Portal
Zope
Typo3
Global Site

