

MARCH 27, 2019

# Compass Guide to WCM, Q1 2019

## Evaluation of Jahia Digital Experience Manager 7.3

**By:** Tony White



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# Jahia Digital Experience Manager 7.3 Product Evaluation

**By:** Tony White

**Date:** March 27, 2019

## ARS LOGICA

## ARS LOGICA POSITION

Jahia DXM 7.3 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 DXM.

## 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.

### Customer Interviews

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

### 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.

## Jahia Vendor Overview

Jahia is a small Swiss-based DX vendor founded as a software company in 2002. Early on, Jahia began to focus primarily on the government sector, but its clients now include companies across a wide range of verticals, including consumer brands, education, financial services, government, hospitality, insurance, manufacturing, and technology. The vendor targets 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 DXM 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): 70  
Geographies: Europe and North America  
Revenue: \$15 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 Digital Experience Manager  
Version: 7.3  
Next version release date: Q4 2019  
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

Founded in 2002 in Geneva, Switzerland, as a software company (not a professional services firm, as were the majority of DX vendors), 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.

Because of the product's technical strengths, Jahia will not face growth limitations on this front, but the vendor will need to focus on expanding its marketing initiatives. This specifically translates into creating a go-to-market strategy that persuasively positions to marketers and other non-technical users a platform whose real forte lies on the technical side.

## Key Recent Developments

Starting with the top-down management reorganization in Q4 2017, key recent developments from a corporate perspective largely relate to the retention of key technical talent (mostly successful), C-suite recruitment (about two-thirds complete), strengthening teams in specific geographies (UK, US, France), and implementing an effective best-of-breed partner strategy. On the product side, the most noteworthy developments include: (1) headless/hybrid Content & Media Manager offerings that make personalized, in-context scenarios possible; (2) GraphQL API for microservices-based creation of user experiences across channels; (3) Customer Data Hub, an Apache Unomi-based customer data platform with accompanying Jahia enterprise-service subscription; (4) CommerceIO (first release is for SAP Hybris), a developer toolkit that reduces the integration complexity of combining information in product catalogs with content in Jahia DXM; and (5) Elasticsearch, for improved customer experience optimization.

## Profiling the Ideal Buyer

The ideal buyer of Jahia DXM 7.3 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-functionality 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 mid-sized 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 customer. 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 products 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 DXM 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 Digital Experience Manager 7.3, 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)	UI not as refined as top competitors' (priority on roadmap for Q4 2019 release)
Robust development tools (ranked fourth among all platforms evaluated)	Lack of market share relative to most direct competitors
Extreme modularity enables market-leading speed of development, integration, and customization	Revenues under \$20 million prevent well-deserved inclusion in some high-profile industry research
High customer satisfaction levels	

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 together. 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-technical 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 user interface is not as refined as the vendors with top rankings in the User Interface & Usability category. Jahia has focused since 2015 on technical aspects of the platform. To compensate, an incremental rollout of Jahia's UI-update plan which began in v. 7.1 has continued in 7.2 and 7.3, with an acceleration anticipated in the Q4 2019 release. That said, a score of 6.2 in this category is respectable, as are scores across the business categories ranging from 6.0 to 6.7. Furthermore, the platform actually *does* provide functionality in most of the areas described in the synopsis of the "Content Marketing Tools" category (see Page 11). Jahia's score is currently suppressed not so much by underlying technical limitations, but rather by how the lack of an analytics and reporting UI affects business users.

Frankly, there are no substantial technical limitations in Jahia's platform. Perhaps the most serious drawback 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 2018 revenues of less than \$20 million exclude it from coverage in some high-profile industry research (Gartner has its changed inclusion criteria). 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.

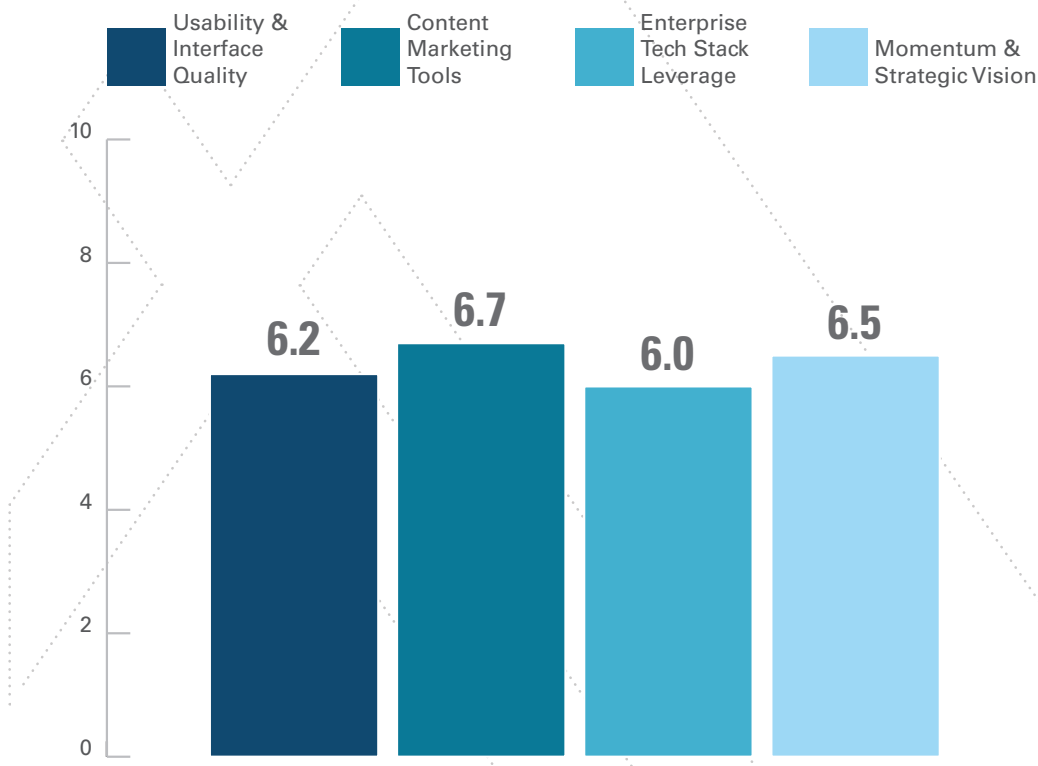


## Vendor/Product Report Cards

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

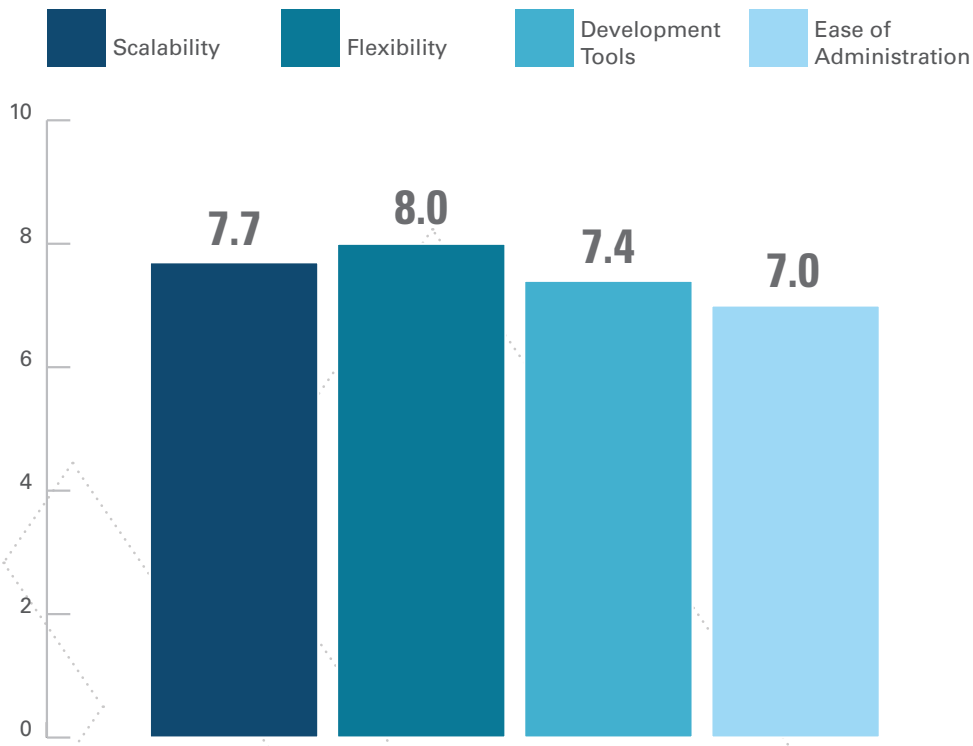
**Figure 2 shows Ars Logica's rating of Jahia DXM 7.3 in four WCM categories of critical importance to business users. Refer to Page 11 for an explanation of the evaluation criteria.**



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 DXM 7.3 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 need 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.



## 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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