

WINTERGREEN RESEARCH, INC.

**Worldwide Business Process Management (BPM) Market
Opportunities, Strategies, and Forecasts, 2009 to 2015**

Business Process Management (BPM)



Picture by Susie Eustis

MOUNTAINS OF OPPORTUNITY

**WinterGreen Research, Inc.
Lexington, Massachusetts**

www.wintergreenresearch.com

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CHECK OUT THESE KEY TOPICS

Business Process Management BPM

BAM

BPMS

Business Process Management Market Shares

Business Process Management Market Forecasts

BPM CRM Business Process Change Building

BPM Cloud Technology

Blogging

Web 2.0 Design Patterns

Wiki-Style Collaboration

Social Networking

Business Process Management Market Driving Forces

Greater Value From Existing Assets

BPM Web Services

BPM Multiple Process Categories

Business Process Management technology

BPM Software Process Design

Service Level Challenges

BPM Products

BPM Analytics

Web Services

SOA

OPPORTUNITY ABOUND

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Shares, Market Strategies, and Market Forecasts,
2009-2015**

WinterGreen Research 2009 study on business process management markets has 609 pages, 211 tables and figures. The cost is \$3,400 for a single copy, \$6,800 for a web site posting. Systems are poised for significant growth as Web based applications are used to implement automated process. A business process management system has many aspects related to a range of industries moving to leverage the Internet as a channel.

Real time analysis of information is being used to position companies to achieve competitive advantage. Cloud computing is a central aspect of the BPM initiative, providing up to date information in a usable format. Companies are implementing BPM solutions in the context of cloud computing that provides syntax to business users.

The BPM syntax is used in a model driven architecture at the line of business. This comes from an engine that is worked on all year long by IT. In this way, business analysts have access to BPM models that run without coding. Scalability and enterprise wide solution sets are achieving significant competitive advantage and improvements in productivity. Response to competition means adjusting unique enterprise resources to address opportunities and respond to change in markets. Needs and demands are integral to an integration infrastructure systems implementation.

According to Susan Eustis, lead author of the study, "innovation drives market growth in every industry, and innovation depends on implementation of automated business process in every instance. IBM, Oracle, and Adobe are among market leaders. IBM is able to leverage its SOA market dominance to support innovation, providing software that supports flexible response to changing market conditions." SOA reaches into every industry and every segment of the economy. SOA drives innovation for the very large enterprises, now the mid range size companies and very small organizations are adopting technologies similar to what the enterprise use, creating automated process to replace manual process.

Business process management promises to drive enterprise markets going forward by implementing automated process more efficiently. Automation of business process must be balanced with human exception management, which is managed by workflow. Business processes are enhanced by the ability to interconnect a range of different applications systems including general ledger, order entry, inventory, process control, and human resources.

Integration of Internet servers that implement e-business with partners and open a new sales channel depend on BPM systems. Areas of demand within the enterprise include financial services, customer relationship management, e-government and e-business.

Financial companies use automated business process to manage the automation of systems. Manufacturing companies use BPM to automate the supply chain. BPM depends on having the nodes of different applications achieve communication in a timely manner. If information is lost in a node, or bottlenecks occur, the BPM systems need to know that there are delays and send alerts to people denoted in the rules engines. BPM systems tend to be sophisticated implementations of process management, highly dependent of alert generation in a timely manner.

Customer response and supply chain modules represent significant aspects of business process management (BPM). BPM has achieved the ability to manage human interactions for process and to achieve application to application process implementation. Attaching information to rules in an automated manner means existing business IT systems can operate more efficiently.

Automation efficiency depends on process efficiency. Utility companies do not want to spend the \$6 billion to replace the existing IT system and endure the associated risk, they simply want to upgrade the existing CRM module so that the outage calls are handled more efficiently. This involves SOA systems integration implemented as BPM.

The integration needed to interconnect the CRM module to the IT core business system depends on process that is an essential aspect of new workload implementations.

The level of integration required a core broker that is available from IBM or Tibco and is not so easily managed by BPM companies with less integration core broker functionality. This gives these integration companies market strength. Adobe achieves its BPM market strength from document integration that then automates process.

BPM market driving forces relate to the need for automation of process. Information exchange depends on access to every different type of enterprise resource planning (ERP) system and network connectivity. Supply chains are automated using BPM technology based on integration infrastructure. Electronic commerce needs application servers and integration infrastructure to function.

Customer service systems need BPM to be implemented efficiently. Long running processes can be supported in a number of ways, but BPM is most efficient. Indirect factors relate to the migration of existing products from separate market segments. File transfer, CTI, applications development, and workflow illustrate the alternate ways to implement long running processes.

BPM is utilizing the architectures of SOA to develop component architecture in a manner that is consistent with efficient operations. Components do not work in tightly coupled stacks, they work as componentized aggregates of core functionality. The WebSphere MQ messaging broker is able to create separate, but equal aggregations of functionality that are kicked off as unique business processes built from components.

SOA does not work well in a stack, the components are no longer independent or reusable in a stack. SOA componentized architectures depend on asynchronous messaging that moves information as messages.

Services oriented architecture SOA is occurring in the context of corporate adoption of best-of-breed BPM strategies. Mergers, acquisitions, and reorganizations are increasing. The driving force is the need to leverage economies of scale brought by the Internet. A desire to develop closer links with customers, suppliers, and partners is also evolving. These events all drive demand for BPM. Applications, databases, operating systems, and hardware platforms depend on integration infrastructure and middleware messaging. Application servers blend seamlessly into networks supporting mainframes, client/server platforms, and PCs.

Companies trying to merge IT departments following a merger or acquisition need integration infrastructure. Those involved in front office/back office integration and those working to comply with new regulations all face the need to implement integration. BPM is emerging as a layer above integration infrastructure that guides process automation once integration has been put in place. Growth comes from the value provided by automated process. Automated process is at the heart of every enterprise. It is possible to run a very small business using manual process, say a small trucking firm using hand loading techniques, but try running a large distribution center or airline shipping package delivery service without automated process. It is not possible.

BPM promises to do more to eliminate manual process and give us control over exception management so that human intervention happens in an intelligent, efficient manner when it is needed. BPM has significant growth prospects for many years to come as markets are not anywhere near saturated.

All the BPM vendors have the capability to combine and recombine SOA components to create new processes using various aspects of model driven development tools. This use of SOA component driven architecture is set to spawn a new era of business optimization bringing massive amounts of productivity improvements.

As the productivity improves, fewer people are needed to perform jobs and the economy depends on innovation. Innovation is likely to come from renewable energy products that provide virtually free, virtually ubiquitous solar and wind generated energy.

With virtually free, universally available energy, the economy will enter a new era of innovation. In this instance, the culture of the US will provide enormous competitive advantage, because people are free to try new things without the fear of failure. Electric vehicles will proliferate, with every individual buying 3 or more personal vehicles. Just as a few years ago it was impossible to think about a person have more than one TV per household and now people have a TV in every room, so also people will have road cars, commuting cars, and family vehicles. All this will drive economic growth.

Solar and wind energy installations will require automated process for the smart grid. While thin film batteries proliferate to store the locally generated energy for personal vehicles, appliances, and lighting, the grid will provide significant amounts of energy as it does now, but from many different energy sources.

Personal responsibility for healthcare will be a significant innovation in the automation of process for medical care, providing significant change to the electronic patient record.

Business process management (BPM) and services oriented architecture engine markets at \$1.8 billion for licenses, maintenance, and services in 2008 are expected to reach \$6.2 billion by 2015. Products have a dashboard that supports ease of use for business analysts. The automation of process is what drives profitability for the enterprise.



Companies Profiled

Market Leaders

IBM
Adobe
Oracle / BEA
Software AG / webMethods
Tibco
Savvion
Software AG
Microsoft
Oracle
Pegasystems
Progress Software
Vitria Technology

Market Participants

Selected Business Process Management (BPM) Company Profiles

Appian
Fiorano
Fujitsu
FusionWare
Global 360
HandySoft
Lombardi
Metastorm
Hewlett Packard (HP)
PolarLake
Red Hat JBoss Enterprise SOA Platform
SOA Software
Sopra Group / Axway
Sword Group / Graham Technology
Workday / Cape Clear

Business Process Management (BPM) Market Shares, Strategies, and Forecasts, 2009-2015

REPORT METHODOLOGY

THIS IS THE 410TH REPORT IN A SERIES OF MARKET RESEARCH REPORTS THAT PROVIDE FORECASTS IN COMMUNICATIONS, TELECOMMUNICATIONS, THE INTERNET, COMPUTER, SOFTWARE, TELEPHONE EQUIPMENT, HEALTH EQUIPMENT, AND ENERGY. THE PROJECT LEADERS TAKE DIRECT RESPONSIBILITY FOR WRITING AND PREPARING EACH REPORT. THEY HAVE SIGNIFICANT EXPERIENCE PREPARING INDUSTRY STUDIES. FORECASTS ARE BASED ON PRIMARY RESEARCH AND PROPRIETARY DATA BASES. FORECASTS REFLECT ANALYSIS OF THE MARKET TRENDS IN THE SEGMENT AND RELATED SEGMENTS. UNIT AND DOLLAR SHIPMENTS ARE ANALYZED THROUGH CONSIDERATION OF DOLLAR VOLUME OF EACH MARKET PARTICIPANT IN THE SEGMENT. INSTALLED BASE ANALYSIS AND UNIT ANALYSIS IS BASED ON INTERVIEWS AND AN INFORMATION SEARCH. MARKET SHARE ANALYSIS INCLUDES CONVERSATIONS WITH KEY CUSTOMERS OF PRODUCTS, INDUSTRY SEGMENT LEADERS, MARKETING DIRECTORS, DISTRIBUTORS, LEADING MARKET PARTICIPANTS, OPINION LEADERS, AND COMPANIES SEEKING TO DEVELOP MEASURABLE MARKET SHARE. OVER 200 IN DEPTH INTERVIEWS ARE CONDUCTED FOR EACH REPORT WITH A BROAD RANGE OF KEY PARTICIPANTS AND INDUSTRY LEADERS IN THE MARKET SEGMENT. WE ESTABLISH ACCURATE MARKET FORECASTS BASED ON ECONOMIC AND MARKET CONDITIONS AS A BASE. USE INPUT/OUTPUT RATIOS, FLOW CHARTS, AND OTHER ECONOMIC METHODS TO QUANTIFY DATA. USE IN-HOUSE ANALYSTS WHO MEET STRINGENT QUALITY STANDARDS. INTERVIEWING KEY INDUSTRY PARTICIPANTS, EXPERTS AND END-USERS IS A CENTRAL PART OF THE STUDY. OUR RESEARCH INCLUDES ACCESS TO LARGE PROPRIETARY DATABASES. LITERATURE SEARCH INCLUDES ANALYSIS OF TRADE PUBLICATIONS, GOVERNMENT REPORTS, AND CORPORATE LITERATURE.

FINDINGS AND CONCLUSIONS OF THIS REPORT ARE BASED ON INFORMATION GATHERED FROM INDUSTRY SOURCES, INCLUDING MANUFACTURERS, DISTRIBUTORS, PARTNERS, OPINION LEADERS, AND USERS. INTERVIEW DATA WAS COMBINED WITH INFORMATION GATHERED THROUGH AN EXTENSIVE REVIEW OF INTERNET AND PRINTED SOURCES SUCH AS TRADE PUBLICATIONS, TRADE ASSOCIATIONS, COMPANY LITERATURE, AND ONLINE DATABASES. THE PROJECTIONS CONTAINED IN THIS REPORT ARE CHECKED FROM TOP DOWN AND BOTTOM UP ANALYSIS TO BE SURE THERE IS CONGRUENCE FROM THAT PERSPECTIVE.

THE BASE YEAR FOR ANALYSIS AND PROJECTION IS 2008. WITH 2008 AND SEVERAL YEARS PRIOR TO THAT AS A BASELINE, MARKET PROJECTIONS WERE DEVELOPED FOR 2009 THROUGH 2015. THESE PROJECTIONS ARE BASED ON A COMBINATION OF A CONSENSUS AMONG THE PRIMARY CONTACTS COMBINED WITH UNDERSTANDING OF THE KEY MARKET DRIVERS AND THEIR IMPACT FROM A HISTORICAL AND ANALYTICAL PERSPECTIVE. THE ANALYTICAL METHODOLOGIES USED TO GENERATE THE MARKET ESTIMATES ARE BASED ON PENETRATION ANALYSES, SIMILAR MARKET ANALYSES, AND DELTA CALCULATIONS TO SUPPLEMENT INDEPENDENT AND DEPENDENT VARIABLE ANALYSIS.

YOU MUST HAVE THIS STUDY

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Worldwide Business Process Management (BPM) Market Opportunities, Strategies, and Forecasts, 2009 to 2015

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ABOUT THE COMPANY

WINTERGREEN RESEARCH, HAS A UNIQUE RESEARCH STRATEGY THAT RELATES TO IDENTIFYING MARKET TRENDS THROUGH READING AND INTERVIEWING OPINION LEADERS. BY READING THE ELECTRONIC EQUIVALENT OF 40 FEET OF PAPER, WINTERGREEN RESEARCH SENIOR ANALYSTS CAN LEARN A LOT MORE ABOUT MARKETS, A LOT FASTER THAN CAN BE LEARNED THROUGH EXPENSIVE SURVEYS AND FOCUS GROUPS. THINKING ABOUT MARKET TRENDS IS A HIGH PRIORITY AT WINTERGREEN RESEARCH. AS WITH ALL RESEARCH, THE VALUE PROPOSITION FOR COMPETITIVE ANALYSIS COMES FROM INTELLECTUAL INPUT.

IT IS A LUXURY REALLY, AVAILABLE TO ONLY A VERY FEW PEOPLE, TO BE ABLE TO GATHER INFORMATION, LOTS OF INFORMATION FROM READING MASSIVE AMOUNTS OF CONTENT, AND THEN TRYING TO MAKE SENSE OF THAT CONTENT. THE ABILITY TO THINK ABOUT MARKET TRENDS IS ENHANCED BY DOING IT OVER AND OVER FOR MANY DIFFERENT MARKETS. THAT IS WHAT WINTERGREEN RESEARCH IS ALL ABOUT: READING AND THINKING IS AN ESSENTIAL ASPECT OF COMPETITIVE ANALYSIS. TALKING TO OPINION LEADERS IS THE THIRD ESSENTIAL ASPECT OF PRODUCING GOOD, RELIABLE DATA.

WINTERGREEN RESEARCH, FOUNDED IN 1985, PROVIDES STRATEGIC MARKET ASSESSMENTS IN TELECOMMUNICATIONS, COMMUNICATIONS EQUIPMENT, HEALTH CARE, INTERNET AND ADVANCED COMPUTER TECHNOLOGY. INDUSTRY REPORTS FOCUS ON OPPORTUNITIES THAT EXPAND EXISTING MARKETS OR DEVELOP MAJOR NEW MARKETS. THE REPORTS ASSESS NEW PRODUCT AND SERVICE POSITIONING STRATEGIES, NEW AND EVOLVING TECHNOLOGIES, AND TECHNOLOGICAL IMPACT ON PRODUCTS, SERVICES, AND MARKETS. MARKET SHARES ARE PROVIDED. LEADING MARKET PARTICIPANTS ARE PROFILED, AND THEIR MARKETING STRATEGIES, ACQUISITIONS, AND STRATEGIC ALLIANCES ARE DISCUSSED. THE PRINCIPALS OF WINTERGREEN RESEARCH HAVE BEEN INVOLVED IN ANALYSIS AND FORECASTING OF INTERNATIONAL BUSINESS OPPORTUNITIES IN TELECOMMUNICATIONS AND ADVANCED COMPUTER TECHNOLOGY MARKETS FOR OVER 30 YEARS.

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ABOUT THE PRINCIPAL AUTHORS

ELLEN T. CURTISS, TECHNICAL DIRECTOR, CO-FOUNDER OF WINTERGREEN RESEARCH, CONDUCTS STRATEGIC AND MARKET ASSESSMENTS IN TECHNOLOGY-BASED INDUSTRIES. PREVIOUSLY SHE WAS A MEMBER OF THE STAFF OF ARTHUR D. LITTLE, INC., FOR 23 YEARS, MOST RECENTLY AS VICE PRESIDENT OF ARTHUR D. LITTLE DECISION RESOURCES, SPECIALIZING IN STRATEGIC PLANNING AND MARKET DEVELOPMENT SERVICES. SHE IS A GRADUATE OF BOSTON UNIVERSITY AND THE PROGRAM FOR MANAGEMENT DEVELOPMENT AT HARVARD GRADUATE SCHOOL OF BUSINESS ADMINISTRATION. SHE IS THE AUTHOR OF RECENT STUDIES ON WORLDWIDE TELECOMMUNICATIONS MARKETS, THE TOP TEN INTERNET EQUIPMENT COMPANIES, THE TOP TEN CONTRACT MANUFACTURING COMPANIES, AND THE TOP TEN TELECOMMUNICATIONS MARKET ANALYSIS AND FORECASTS.

SUSAN EUSTIS, PRESIDENT, CO-FOUNDER OF WINTERGREEN RESEARCH, HAS DONE RESEARCH IN COMMUNICATIONS AND COMPUTER MARKETS AND APPLICATIONS. SHE HOLDS SEVERAL PATENTS IN MICROCOMPUTING AND PARALLEL PROCESSING. SHE HAS THE ORIGINAL PATENTS IN ELECTRONIC VOTING MACHINES. SHE HAS NEW PATENT APPLICATIONS IN FORMAT VARYING, MULTIPROCESSING, AND ELECTRONIC VOTING. SHE IS THE AUTHOR OF RECENT STUDIES OF THE SERVICES ORIENTED ARCHITECTURE SOA, MID IR SENSORS, CONTENT MANAGEMENT, MID SIZE BUSINESS MIDDLEWARE, WORLDWIDE ENERGY MARKETS, SOLAR UTILITY MARKETS, SOLAR TECHNOLOGY MARKETS, THIN FILM BATTERY MARKETS, WEBCAM MARKETS, REGIONAL BELL OPERATING COMPANIES' MARKETING STRATEGIES, INTERNET EQUIPMENT, BIOMETRICS, A STUDY OF INTERNET EQUIPMENT, WORLDWIDE TELECOMMUNICATIONS EQUIPMENT, TOP TEN TELECOMMUNICATIONS, DIGITAL LOOP CARRIER, WEB HOSTING, WEB SERVICES, NANOTECHNOLOGY, AND APPLICATION INTEGRATION MARKETS. MS. EUSTIS IS A GRADUATE OF BARNARD COLLEGE.

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