

WinterGreen Research, Inc.

Business Process Management (BPM) Cloud, Mobile, and Patterns: Market Shares, Strategies, and Forecasts, Worldwide, 2014 to 2020

Mountains of Opportunity



Picture by Susan Eustis

WinterGreen Research, Inc.

REPORT # SH25998219

625 PAGES

241 TABLES AND FIGURES

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WinterGreen Research, Inc.

Lexington, Massachusetts

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CHECK OUT THESE KEY TOPICS

Business Process Management (BPM) Cloud, Mobile, and Patterns Responsive to Shift to Interconnection Between Lines of Business

Business Process Management BPM
Smart Device Computing
BPM Apps
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
Services Oriented Architecture
SOA
Cloud Computing
SOA Application Middleware
SOA Forecasts
SOA Market Shares
Web Services
SOA Governance
SOA ESB
SOA Repository

SOA Directory
SOA Advances In Technology
Services Oriented Architecture (SOA)
Flexible Applications
Middleware
SOA Management
SOA Security
SOA Management
Monitor SOA
Manage SOA
Application Service Levels
SOA Business Process
SOA IT
SOA Flexible Response To Changing Market Conditions
Innovation For The Very Large Enterprises
SOA Innovation
Software Localization

Business Process Management – BPM - SOA - Cloud Computing – Mobile Growth Strategy: BPM Applications Middleware Makes IT Flexible, Responsive to The Line of Business, and Able to Grow the Business:

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Business Process Management (BPM), Cloud, Mobile, and Patterns: Market Shares, Strategies, and Forecasts, Worldwide, 2014-2020

LEXINGTON, Massachusetts (June 2, 2014) – WinterGreen Research announces that it has published a new study Business Process Management (BPM), Cloud, Mobile, and Patterns: Market Shares, Strategy, and Forecasts, Worldwide, 2014 to 2020. The 2014 study has 625 pages, 241 tables and figures. Worldwide markets are poised to achieve significant growth in the cloud computing realm. As people move to cloud computing and use their smart phones and tablets to access apps, exception management of business process becomes a significant aspect of doing business. Patterns are being used to control automated process better and interact with it in a more flexible manner, utilizing templates to control the repeatability of model creation.

Systems business process management software are providing automated process for achieving the ability to connect people across applications. Within the siloed lines of business BPM software capability extends the reach of everyone, it extends the access to information needed to do a job. As enterprises realize that automation of process is key to market growth BPM is creating new market opportunities.

IBM is the leader in business process management (BPM). IBM is the leader because it has invested in integration and analytics technology needed to achieve comprehensive IT systems implementation that achieves support for collaborative systems. The implementation of BPM depends on a broad set of process technology frameworks that interact seamlessly to achieve the end point integration needed to manage complexity of modern IT systems. IBM stands alone in the IT industry with that capability of managing complexity.

IBM SOA is used to implement cloud systems that stretch the boundaries of the enterprise to user end points, permitting marketing departments to target smartphones, implementing management decentralization and supporting user empowerment. SOA forms the base for business intelligence (BI) and analytics systems. It enables organizational ability to perform diagnostic analytics.

Business process management software provides the ability to connect people across applications within the BPM software capability. As enterprises realize that automation of process is key to market growth BPM is creating new market opportunities. Innovation depends on process automation. BPM software is critical to enabling solutions. Software is a strategic business asset used in every industry at every level. Software is necessary to provide automated process.

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According to Susan Eustis, lead author of the WinterGreen Research team that prepared the study, “Cloud computing, mobile computing, and smart devices represent the major forces impacting business process management (BPM) markets. IBM and others are leveraging patterns to gain competitive advantage in enterprise BPM markets. Managers use large BPM systems and small and mid-size business use the BPM cloud.”

Ms Eustis continued, “BPM is evolving cloud SaaS for business applications to accomplish work. The opportunity to implement apps that make automated process more responsive to the needs of customers, partners, suppliers, and distributors, people use business process management (BPM) as the need for automation tools to help workers is upon all of us.”

Business process management software is achieving the ability to connect people across applications. Within the siloed lines of business BPM software capability extends the reach of everyone, it extends the access to information needed to do a job. As enterprises realize that automation of process is key to market growth BPM is creating new market opportunities.

Innovation depends on process automation. BPM software is critical to enabling solutions that leverage automated process effectively. Software is a strategic business asset used in every industry at every level. Software is necessary to provide automated process.

IBM BPM platforms gained market share again as the company extended its functionality to encompass more cloud and address more of the process interactions that occur on an everyday basis in an enterprise. IBM is positioning to let people connect across the lines of business from within the business process applications. This ability to connect immediately is improving productivity. If the shipping department needs to talk to the order department, that can be done from within the business process management application.

Messaging and collaboration are key aspects of Business Process Management (BPM) making processes more efficient. When people can work things out as a problem occurs, then the delays are eliminated and the business runs far more efficiently.

Consideration of Business Process Management (BPM) Market Forecasts indicates that markets at \$3.4 billion will reach \$10 billion by 2020. Growth comes as automation of process adapts more efficiently to collaboration between people and provides interactive process based on exception management.

WinterGreen Research is an independent research organization funded by the sale of market research studies all over the world and by the implementation of ROI models that are used to calculate the total cost of ownership of equipment, services, and software. The company has 35 distributors worldwide, including Global Information Info Shop, Market Research.com, Research and Markets, electronics.ca, Bloomberg, and Thompson Financial. WinterGreen Research is positioned to help customers facing challenges that define the modern enterprises.

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The increasingly global nature of science, technology and engineering is a reflection of the implementation of the globally integrated enterprise. Customers trust wintergreen research to work alongside them to ensure the success of the participation in a particular market segment.

WinterGreen Research supports various market segment programs; provides trusted technical services to the marketing departments. It carries out accurate market share and forecast analysis services for a range of commercial and government customers globally. These are all vital market research support solutions requiring trust and integrity.

Key Words: 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 Oriented Architecture, SOA Application Middleware, SOA Forecasts, SOA Market Shares, Web Services, SOA Governance, SOA ESB, SOA Repository, SOA Directory, SOA Advances In Technology, Services Oriented Architecture (SOA) Flexible Applications Middleware SOA Management And Security, SOA Management, Monitor SOA , Manage SOA , Application Service Levels, SOA Business Process , SOA It, SOA Flexible Response To Changing Market Conditions, Innovation For The Very Large Enterprises, SOA Innovation, Services Oriented Architecture, SOA, Cloud Computing, Software Localization, <http://wintergreenresearch.com/reports/SOA%20Engines.html>, <http://wintergreenresearch.com/reports/BPM.html>

Companies Profiled

Selected Market Leaders

IBM
Microsoft
Fujitsu
Open Text
Software AG
Kofax / Singularity

PegaSystems
Adobe
Oracle
Tibco
EMC
PNMsoft

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Selected Market Participants

Actuate	Fujitsu	Lexmark / Perceptive
Adobe	Hewlett Packard	Software
Apache	HostBridge	Perficient
AgilePoint	Informatica / Active	PNMsoft
Appian	Endpoints	Progress Software
Attachmate	Intalio	Rally Software
Aurea	iWay Software	Red Hat
BizAgi	K2	Sage / HandisoftSOA
BizFlow	Kofax	Software
BonitaSoft	Layer 7	Wipro 5-168
CA Technologies	LexMark	Workday
CompuWare	OpenText	WSO2
Cordys	Managed Methods	VMWare
Crosscheck Networks	Nastel Technologies	360logica Software
EMC	NEC	Testing Company
Fabasoft	Newgen	
Fiorano	Novell	

**Business Process Management (BPM), Cloud, Mobile, and
Patterns: Market Shares, Strategies, and Forecasts, Worldwide,
2014 to 2020**

Report Methodology

This is the 599th report in a series of primary market research reports that provide forecasts in communications, telecommunications, the Internet, computer, software, telephone equipment, health equipment, and energy. Automated process and significant growth potential are a priority in topic selection. The project leaders take direct responsibility for writing and preparing each report. They have significant experience preparing industry studies.

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They are supported by a team, each person with specific research tasks and proprietary automated process database analytics. Forecasts are based on primary research and proprietary data bases.

The primary research is conducted by talking to customers, distributors and companies. The survey data is not enough to make accurate assessment of market size, so WinterGreen Research looks at the value of shipments and the average price to achieve market assessments. Our track record in achieving accuracy is unsurpassed in the industry. We are known for being able to develop accurate market shares and projections. This is our specialty.

The analyst process is concentrated on getting good market numbers. This process involves looking at the markets from several different perspectives, including vendor shipments. The interview process is an essential aspect as well. We do have a lot of granular analysis of the different shipments by vendor in the study and addenda prepared after the study was published if that is appropriate.

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.

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The base year for analysis and projection is 2011. With 2011 and several years prior to that as a baseline, market projections were developed for 2012 through 2018. These projections are based on a combination of a consensus among the opinion leader contacts interviewed 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. All analyses are displaying selected descriptions of products and services.

This research includes referencde to an ROI model that is part of a series that provides IT systems financial planners access to information that supports analysis of all the numbers that impact management of a product launch or large and complex data center. The methodology used in the models relates to having a sophisticated analytical technique for understanding the impact of workload on processor consumption and cost.

WinterGreen Research has looked at the metrics and independent research to develop assumptions that reflect the actual anticipated usage and cost of systems. Comparative analyses reflect the input of these values into models.

The variables and assumptions provided in the market research study and the ROI models are based on extensive experience in providing research to large enterprise organizations and data centers. The ROI models have lists of servers from different manufacturers, Systems z models from IBM, and labor costs by category around the world.

This information has been developed from WinterGreen research proprietary data bases constructed as a result of preparing market research studies that address the software, energy, healthcare, telecommunications, and hardware businesses.

YOU MUST HAVE THIS STUDY

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Business Process Management (BPM), Cloud, Mobile, and Patterns: Market Shares, Strategy, and Forecasts, 2014 to 2020

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Business Process Management (BPM), Cloud, Mobile, and Patterns Executive Summary

The study is designed to give a comprehensive overview of the Business Process Management (BPM) equipment market segment. Research represents a selection from the mountains of data available of the most relevant and cogent market materials, with selections made by the most senior analysts. Commentary on every aspect of the market from independent analysts creates an independent perspective in the evaluation of the market. In this manner the study presents a comprehensive overview of what is going on in this market, assisting managers with designing market strategies likely to succeed.

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IBM is helping clients from many industries implement Smarter Industry Solutions



Smarter Roads



Smarter Oil & Gas



Smarter Food



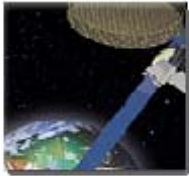
Smarter Healthcare



Smarter Utilities



Smarter Retail



Smarter Telco



Smarter Supply Chains



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Smarter Transportation



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*The next generation of business rules
technology brings accurate decision
automation and governance to improve
profitability, mitigate risk and ensure
compliance across the enterprise*



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TABLE 3-52

TIBCO BPM: STREAMLINED. OPTIMIZED. AUTOMATED. VISIBLE END-TO-END

- **Model-Driven Environment:** Provides powerful, easy-to-use tooling for standards-based modeling and developing business processes, viewing work lists, and monitoring running activity – no complex code, brittle rules, or restricting definitions are needed
- **Process Management:** Supports stateful business processes and stateless page flow processes. Processes are exposed as services and easily consume services to support reuse and composition.
- **Intelligent Work and Resource Management:** Enables work from multiple processes to be dynamically routed to the right person at the right time using rules (such as skills, position, and privileges). Also provides workflow patterns to ensure the right work gets to the right resource at the right time... the first time
- **SOA-Ready:** Business users can collaborate with architects and developers in the same environment to rapidly deliver agile, process-driven composite applications – reducing overall development cost and effort
- **Visual Analytics:** Interactive dashboards provide actionable insight into process performance and give business users direct access to customized results via self-service capabilities

Source: WinterGreen Research, Inc.

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ABOUT THE COMPANY

WinterGreen Research, research strategy relates to identifying market trends through reading and interviewing opinion leaders. By using analysis of published materials, interview material, private research, detailed research, social network materials, blogs, and electronic analytics, the market size, shares, and trends are identified. Analysis of the published materials and interviews permits WinterGreen Research senior analysts to learn a lot more about markets. Discovering, tracking, and 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.

WinterGreen Research, founded in 1985, provides strategic market assessments in telecommunications, communications equipment, health care, Software, Internet, Energy Generation, Energy Storage, Renewable energy, and advanced computer technology. Industry reports focus on opportunities that expand existing markets or develop major new markets. The reports access new product and service positioning strategies, new and evolving technologies, and technological impact on products, services, and markets. Innovation that drives markets is explored. 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.

The studies provide primary analytical insight about the market participants. By publishing material relevant to the positioning of each company, readers can look at the basis for analysis. By providing descriptions of each major participant in the market, the reader is not dependent on analyst assumptions, the information backing the assumptions is provided, permitting readers to examine the basis for the conclusions.

WinterGreen Research is positioned to help customers facing challenges that define the modern enterprises. The increasingly global nature of science, technology and engineering is a reflection of the implementation of the globally integrated enterprise. . Customers trust WinterGreen Research to work alongside them to ensure the success of the participation in a particular market segment.

WinterGreen Research supports various market segment programs; provides trusted technical services to the marketing departments. It carries out accurate market share and forecast analysis services for a range of commercial and government customers globally. These are all vital market research support solutions requiring trust and integrity.

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.

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Susan Eustis, President, co-founder of WinterGreen Research is a senior analyst. She 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 Solar RENEwable Energy, Wind Energy, Thin Film Batteries, Business Process Management marketing strategies, Internet equipment, biometrics, a study of Internet Equipment, Worldwide Telecommunications Equipment, Top Ten Telecommunications, Digital Loop Carrier, Web Hosting, Web Services, and Application Integration markets. Ms. Eustis is a graduate of Barnard College. Susan Eustis was named as top female executive of the year by Who's Who Worldwide in 2012.

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