
Business Process Assessment



Picture by Susie Eustis

SOARING THROUGH UNCERTAINTY

**Innovative and Comprehensive E-Business
Solutions to Problems**

WinterGreen Research, Inc.

Lexington, Massachusetts

www.wintergreenresearch.com

**BUSINESS PROCESS MANAGEMENT,
MARKET STRATEGIES AND FORECASTS,
2001 - 2006**

CHECK OUT THESE KEY TOPICS

TELECOMMUNICATION INDUSTRY RESTRUCTURING

Business Process Strategies

BUSINESS PROCESS AUTOMATION

Market Growth Opportunities

**INTEGRATION COMPONENTS, MARKETS, AND
TOOLS**

- WORLDWIDE MARKET FORECASTS

WORLDWIDE MARKET SHARES

E-BUSINESS

MARKET PARTICIPANTS

INTEGRATION SOFTWARE

MARKET DRIVING FORCES

REPORT METHODOLOGY

This is the Forty First report in a series of market research reports that provide forecasts in communications, telecommunications, the internet, computer, software, and telephone equipment. 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 participation in the segment. market share analysis includes conversations with marketing directors, distributors, leading market participants, 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 opinion leaders in the market segment.

BUSINESS PROCESS MANAGEMENT WILL INCREASE EFFICIENCY AND STREAM-LINE OPERATIONS

YOU MUST HAVE THIS STUDY

LUCENT EXECUTIVE SUMMARY

WINTERGREEN RESEARCH, INC.

Business Process Management Executive Summary

Markets Addressed By Business Process Management

Business Process Management Layer

Business Process Automation

Business Process Management Positioning

EDI and XML Transformation

Real-Time Business Process Monitoring And Analysis

E-Business Integration Server

Business Analyst Message Broker Market

Business Analyst Market Forecasts

BUSINESS PROCESS MANAGEMENT CAPABILITIES

1. Business Process Management (BPM) Capabilities

- 1.1 Business Process Management Benefits**
- 1.2 Modifying Business Processes**
- 1.3 Business Services**
- 1.4 Business Integration Market**
- 1.5 Business Integration Software**
- 1.6 Business Components**
- 1.7 Adapters And Transformation**
- 1.8 Technology And Application Connectors**
- 1.9 Development Toolset**
- 1.10 Infrastructure And System Management**
- 1.11 Trading Partner Portals**
- 1.12 Consumer Operations**
- 1.13 Rapid Response To Changing Business Conditions**

WINTERGREEN RESEARCH, INC.

- 1.14 Business E-Services Benefits**
- 1.15 E-Services Approach**
 - 1.15.1 E-Services Challenge**
 - 1.15.2 e-Services Partnering**
 - 1.15.3 Retail Portal Channels**
 - 1.15.4 E-Services Is The Business Model**
- 1.16 Business Process Management (BPM) capabilities**
- 1.17 Standard Process Definitions**
- 1.18 Driving Business Service Across The Internet**
- 1.19 Metadata Repository**
- 1.20 Business Process Execution Engine**
- 1.21 Repositories As A Critical Resource**
- 1.22 E-Business Engine**
- 1.23 Wrappering**
- 1.24 Service Level Management (SLM) Challenges**
- 1.25 Quality Of Service (QoS) Functions**
 - 1.25.1 QoS Different Levels Of Global Service**
 - 1.25.2 Network Efficiency**
- 1.26 RosettaNet Standardizing Supply Chain Processes**
- 1.27 Need For Automating Internal And External Processes**
- 1.28 Rapid, Reliable, Scalable Integration Solutions**
- 1.29 Integration Platforms**
- 1.30 Integration Software**
- 1.31 Role Of Mission Critical Middleware Messaging**
- 1.32 Mission-Critical Functionality**

1.33 Messaging Software

1.34 Linking Internal Operations

BUSINESS PROCESS MANAGEMENT FORECASTS

2. Business Process Management Market Forecasts

2.1 Business Process Management Market Trends

2.1.1 Business Process Management For Back End Systems

2.1.2 Business Process Integration

2.2 BPM Market Participants

2.2.1 Integration Of Business Processes

2.3 Business Analyst Message Broker Market

2.4 Business Analyst Market Forecasts

2.5 Event Management

2.6 Business Management

2.7 Enterprise Process Executive

2.8 Application Integration Market Analysis

2.9 Market Driving Forces

2.10 Application Integration Market Shares

2.11 (AI) Integration Broker Market Forecasts

2.11.1 AI Integration Broker Segment Market Analysis

AUTOMATION OF BUSINESS PROCESS

3. Automation Of Business Processes

3.1 Process Automation

3.2 Business Process Management

3.3 Vitria

WINTERGREEN RESEARCH, INC.

- 3.3.1 Vitria Positioning**
- 3.3.2 EDI and XML Transformation**
- 3.3.3 Vitria Real-Time Business Process Monitoring And Analysis**
- 3.3.4 Vitria's E-Business Integration Server / Attunity**
- 3.4 IBM**
 - 3.4.1 IBM / Prudential Insurance Company Of America Business Process Management**
- 3.5 Integration Of ERP Applications**
- 3.6 Automated Solutions Requirements**
- 3.7 Routing And Communication**
- 3.8 Message Brokers**
 - 3.8.1 MQSeries Integrator**
 - 3.8.2 IBM MQ Integrator V2**
 - 3.8.3 IBM Infrastructure For Dynamic, Real-Time, Application Network**
 - 3.8.4 Business Needs Define The Integration Connection**
 - 3.8.5 MQSeries Integrator Platforms**
- 3.9 Extricity**
 - 3.9.1 Extricity Integration Adapter Technology**
 - 3.9.2 Extricity B2B Platform**
 - 3.9.3 Extricity processes B2B**
 - 3.9.4 PricewaterhouseCoopers / Extricity**
- 3.10 Tibco Software**
 - 3.10.1 Tibco Suite Of Message Brokers**
 - 3.10.2 TIB Products**
 - 3.10.3 Tibco Active Enterprise**
 - 3.10.4 Tibco Active Exchange**

WINTERGREEN RESEARCH, INC.

- 3.10.5 **Tibco Extensibility**
- 3.10.6 **Tibco XML Support For Databases**
- 3.10.7 **Tibco XML Canon/Developer™**
- 3.11 **Neon / Sybase**
 - 3.11.1 **E-Business Enabling Software**
 - 3.11.2 **e-Business Integration Servers**
 - 3.11.3 **Neon Product Suite**
 - 3.11.4 **Neon Adapters**
 - 3.11.5 **Neon E-Commerce Solutions**
- 3.12 **HelioGraph**
 - 3.12.1 **Heliograph Business Process Management Product Positioning**
 - 3.12.2 **Heliograph Types Of Solution**
 - 3.12.3 **Heliograph Business Process Management Abilities**
 - 3.12.4 **Helio Components**
 - 3.12.5 **Straight Through Processing Of The Post-Trade Process**
 - 3.12.6 **Helio Tradeflow Business Benefits**
 - 3.12.7 **Helio Messaging Solution**
 - 3.12.8 **Helio Message Broker Business Benefits**
 - 3.12.9 **Helio EMX Tradeflow**
 - 3.12.10 **Helio Straight Through Exception Processing**
 - 3.12.11 **Helio Data Field Dictionary**
 - 3.12.12 **Helio Workstation Business Benefits**
- 3.13 **Helio Workstation Key Features**
- 3.14 **eVent**
- 3.15 **Data Collection**

- 3.16 **Instruction Request**
- 3.17 **Instruction Send**
- 3.18 **eVent Confirmation**
- 3.19 **eVent Features**
- 3.20 **eVent Benefits**
- 3.20.1 **IBM / Evoke Software**
- 3.21 **Level 8**
- 3.22 **CrossWorlds**
- 3.22.1 **Trading Partner Connections**
- 3.23 **B to B**
- 3.24 **Peregrine / Extricity**
- 3.24.1 **IBM Agreement With Extricity**

THE INTERNET AS A MARKET FORCE IN BUSINESS PROCESS MANAGEMENT

4. The Internet As A Market Force In Business Process Management

- 4.1 **Value Of The Internet For Business Process Management**
- 4.2 **Internet Use For Business Process Management**
- 4.3 **Global Economy**
- 4.3.1 **Intensifying Competition On A Global Scale**
- 4.4 **Liberalization Of Markets**
- 4.5 **Global Competitive Forces**
- 4.6 **Business Forces Driving Change**
- 4.6.1 **Pace Of Technological And Product Change**
- 4.6.2 **Response To Change**
- 4.6.3 **Change Management**
- 4.6.4 **Change In Integration Markets**

WINTERGREEN RESEARCH, INC.

- 4.7 **Internet Protocol (IP) Mission Critical Functionality**
- 4.8 **Broker Agent Architecture**
- 4.9 **AI Platforms**
- 4.10 **Operational Systems And Data Sources**
- 4.11 **Multicasting**
- 4.12 **B to B**
- 4.13 **Web-Based Applications**
- 4.14 **J2EE standards**
- 4.15 **Internet E-Business**
- 4.16 **Straight Through Processing**
- 4.17 **Business Analysis**
- 4.18 **AI Functions**
- 4.19 **Uses of AI Application Integration**
- 4.20 **AI Benefits**
- 4.21 **Integration System Architecture**
- 4.22 **Open Systems**
- 4.23 **Object-Oriented Methodology**
- 4.24 **Component Based Service-Oriented Architectures**
- 4.25 **Set Of IT Elements**
- 4.26 **Events**
- 4.27 **Event Transmission**
- 4.28 **Real Time Data Acquisition**
- 4.29 **Computer Telephony Integration (CTI)**
- 4.30 **Comprehensive SAN Solutions**
- 4.31 **Custom Coded Interface Logic**

BUSINESS PROCESS MANAGEMENT MARKET PROFILES

5. Business Process Management Company Profiles

5.1 Business Process Management Markets Addressed

5.2 bea

5.2.1 BEA Revenue

5.2.2 BEA Customers

5.3 CrossWorlds

5.3.1 CrossWorlds Customers

5.3.2 CrossWorlds Application Partners

5.3.3 The Business Integration Positioning

5.3.4 CrossWorlds Products And Technology

5.3.5 CrossWorlds Technology Partners

5.3.6 CrossWorlds Revenue

5.4 FileNET

5.5 GE Global Exchange (GXS)

5.5.1 GE Global eXchange Services

5.5.2 GXS Key Business Areas And Initiatives

5.5.3 GXS Strategic Alliances

5.6 IBM

5.6.1 IBM Software Infrastructure

5.6.2 IBM Software Revenue

5.6.3 Tivoli Systems

5.6.4 IBM Global Services

5.7 iPlanet

5.7.1 Forte Fusion Integration Suite

WINTERGREEN RESEARCH, INC.

- 5.7.2 Sun ONE**
- 5.7.3 iPlanet E-Commerce Solutions**
- 5.8 Inprise!**
- 5.9 Kabira Technologies**
- 5.10 level 8**
 - 5.10.1 Level 8 Acquisitions**
 - 5.10.2 Level 8 Products**
 - 5.10.3 Level 8 Systems Revenue**
- 5.11 Mercator**
 - 5.11.1 Mercator Software**
 - 5.11.2 Highlights**
 - 5.11.3 Mercator Products**
 - 5.11.4 Mercator Platforms**
 - 5.11.5 Mercator Customers**
- 5.12 Microsoft**
- 5.13 Oracle**
- 5.14 Peregrine**
 - 5.14.1 Peregrine Systems / Extricity**
 - 5.14.2 Extricity**
 - 5.14.3 Extricity / IBM WebSphere Business-To-Business Integrator Partner**
 - 5.14.4 Extricity Products**
- 5.15 Saga Systems**
- 5.16 SAP**
- 5.17 SeeBeyond**
 - 5.17.1 SeeBeyond Customers**

WINTERGREEN RESEARCH, INC.

5.17.2	Customers
5.17.3	Products
5.17.4	SeeBeyond Positioning
5.18	Software AG
5.19	S.W.I.F. T
5.20	Sybase / Neon
5.20.1	Sybase
5.20.2	Neon / New Era Of Networks
5.20.3	Combined Company
5.20.4	Sybase / Neon
5.20.5	Sybase Database
5.20.6	Neon Enables E-Business
5.20.7	Neon Customers
5.20.8	Other Neon Customers
5.20.9	Neon Revenues
5.20.10	Neon Product Positioning
5.20.11	Formatter
5.20.12	Rules Engines
5.20.13	Neon Core Products
5.20.14	Neon Partnerships
5.20.15	IBM agreement
5.20.16	Direct Sales
5.20.17	Strategic Relationships
5.21	Symantec
5.22	Talarian

WINTERGREEN RESEARCH, INC.

5.23	Tibco Software
5.23.1	Tibco Products
5.23.2	Tibco Customers
5.23.3	Tibco Software Revenue
5.23.4	Tibco Strategic Partners
5.23.5	Tibco Products
5.24	Vignette
5.24.1	Oberon Software
5.24.2	Oberon Resellers
5.25	Vitria
5.25.1	Vitria Revenues
5.25.2	Industries Served
5.25.3	Vitria Customers
5.25.4	Vitria Strengths And Challenges Of Application Integration
5.26	webMethods
5.26.1	WebMethods Customers
5.26.2	WebMethods' Strategic Partners
5.26.3	WebMethods Acquisitions
5.26.4	WebMethods Strategic Positioning
5.26.5	WebMethods / Active
5.26.6	Active Software
5.27	XMLSolutions

WINTERGREEN RESEARCH, INC.

**MANY OF THESE KEY TOPICS HAVE PHENOMENAL
SUBCATEGORIES**

LIST OF TABLES AND FIGURES

Market Forecasts 2000-2005

Market Shares 1999

Benefits Of Business Process Management Integration Platforms	2
Automation Of Business Processes Functions	4
Automation Of Business Processes By Location	5
Automation Of Business Processes Technology	5
Quality Of Service Measures	11
Process Analysis Functions	1
Benefits Of Business Process Management Products	4
Business Services Addressed By Applications Integration Components	6
Business Components Chained Together To Comprise A Business Service	9
Business Benefits Of Establishing An E-Services Approach	14
E-Services Positioning For Delivering It-Based Benefits	16
Principles Of Application Integration	17
E-Services Challenge	18
E-Services Systems Strategy	22
E-Services Positioning	22
E-Services	23
E-Services Market Positioning	24
E-Services Modular Strategy	25
E-Services Component Strategy	25
Business Process Complexity	26
Metadata Repository	28
Integration Platform Functions	40

WINTERGREEN RESEARCH, INC.

Application Integration Software Functions	42
Enterprise Messaging Integration Functions	44
Internal Enterprise Application Integration Tasks	47
Networked Business Systems Integration	3
Business Benefits of Business Process Management	4
Enterprise Back End System Management	5
Business Process Integration Advantages	6
Worldwide Integration Broker Markets, 2000	10
Business Process Engines Market	11
Business Process Engine Market Shares, 2000	12
Worldwide Business Process Engine Market Forecasts, 2000-2006	13
Business Process Engine Market Forecasts, 2000-2006	14
Advantages of EAI Applications Integration Solutions	17
AI Market Driving Forces	18
Application Integration Market Shares, 2000	20
Application Integration Broker, Market Forecast, 2000-2006	21
Summary Application Integration Broker Market Segment Forecast	22
Worldwide Integration Broker Market Segments	23
Worldwide Integration Broker Market	24
Automation Of Business Processes Functions	7
Automation Of Business Processes By Location	8
Automation Of Business Processes Technology	8

WINTERGREEN RESEARCH, INC.

Vitria Enterprise Credentials And Quality Of Service Measures	14
Process Analysis Functions	15
IBM / Prudential Insurance Company Of America Business Process Management Positioning	18
AI Routing Alternatives	22
MQSeries Integrator Software Functions	26
IBM Integration Systems Functions	28
IBM Integration Systems Architecture	30
IBM Strategy For Integrating Diverse Aspects Of Business	33
MQSeries Integrator Platforms	36
Extricity Extended Suite Of Integration Adapters	38
Extricity Functional Requirements B2B Platform	39
Tibco Product Lines	43
Tibco Target Markets	45
Tibco Product Positioning	46
TIBCO ActiveExchange Functions	48
Key Features Of Tibco XCD	52
XML Vocabularies, Grammars, And Component-Level Reuse	53
Tibco XML Distributed Collaboration Aims	53
Neon Target Markets	56
Neon Integration Product Suite	57
Neon Integration Engine	57
Neon Adapters	59
Health Care Transaction Types	61
HelioGraph Business Process Management Product Positioning	64
HelioGraph Types Of Solution	65

WINTERGREEN RESEARCH, INC.

Heliograph Business Process Management Abilities	67
Helio Workstation Key Benefits	77
eVent Features	81
CrossWorlds Unique End-To-End E-Business Integration Platform Solution	84
CrossWorlds' Solutions Benefits	85
Internet Market Driving Forces	5
Market Forces For Global Economy	7
Factors Impacting The Level Of Price And Product Competition	9
Competitive Forces	11
Response To Competition	12
Business Forces Driving Change	13
Response To Change	15
Business Services Index Business Services Definitions	16
Response To Change In Markets	18
Processing Extensions	19
B To B Systems Integration Tasks	23
Enterprise Application Integration Functions	28
Business Process In tegration Functions	29
Application Integration Uses	30
Enterprise Application Integration Benefits	31
Design Concerns For Integration System Architecture	33
Type Of Event Information	37
Event Management Definition	38
CTI Market Driving Forces	42

WINTERGREEN RESEARCH, INC.

CTI Equipment Market Segments	44
Comprehensive SAN Solutions	45
GXS Selected Strengths and Challenges of Application Integration	17
GXS EAI Solutions	19
IBM Selected Strengths And Challenges Of Middleware Messaging	22
Mercator Alliance Partners	35
SeeBeyond Partners	59
Sybase / Neon Selected Strengths and Challenges of Application Integration	64
Neon / Sybase Synergies	66
Neon Product Positioning	72
Neon New Era Of Networks Strategic Relationships	77
Neon Strategic Relationship With IBM	78
Neon Strategic Relationship With Microsoft	78
NEON Strategic Relationship With NTT Data Corporation	79
Neon Strategic Relationship With Commerce One	80
NEON Strategic Relationship With BroadVision	81
NEON Strategic Relationship With BEA Systems	81
Tibco Selected Market Strengths and Challenges in Application Integration	84
Oberon Resellers	91
Oberon Partners	93

ABOUT THE COMPANY

WinterGreen Research, founded in 1985, provides strategic market assessments in telecommunications, communications equipment, health care, and advanced computer technology. Industry reports focus on opportunities that will 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.

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 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 is the author of recent studies of the Regional Bell Operating Companies' marketing strategies, Internet equipment, a study of Internet Equipment, Worldwide Telecommunicaitons Equipment, Top Ten Telecommunications, Digital Loop Carrier, Web Hosting, and Application Integration markets. Ms. Eustis is a graduate of Barnard College.

ORDER FORM

**Return To: WinterGreen Research, Inc.
6 Raymond Street**

Lexington, MA 02421USA

Phone: (781) 863-5078 --- Fax: (781) 863-1235

WINTERGREEN RESEARCH, INC.

PLEASE ENTER MY ORDER FOR:

**BUSINESS PROCESS MANAGEMENT,
MARKET STRATEGIES AND FORECASTS,
2001 – 2006**

- *ALL REPORTS ARE AVAILABLE IN EITHER PRINT OR PDF* -

____ ENCLOSED IS MY CHECK FOR \$2800

____ PLEASE BILL MY COMPANY USING P.O.
NUMBER _____

____ PLEASE CHARGE MY MASTERCARD/VISA/AMERICAN EXPRESS--CARD NUMBER
____ EXP. DATE ____

____ ADDITIONAL COPIES, @ \$375 (EXTRA COPY PRICE IN EFFECT ONLY WITH INITIAL ORDER)

SIGNATURE **X** _____ DATE _____

NAME _____ TITLE _____

COMPANY _____ DIVISION _____

ADDRESS _____ CITY _____ STATE _____ ZIP _____

TELEPHONE _____ FAX _____

REPORT NO. B80310009619 300+ PAGES 125 TABLES AND FIGURES 2001 \$2,800

WINTERGREEN RESEARCH, INC.

EMAIL _____

PLEASE NOTE: RESIDENTS OF MASSACHUSETTS AND CONNECTICUT MUST INCLUDE APPROPRIATE SALES TAX

SUBSCRIBERS OUTSIDE THE UNITED STATES MUST PROVIDE PREPAYMENT IN U.S. FUNDS