

WINTERGREEN RESEARCH, INC.

**Business Process Management (BPM) Market
Opportunities, Strategies, and Forecasts, 2006 to 2012**

Business Process Management (BPM)



Picture by Susie Eustis

MOUNTAINS OF OPPORTUNITY

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

www.wintergreenresearch.com

REPORT # SH29821474

471 PAGES

152 TABLES AND FIGURES

2006

\$2,800

CHECK OUT THESE KEY TOPICS

BUSINESS PROCESS MANAGEMENT MARKET SHARES
BUSINESS PROCESS MANAGEMENT MARKET FORECASTS
Business Process Management Market Trends

Greater Value From Existing Assets

Modifying Business Processes
BPM Multiple Process Categories
BUSINESS PROCESS INTEGRATION MARKET
LINKING INTERNAL OPERATIONS
BPM MARKET ADVANTAGES
BUSINESS PROCESS MANAGEMENT TECHNOLOGY ISSUES
BPM SOFTWARE PROCESS DESIGN
MARKET NEEDS FOR BUSINESS PROCESS MANAGEMENT
BUILDING & IMPLEMENTING BUSINESS PROCESS WORKFLOWS
BPM BUSINESS BENEFITS
TECHNOLOGY PLATFORMS
BPM/WEB SERVICES/SOA

OPPORTUNITY ABOUNDS

WinterGreen Research, Inc.
Lexington, Massachusetts
www.wintergreenresearch.com

Business Process Management (BPM) Market Opportunities, Market Forecasts, and Market Strategies, 2006-2012

Business process management (BPM) aims for the achievement of greater value from existing software assets. IT investment allows the business process to be used to capture information electronically and automate services delivery. BPM is used to dynamically manage business logic with integrated application services. Business process management (BPM) is a central aspect of enterprise software.

BPM software challenges existing silo applications infrastructure to convert to real time processing. Conversion to 24x7 business processing imposes needs to achieve high availability, high reliability systems operations that are efficient.

Business process management products and integration architecture focus on permitting the business analyst to access and manage information relevant to the decision making process. Business process management provides an advantage to users because of a focus on business process automation across the enterprise and across trading partners, distributors, suppliers and customers.

Modular architecture allows customers to isolate their business processes from their applications, which gives them the flexibility to add, upgrade, or replace applications in their information technology environment without redefining all of their process interfaces.

Business process management relates to personal control of information. Personal control of information is facilitated by business process management designs that can be implemented as a processor peripheral to any existing computer. Business process management works to let people define the information they want out on a network, retrieve the information from a variety of places including the Internet, and operate on that information to perform useful tasks.

The business process management (BPM) market at \$1,065 million in 2005 is expected to more than triple to \$3.8 billion by 2012. The services oriented architecture (SOA) market at \$450 million in 2005 is expected to grow rapidly through 2012, reaching \$3.2 billion.

BPM process and compliance market forecast analysis indicates that productivity improvement continues to dominate markets throughout the forecast period.

Companies Profiled

Market Leaders

IBM
TIBCO
BEA

Market Participants

Sybase
AttachmateWRQ
Cape Clear
EMC Documentum
FileNet
Fujitsu
GXS
i2
Inovis
IONA
Kabira
MQ Software
Oracle
Progress Software
Savvion
Sun Microsystems
Vitria
Zebra Technologies

AmberPoint
BMC Software
CAPE Systems
Envoy Technologies
Fiorano
GoAhead
HP
Infravio
Interwoven
ItemField
Microsoft
Open Text
Pegasystems
SAP
SOA Software
Synergy Financial Systems
webMethods

Business Process Management (BPM) Strategies and Forecasts, 2006-2012

REPORT METHODOLOGY

THIS IS THE 284TH 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 PARTICIPATION 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. OUR RESEARCH INCLUDES ACCESS TO LARGE PROPRIETARY DATABASES. LITERATURE SEARCH INCLUDES ANALYSIS OF TRADE PUBLICATIONS, GOVERNMENT REPORTS, AND CORPORATE LITERATURE.

YOU MUST HAVE THIS STUDY

Business Process Management (BPM) Market Opportunities, Strategies, and Forecasts, 2006 to 2012

Table of Contents

BUSINESS PROCESS MANAGEMENT (BPM) EXECUTIVE SUMMARY

BUSINESS PROCESS MANAGEMENT (BPM) EXECUTIVE SUMMARY	ES-1
Greater Value From Existing Assets	ES-1
Business Process Management Benefits	ES-3
BPM Process Productivity and Compliance Market Forecasts	ES-8

BUSINESS PROCESS MANAGEMENT (BPM) MARKET DEFINITION AND MARKET DYNAMICS

1. BUSINESS PROCESS MANAGEMENT (BPM) MARKET DEFINITION AND MARKET DYNAMICS	1-1
1.1 Greater Value From Existing Assets	1-1
1.1.1 Business Process Management Benefits	1-3
1.1.2 Product Development Process	1-6
1.1.3 Provisioning Framework for BPM	1-6
1.1.4 Highly Available Services	1-10
1.1.5 Data Mapping For BPM	1-11
1.1.6 Data Mapping Phased Services Approach	1-11
1.1.7 Availability Assessment	1-12
1.1.8 Deploying BPM	1-13
1.1.9 BPM Features	1-15
1.1.10 Reliability and Serviceability	1-15
1.1.11 Rapid Response To Changing Business Conditions	1-16
1.2 Modifying Business Processes	1-17
1.3 Business Process Services	1-20
1.4 BPM Multiple Process Categories	1-22
1.4.1 Duration And Complexity BPM Process Categories	1-25
1.4.2 Transaction-Centric Processes	1-26
1.4.3 Person-To-Person Collaboration Processes	1-26
1.4.4 Automation	1-27
1.5 BPM Process Life Cycle	1-29
1.6 Workflow and BPM	1-31
1.7 Building And Implementing Business Process Workflows	1-32
1.7.1 BPM Challenges	1-33
1.8 Straight-Through Processing with Business Process Management	1-33
1.8.1 Form Filter	1-35
1.8.2 Rules-Based Routing	1-35
1.8.3 Timely Filing Logic	1-36
1.9 Business Process Integration Market	1-36
1.10 Customer Support	1-37
1.10.1 Business E-Services Benefits	1-38
1.10.2 E-Services Approach	1-39
1.10.3 E-Services Challenge	1-41
1.10.4 E-Services Partnering	1-43

1.10.5	Retail Portal Channels	1-45
1.10.6	E-Services Is The Business Model	1-45
1.10.7	Business Process Management (BPM) Capabilities	1-53
1.10.8	Business Process Execution Engine	1-55
1.10.9	E-Business Engine	1-56
1.10.10	Need For Automating Internal And External Processes	1-57
1.11	Rapid, Reliable, Scalable Integration Solutions	1-57
1.12	Role Of Mission Critical Middleware Messaging	1-62
1.12.1	Messaging Solutions	1-63
1.13	Linking Internal Operations	1-65
1.13.1	Business Process Management, BPM	1-67
1.13.2	Business-to-Business Integration, B2Bi	1-67
1.13.3	Enterprise Application Integration, EAI	1-67
1.13.4	Business Process Intelligence, BPI	1-68
1.13.5	Business Vocabulary Management, BVM	1-68
1.14	Market Needs For Business Process Management	1-68
1.15	Difference Between An Application Server And Application Integration	1-72
1.16	Difference Between Business Process Management (BPM) And Workflow	1-72
1.17	Business Process Management Customer Services Solutions	1-74
1.18	System Integrator Role	1-75
1.18.1	Targeting Vertical Markets	1-77
1.18.2	Strategic Alliances	1-77
1.19	Delivering Business Services Via The Web	1-78
1.19.1	Organization Central To The Ability To Move Forward With BPM Strategy	1-80
1.19.2	Organizational Changes	1-82

BUSINESS PROCESS MANAGEMENT (BPM) MARKET SHARES AND MARKET FORECASTS

2. BUSINESS PROCESS MANAGEMENT (BPM) MARKET SHARES AND MARKET FORECASTS	2-1	
2.1	Business Process Management	2-1
2.2	BPM Market Driving Forces	2-4
2.3	Business Process Management Market Shares	2-7
2.3.1	IBM Has Dominant Market Position	2-20
2.4	Business Process Management Market Forecasts	2-22
2.4.1	BPM Process Productivity and Compliance Market Forecasts	2-27
2.4.2	Business Process Management Productivity and Compliance	2-28
2.4.3	Sarbanes-Oxley	2-29
2.4.4	Process Workflow Market	2-29
2.5	E-Business	2-30
2.5.1	B To B	2-33
2.5.2	Global Exchange Services	2-36
2.5.3	Business Process Integration Advantages	2-36
2.6	EAI Regional Analysis	2-38
2.7	Event Management	2-40
2.8	Business Management	2-42
2.8.1	Enterprise Process Executive	2-42
2.9	BPM Market Advantages	2-43
2.10	Business Process Management Market Trends	2-44
2.10.1	Business Process Management For Back End Systems	2-46
2.10.2	Business Process Integration	2-50
2.10.3	BPM for Internal IT Departments	2-52
2.10.4	E-Business Infrastructure	2-53
2.11	Principal Competitive Factors In The BPM Market	2-54

2.12	Business Process Management (BPM)	2-59
------	-----------------------------------	------

BUSINESS PROCESS MANAGEMENT (BPM) SOFTWARE PRODUCT DESCRIPTION

3.	BUSINESS PROCESS MANAGEMENT (BPM) SOFTWARE PRODUCT DESCRIPTION	3-1
3.1	Business Process Management (BPM)	3-1
3.1.1	BPM Solutions	3-2
3.2	IBM Business Process Management (BPM)	3-4
3.2.1	IBM WebSphere Business Process Management Integration	3-4
3.2.2	IBM Business Process Management	3-7
3.2.3	IBM business process management products	3-9
3.2.4	IBM Business Process Management with SOA	3-11
3.2.5	IBM WebSphere Business Modeler	3-12
3.2.6	IBM WebSphere Integration Developer	3-13
3.2.7	IBM WebSphere Process Server	3-13
3.2.8	IBM WebSphere Business Monitor	3-14
3.2.9	IBM WebSphere Partner Gateway	3-15
3.2.10	IBM WebSphere Message Broker	3-16
3.2.11	IBM WebSphere Business Integration Collaborations	3-17
3.3	Tibco Business Process Management (BPM) Software	3-18
3.3.1	TIBCO Staffware Process Suite	3-18
3.3.2	TIBCO BusinessWorks	3-20
3.4	webMethods BPM	3-23
3.4.1	webMethods Business Activity Monitoring	3-24
3.4.2	webMethods Fabric	3-25
3.4.3	webMethods Modeler	3-26
3.4.4	webMethods Workflow	3-27
3.5	Vitria Business Process Management	3-27
3.5.1	Vitria BusinessWare	3-28
3.6	Fiorano Process Management and Workflow	3-31
3.6.1	Fiorano Business Integration Suite	3-31
3.6.2	Fiorano Event Process Orchestrator	3-31
3.7	Metastorm Roundtrip Business Process Management	3-32
3.7.1	Metastorm BPM Software Suite	3-33
3.8	Sun / SeeBeyond Business Integration	3-34
3.8.1	Sun / SeeBeyond Business Process Management	3-35
3.8.2	Sun SeeBeyond ICAN Suite 5.0	3-37
3.9	BEA AquaLogic BPM	3-42
3.9.1	BEA AquaLogic	3-43
3.9.2	BEA AquaLogic Interaction	3-45
3.9.3	BEA AquaLogic Interaction Process	3-46
3.9.4	BEA AquaLogic Interaction Composite Application Suite	3-47
3.9.5	BEA AquaLogic Business Service Interaction	3-47
3.9.6	BEA AquaLogic Data Services Platform	3-47
3.9.7	BEA AquaLogic Service Bus	3-50
3.9.8	BEA WebLogic and SOA	3-54
3.9.9	BEA AquaLogic Enterprise Security	3-54
3.9.10	BEA AquaLogic Service Registry	3-55
3.10	(BEA) FuegoBPM Suite	3-55
3.10.1	(BEA) Fuego Process Server	3-56
3.11	Savvion	3-57
3.11.1	Savvion Modernization Support	3-58

3.11.2	Savvion BusinessManager	3-60
3.11.3	Savvion Process Modeler	3-61
3.11.4	Savvion Process Asset Manager	3-61
3.11.5	Savvion BPM Studio	3-62
3.11.6	Savvion BPM Server	3-64
3.11.7	Savvion Business Rules	3-64
3.11.8	Savvion BPM Portal	3-65
3.12	Pegasystems	3-66
3.12.1	Pegasystems SmartBPM Suite	3-66
3.12.2	Pegasystems PegaRULES Process Commander	3-67
3.12.3	Pegasystems PegaRULES	3-68
3.13	Quovadx Business Process Management Services (BPMS)	3-70
3.14	FileNet Business Process Manager	3-71

BUSINESS PROCESS MANAGEMENT (BPM) TECHNOLOGY

4. BUSINESS PROCESS MANAGEMENT (BPM) TECHNOLOGY	4-1
4.1 Business Process Management Technology Issues	4-1
4.1.1 Application Integration Professional Services Implementation Strategies	4-2
4.1.2 Application Connectivity	4-2
4.1.3 Single Vendor Issues	4-3
4.1.4 Standards Adoption	4-4
4.2 BPM Technology Analysis	4-5
4.3 BPM Business Benefits	4-6
4.4 Technology Platforms	4-7
4.4.1 Automated Virtualization Of Existing Enterprise Assets	4-7
4.4.2 Complexity Of The Underlying IT Technologies	4-8
4.4.3 Impact of Platforms	4-9
4.4.4 Platforms and Disparate Technologies	4-10
4.5 Events	4-10
4.5.1 Event Transmission	4-13
4.5.2 Business Process Automation	4-14
4.6 Process-Oriented Architecture	4-17
4.6.1 Business Process Automation	4-17
4.6.2 Business Process Management Modular Architecture	4-17
4.6.3 Business Components	4-18
4.7 Advanced E-Business Infrastructure	4-21
4.7.1 Application Integration Technical Advantages	4-22
4.7.2 Integration System Architecture	4-23
4.8 Open Systems	4-25
4.8.1 SOA Adapters	4-25
4.9 Development Toolset	4-27
4.9.1 Infrastructure And System Management	4-28
4.10 BPM Software Process Design	4-28
4.10.1 Process Monitoring	4-29
4.10.2 Messaging as Part of Process Operation	4-29
4.11 BPM / Web Services / SOA	4-30
4.11.1 SOA Engine and Adapters Position Information As A Service	4-31
4.12 Services Oriented Applications (SOA) Unlock Business Value	4-39
4.12.1 Aligning Business Process And Technology	4-39
4.12.2 Business Process Challenges	4-40
4.12.3 Business Environment	4-40
4.13 Services Oriented Architecture (SOA) Ability To Transform Business	4-41

4.13.1	Services Oriented Architecture Works By Abstracting Business Processes	4-41
4.13.2	Enterprise Application Servers	4-42
4.13.3	Advantages Of Java In Context Of Application Integration	4-42
4.13.4	EAI Technology Heritage	4-43
4.14	Web Services	4-44
4.14.1	Promise Of Web Services	4-45
4.14.2	Microsoft .Net Framework	4-45
4.14.3	Java	4-46
4.14.4	Java Technology	4-48
4.14.5	J2EE	4-48
4.14.6	Soap	4-49
4.14.7	Apache Soap	4-50
4.14.8	Load Balancer With SSL Support	4-50
4.14.9	Points Of Failure	4-51
4.14.10	Soap Limitations	4-51
4.14.11	WSDL	4-54
4.14.12	WSDL Service Descriptions	4-55
4.14.13	UDDI	4-56
4.14.14	UDDI Test Registries	4-56
4.14.15	UDDI Distributed Web Service Discovery	4-57
4.14.16	UDDI Consortium	4-58
4.14.17	WS-Inspection Document Extensibility	4-58
4.14.18	XML	4-60
4.14.19	XSLT	4-61
4.14.20	Metadata Repository	4-61
4.14.21	Wrapping	4-63
4.14.22	Workflow Management Coalition	4-64
4.15	Service Level Challenges	4-65
4.15.1	Quality Of Service (QoS) Functions	4-65
4.15.2	Network Efficiency	4-67
4.15.3	RosettaNet Standardizing Supply Chain Processes	4-68
4.16	Business Need	4-70
4.16.1	Business Process Management Packaged Solutions for Rapid Deployment	4-70
4.16.2	Quality Of Service Control	4-71
4.16.3	BPM Transactional Finite-State Machines	4-71
4.16.4	XML Standards	4-75
4.17	Oasis	4-76

BUSINESS PROCESS MANAGEMENT (BPM) COMPANY PROFILES

5. BUSINESS PROCESS MANAGEMENT (BPM) COMPANY PROFILES	5-1
5.1 International Business Machines (IBM)	5-1
5.1.1 Description of Business	5-2
5.1.2 IBM's Strategy	5-2
5.1.3 Products and Services	5-3
5.1.4 IBM WebSphere	5-3
5.1.5 IBM and SAP	5-5
5.1.6 IBM Acquires DataPower	5-6
5.1.7 DataPower	5-7
5.1.8 DataPower's strategy	5-7
5.1.9 DataPower XG3 Product Family	5-8
5.1.10 IBM Acquires Ascential Software	5-8
5.1.11 Ascential	5-9

WINTERGREEN RESEARCH, INC.

5.1.12	IBM / Micromuse Inc.	5-10
5.1.13	IBM Acquires Bowstreet, Inc.	5-11
5.1.14	IBM 2006 First-Quarter Results	5-12
5.1.15	IBM Revenue 2005	5-13
5.2	Sybase	5-15
5.2.1	Products and Solutions	5-16
5.2.2	Services	5-16
5.2.3	Sybase / Solonde	5-16
5.2.4	Sybase Reports First Quarter Results	5-17
5.2.5	Sybase 2005 Revenue	5-18
5.3	TIBCO	5-19
5.3.1	TIBCO Products	5-20
5.3.2	Professional Services	5-21
5.3.3	Partners	5-21
5.3.4	HP/TIBCO	5-21
5.3.5	TIBCO / IDS Scheer	5-22
5.3.6	TIBCO Financial Data	5-22
5.3.7	Tibco 2005 Revenue	5-23
5.4	BEA	5-24
5.4.1	Partners	5-25
5.4.2	Customers	5-26
5.4.3	Products	5-27
5.4.4	BEA Acquires Fuego	5-28
5.4.5	BEA Acquires Plumtree Software	5-29
5.4.6	Plumtree software products	5-29
5.4.7	BEA First Quarter Results	5-30
5.4.8	BEA Revenue 2005	5-31
5.5	AmberPoint	5-31
5.5.1	AmberPoint/Software AG	5-33
5.5.2	AmberPoint/IONA	5-33
5.6	AttachmateWRQ	5-34
5.6.1	Legacy Integration	5-35
5.6.2	AttachmateWRQ/OpenSpan	5-35
5.6.3	AttachmateWRQ/NetIQ	5-36
5.6.4	NetIQ	5-37
5.7	BMC Software	5-39
5.7.1	BMC's Strategy	5-39
5.7.2	Mainframe Management	5-41
5.7.3	Distributed Systems Management	5-42
5.7.4	BMC/IDS Scheer	5-42
5.7.5	BMC/Identify	5-43
5.7.6	BMC Financial Data	5-44
5.8	Cape Clear	5-45
5.8.1	Partners	5-48
5.8.2	Cape Clear Solutions	5-48
5.8.3	Cape Clear/MrTed	5-49
5.9	CAPE Systems	5-50
5.9.1	Services	5-50
5.9.2	Solutions	5-50
5.9.3	Partners	5-51
5.9.4	Products	5-51
5.10	EMC Documentum	5-52

5.10.1	Products	5-52
5.10.2	Services	5-53
5.10.3	Solutions	5-53
5.10.4	EMC acquires nLayers	5-53
5.10.5	EMC acquires Interlink	5-54
5.10.6	EMC First Quarter Results	5-54
5.10.7	EMC Documentum 2005 Revenue	5-56
5.11	Envoy Technologies	5-56
5.11.1	Products	5-56
5.11.2	Partners	5-57
5.11.3	Customers	5-57
5.12	FileNet	5-58
5.12.1	Strategies	5-58
5.12.2	Customers and Markets	5-59
5.12.3	FileNet P8 Platform	5-60
5.12.4	Products	5-60
5.12.5	FileNet First Quarter 2006 Results	5-63
5.12.6	FileNet Revenue 2005	5-63
5.13	Fiorano	5-65
5.13.1	Products	5-66
5.13.2	Customers	5-67
5.13.3	Partners	5-67
5.13.4	Fiorano / Improvisive Technologies	5-68
5.13.5	Fiorano / IntegraSolv	5-69
5.13.6	Fiorano / Asidua	5-69
5.14	Fujitsu	5-70
5.14.1	Services	5-70
5.14.2	Products	5-71
5.14.3	Fujitsu Acquires Rapidigm	5-72
5.14.4	Fujitsu 2005 Revenue	5-72
5.15	GoAhead	5-73
5.15.1	Customers	5-74
5.15.2	Partners	5-74
5.15.3	Products	5-74
5.16	GXS	5-74
5.16.1	Industry	5-75
5.16.2	Products	5-76
5.16.3	Discussion of Strategy	5-76
5.16.4	Acquisitions	5-77
5.16.5	Partners	5-77
5.16.6	Customers	5-79
5.16.7	Microsoft / GXS	5-79
5.17	HP	5-80
5.17.1	Products	5-80
5.17.2	Consulting and Integration	5-81
5.17.3	HP Financial Data	5-81
5.17.4	HP 2005 Revenue	5-84
5.17.5	HP/TIBCO	5-84
5.18	i2	5-85
5.18.1	Distributed Fulfillment and Revenue Management.	5-85
5.18.2	Supply and Demand Synchronization	5-86
5.18.3	Products	5-86

WINTERGREEN RESEARCH, INC.

5.18.4	i2's Financial Data	5-87
5.18.5	i2 Revenue 2005	5-88
5.18.6	i2/RiverOne	5-88
5.19	Infravio	5-89
5.19.1	Partners	5-91
5.20	Inovis	5-91
5.20.1	Products	5-91
5.20.2	Inovis Acquires QRS Corporation	5-92
5.20.3	Partners	5-93
5.21	Interwoven	5-93
5.21.1	Products	5-94
5.21.2	Customers	5-96
5.21.3	Interwoven's Acquisitions	5-97
5.21.4	Interwoven's Financial Data	5-97
5.21.5	Interwoven 2005 Revenue	5-98
5.21.6	Interwoven / Data Builder	5-99
5.22	IONA	5-100
5.22.1	Products	5-100
5.22.2	Partners	5-100
5.22.3	IONA And Industria Form Strategic Partnership	5-101
5.22.4	IONA and Wipro Technologies Partner for SOA	5-101
5.22.5	IONA And Amberpoint Announce Integrated SOA Infrastructure Capabilities	5-101
5.22.6	IONA First Quarter 2006 Revenue	5-102
5.22.7	IONA 2005 Revenue	5-103
5.23	ItemField	5-103
5.23.1	Products	5-104
5.23.2	Partners	5-104
5.23.3	Customers	5-105
5.24	Kabira	5-107
5.24.1	Products	5-107
5.24.2	Customers	5-107
5.24.3	Partners	5-107
5.25	Microsoft	5-108
5.25.1	Business	5-108
5.25.2	Product Information	5-109
5.25.3	Microsoft BizTalk Server	5-110
5.25.4	Customers	5-112
5.25.5	Microsoft and GXS Form Strategic Alliance	5-112
5.25.6	SAP and Microsoft	5-113
5.25.7	Microsoft, SOFTBANK BB and Japan Telecom	5-113
5.25.8	Microsoft Reports Third-Quarter Results	5-114
5.25.9	Microsoft Revenue 2005	5-116
5.26	MQ Software	5-117
5.26.1	Products	5-117
5.26.2	Partners	5-118
5.26.3	Customers	5-118
5.26.4	Acquisitions	5-119
5.27	Open Text	5-119
5.27.1	Partners	5-120
5.27.2	Products and Solutions	5-120
5.27.3	Open Text Third Quarter 2006 Financial Results	5-121
5.27.4	Open Text 2005 Revenue	5-122

5.28	Oracle	5-122
5.28.1	Business	5-122
5.28.2	Recent Acquisitions	5-123
5.28.3	Products and Services	5-123
5.28.4	Oracle Acquires Oblix	5-125
5.28.5	Oblix Products and Services	5-126
5.28.6	Oracle Buys Open Source Software Company Sleepycat	5-126
5.28.7	Oracle's Third Quarter Results	5-127
5.28.8	Oracle Revenue 2005	5-128
5.29	Pegasystems	5-128
5.29.1	Partners	5-129
5.29.2	Customers	5-129
5.29.3	Products and Solutions	5-129
5.29.4	Pegasystems 2005 Revenue	5-130
5.30	Progress Software	5-131
5.30.1	Products	5-131
5.30.2	Partners and Customers	5-133
5.30.3	Progress Software/ NEON Systems	5-133
5.30.4	Progress Software Reports First Quarter Financial Results	5-134
5.30.5	Progress Software 2005 Revenue	5-135
5.31	SAP	5-135
5.31.1	Partners	5-135
5.31.2	Services	5-136
5.31.3	Solutions and Products	5-136
5.31.4	SAP Acquires Frictionless Commerce	5-137
5.31.5	SAP Acquires Virsa	5-137
5.31.6	SAP Revenue 2005	5-138
5.32	Savvion	5-139
5.32.1	Partners	5-139
5.32.2	Products	5-139
5.32.3	Solutions	5-139
5.33	SOA Software	5-141
5.33.1	Customers	5-141
5.33.2	Partners	5-141
5.33.3	Products	5-142
5.33.4	Solutions	5-142
5.33.5	SOA Software Acquires Blue Titan	5-142
5.33.6	Blue Titan Products	5-143
5.33.7	Blue Titan Customers	5-143
5.33.8	Blue Titan Partners	5-143
5.33.9	SOA Software 2005 Revenue	5-143
5.34	Sun Microsystems	5-144
5.34.1	Business Strategy	5-145
5.34.2	Products	5-145
5.34.3	Solutions	5-148
5.34.4	Sun / Aduva	5-149
5.34.5	Third Quarter Fiscal Year 2006 Results	5-149
5.34.6	Sun Microsystems Revenue 2005	5-150
5.35	Synergy Financial Systems	5-152
5.35.1	Synergy's Partners	5-153
5.35.2	Synergy's Customers	5-153
5.35.3	Synergy and TietoEnator	5-153

5.36	Vitria	5-154
5.36.1	Products	5-155
5.36.2	Vitria's Partners	5-157
5.36.3	Vitria / Volante	5-157
5.36.4	Vitria Financial Data	5-158
5.36.5	Vitria 2005 Revenue	5-159
5.37	webMethods	5-159
5.37.1	Products	5-159
5.37.2	Solutions	5-159
5.37.3	webMethods / Vinculum Japan	5-160
5.37.4	webMethods / Blue Agave Software	5-161
5.37.5	webMethods 2005 Revenue	5-163
5.38	Zebra Technologies	5-165
5.38.1	Zebra's Products	5-165
5.38.2	Customers	5-166
5.38.3	Zebra Financial Data	5-167
5.38.4	Zebra Technologies 2005 Revenue	5-167
5.38.5	Zebra/IBM	5-168

List of Tables and Figures

BUSINESS PROCESS MANAGEMENT (BPM) EXECUTIVE SUMMARY

Table ES-1	ES-2
Primary Aims Of Business Process Management (BPM)	
Table ES-2	ES-4
Benefits Of Business Process Management	
Figure ES-3	ES-5
Worldwide Business Process Management Engine Market Forecasts, 2006-2012	
Table ES-4	ES-6
Worldwide Business Process Management Engine Market Forecasts, 2006-2012	
Figure ES-5	ES-7
Worldwide Services Oriented Architecture (SOA) Engine Market Forecasts, 2006-2012	
Table ES-6	ES-8
Worldwide Services Oriented Architecture (SOA) Engine Market Forecasts, 2006-2012	
Table ES-7	ES-9
Business Process Management Market Forecasts, Software License, Dollars, 2006-2012	

BUSINESS PROCESS MANAGEMENT (BPM) MARKET DEFINITION AND MARKET DYNAMICS

Table 1-1	1-2
Primary Aims Of Business Process Management (BPM)	
Table 1-2	1-4
Benefits Of Business Process Management	
Table 1-3	1-5
Business Process Management (BPM) Software Challenges	
Table 1-4	1-9
Role Of Middleware In High Availability BPM Computing Systems	
Table 1-5	1-14
Core Components Of A High Availability Application Readiness Service	

Table 1-6	1-18
Business Process Services Issues	
Table 1-7	1-19
Issues Addressed By Business Process Management Systems	
Table 1-8	1-21
Business Services Addressed By BPM Components	
Table 1-9	1-23
BPM Process Categories	
Table 1-10	1-24
Business Process Complexity	
Table 1-11	1-38
Business Benefits Of Establishing An E-Services Approach	
Table 1-12	1-40
E-Services Positioning For Delivering It-Based Benefits	
Table 1-13	1-41
Principles Of Application Integration	
Table 1-14	1-43
E-Services Challenge	
Table 1-15	1-46
E-Services Partnering Strategy	
Table 1-16	1-47
E-Services Systems Strategy	
Table 1-17	1-48
E-Services Positioning	
Table 1-18	1-49
E-Services	
Table 1-19	1-50
E-Services Marketing Directions	
Table 1-20	1-50
BPM E-Services Market Positioning	
Table 1-21	1-51
E-Services Modular Strategy	
Table 1-22	1-52
E-Services Component Strategy	
Table 1-23	1-53
Business Process Complexity	
Table 1-24	1-59
Integration Platform Functions	
Table 1-25	1-61
Application Integration Software Functions	
Table 1-26	1-62
BPM Software Industries Targeted	
Table 1-27	1-64
Enterprise Messaging Integration Functions	
Table 1-28	1-66
Internal Enterprise Application Integration Tasks	
Table 1-29	1-69
Market Needs For Business Process Management	
Table 1-30	1-76
Key Elements Of BPM Strategy	
Table 1-31	1-79
Business Process Management (BPM) Initiatives Benefits	

BUSINESS PROCESS MANAGEMENT (BPM) MARKET SHARES AND MARKET FORECASTS

Table 2-1	2-5
BPM Market Driving Forces	
Figure 2-2	2-8
Worldwide Business Process and SOA Engine License, Services, and Maintenance Market Shares, 2005	
Table 2-3	2-9
Worldwide Business Process and SOA Engine License, Services, and Maintenance Market Shares, 2005	
Figure 2-4	2-10
Worldwide Business Process Engine License, Services, and Maintenance Market Shares, 2005	
Table 2-5	2-11
Worldwide Business Process Engine License, Services, and Maintenance Market Shares, 2005	
Figure 2-6	2-12
Worldwide Services Oriented Architecture (SOA) Market Shares, 2005	
Table 2-7	2-13
Worldwide Services Oriented Architecture (SOA) Market Shares, 2005	
Figure 2-8	2-15
Worldwide Business Process and SOA Engine License, Services, and Maintenance Market Shares, First Half 2006	
Table 2-9	2-16
Worldwide Business Process and SOA Engine License, Services, and Maintenance Market Shares, First Half 2006	
Figure 2-10	2-17
Worldwide Business Process Engine License, Services, and Maintenance Market Shares, First Half 2006	
Table 2-11	2-18
Worldwide Business Process Engine License, Services, and Maintenance Market Shares, First Half 2006	
Table 2-12	2-20
Application Integration (EAI) Company Analysis of Market Segments, Software License and Maintenance, Percent, 2005	
Table 2-13	2-21
Application Integration (EAI) Company Analysis of Market Segments, Software License and Maintenance, Dollars, 2005	
Figure 2-14	2-22
Worldwide Business Process Management and SOA Engine Market Forecasts, 2006-2012	
Table 2-15	2-23
Worldwide Business Process Management and SOA Engine Market Forecasts, 2006-2012	
Figure 2-16	2-24
Worldwide Business Process Management Engine Market Forecasts, 2006-2012	
Table 2-17	2-25
Worldwide Business Process Management Engine Market Forecasts, 2006-2012	
Figure 2-18	2-26
Worldwide Services Oriented Architecture (SOA) Engine Market Forecasts, 2006-2012	
Table 2-19	2-27
Worldwide Services Oriented Architecture (SOA) Engine Market Forecasts, 2006-2012	
Table 2-20	2-28
Business Process Management Market Forecasts, Software License, Dollars, 2006-2012	
Figure 2-21	2-32
Worldwide Internet User Forecasts, 2006-2012	
Table 2-22	2-33
Worldwide Internet User Forecasts, 2006-2012	

Figure 2-23	2-34
E-Commerce B to B Market Forecasts, 2006-2012	
Table 2-24	2-35
E-Commerce B to B Market Forecasts, 2006-2012	
Table 2-25	2-37
Business Process Integration Advantages	
Figure 2-26	2-39
Worldwide Application Integration (EAI) Regional Analysis, 2005	
Table 2-27	2-40
Application Integration (EAI) Regional Market Shares, 2005	
Table 2-28	2-43
Advantages Of BPM Solutions	
Table 2-29	2-45
BPM Functions	
Table 2-30	2-47
Business Benefits Of Business Process Management	
Table 2-31	2-49
Enterprise Back End System Advantages From Business Process Management	
Table 2-32	2-51
Business Process Integration Advantages	
Table 2-33	2-53
E-business Infrastructure Software Requirements	
Table 2-34	2-55
Principal Competitive Factors In The BPM Market	
Table 2-35	2-57
Specific Areas Of BPM Functionality	
Table 2-36	2-61
BPM Infrastructure Functions	
Table 2-37	2-62
Scope Of A Business Process	

BUSINESS PROCESS MANAGEMENT (BPM) SOFTWARE PRODUCT DESCRIPTION

Table 3-1	3-2
Elements of Business Process Management	
Table 3-2	3-8
IBM BPM Tools	
Table 3-3	3-9
Definition of Business Process Management	
Table 3-4	3-10
Core products of IBM Business Process Management	
Table 3-5	3-11
IBM Business Process Management with SOA	
Table 3-6	3-14
IBM WebSphere Business Monitor	
Table 3-7	3-15
IBM WebSphere Partner Gateway V6.0	
Table 3-8	3-19
TIBCO Staffware Process Suite Components.	
Table 3-9	3-21
TIBCO Business Works	

Table 3-10	3-22
TIBCO Business Works Features	
Table 3-11	3-23
webMethods Business Process Management	
Table 3-12	3-24
webMethods Business Activity Monitoring	
Table 3-13	3-25
webMethods Fabric	
Table 3-14	3-28
Vitria BPM Strategies	
Table 3-15	3-29
Vitria BusinessWare Benefits	
Table 3-16	3-30
Vitria BusinessWare Capabilities	
Table 3-17	3-32
Fiorano Even Process Orchestrator	
Table 3-18	3-33
Metastorm BPM Software Suite	
Table 3-19	3-36
Sun / SeeBeyond Business Process Management Functions	
Table 3-20	3-38
Sun/SeeBeyond ICAN 5 Suite Components	
Table 3-21	3-45
BEA AquaLogic Family Functions	
Table 3-22	3-46
BEA New Solution Platform	
Table 3-23	3-48
BEA AquaLogic Data Services Platform Functions	
Table 3-24	3-50
BEA AquaLogic Data Services Platform	
Table 3-25	3-51
BEA AquaLogic Service Bus IT Benefits	
Table 3-26	3-53
Bea AquaLogic Service Bus	
Table 3-27	3-57
Fuego Process Server	
Table 3-28	3-60
The segments of BusinessManager	
Table 3-29	3-62
Features of Savvion Process Asset Manager	
Table 3-30	3-63
Savvion BPM Studio features	
Table 3-31	3-66
Components of SmartBPM Suite	
Table 3-32	3-69
Pegasystems PegaRULES Enterprise Rules Engine Features	
Table 3-33	3-70
Pegasystems PegaRULES Rule Types	
Table 3-34	3-72
The features of FileNet Business Process Manager	

BUSINESS PROCESS MANAGEMENT (BPM) TECHNOLOGY

Table 4-1	4-11
Type Of Event Information	
Table 4-2	4-12
Event Management Definition	
Table 4-3	4-16
Integration Services	
Table 4-4	4-18
Business Components Chained Together To Comprise A Business Service	
Table 4-5	4-20
Integration Services	
Table 4-6	4-24
Design Concerns For Integration System Architecture	
Table 4-7	4-32
SOA Engine Manages Information Access To Create A Service	
Table 4-8	4-33
Services Oriented Architecture To Achieve Flexible Infrastructure	
Table 4-9	4-34
Services Oriented Architecture Line Of Business Positioning	
Table 4-10	4-35
Services Oriented Architecture Business Process Efficiency	
Table 4-11	4-35
Services Oriented Architecture Business Process Challenges	
Table 4-12	4-37
Services Oriented Architecture Business Process Risk Management	
Table 4-13	4-38
Services Oriented Architecture Business Process Improvements	
Table 4-14	4-53
Soap-Based Web Service Production Environment Testing	
Table 4-15	4-61
XSLT Transformation Of XML	
Table 4-16	4-62
Metadata Repository	
Table 4-17	4-73
BPML E-Business Processes	

BUSINESS PROCESS MANAGEMENT (BPM) COMPANY PROFILES

Table 5-1	5-4
WebSphere Product Categories	
Table 5-2	5-27
BEA Product Categories	
Table 5-3	5-32
AmberPoint's Partners	
Table 5-4	5-46
Cape Clear Product	
Table 5-5	5-47
Cape Clear Customers	
Table 5-6	5-51
CAPE System's Partners	

Table 5-7	5-57
Envoy's Products	
Table 5-8	5-61
FileNet's ECM suites	
Table 5-9	5-62
FileNet P8 Technologies	
Table 5-10	5-66
Fiorano's Products	
Table 5-11	5-68
Fiorano Partner Categories	
Table 5-12	5-71
Fujitsu's Products Categories	
Table 5-13	5-78
GXS' Partners	
Table 5-14	5-90
Infravio's Products	
Table 5-15	5-92
Inovis' Products	
Table 5-16	5-94
Interwoven's Solutions	
Table 5-17	5-108
Microsoft business divisions	
Table 5-18	5-111
BizTalk Server Industries	
Table 5-19	5-117
MQ Software's Products	
Table 5-20	5-120
Open Text's Solution's Categories	
Table 5-21	5-132
Progress Software's Product Categories	
Table 5-22	5-140
Savvion's Solutions Categories	
Table 5-23	5-146
Sun's Product Categories	
Table 5-24	5-155
BusinessWare's Capabilities	
Table 5-25	5-162
webMethods and Blue Agave Partnership User Benefits	
Table 5-26	5-166
Zebra's Printers	

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.

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 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, AND APPLICATION INTEGRATION MARKETS. MS. EUSTIS IS A GRADUATE OF BARNARD COLLEGE.

WINTERGREEN RESEARCH, INC.

ORDER FORM

Return To: WinterGreen Research, Inc.
6 Raymond Street
Lexington, MA 02421 USA
Phone: (781) 863-5078 --- Fax: (781) 863-1235 or (781) 860-0897

PLEASE ENTER MY ORDER FOR:

**Business Process Management (BPM)
Market Opportunities, Strategies, and
Forecasts 2006-2012**

-ALL REPORTS ARE AVAILABLE IN EITHER PRINT OR PDF-

PDF PRINT

___ ENCLOSED IS MY CHECK FOR \$2,800 FOR SINGLE COPY, \$3,800 FOR WEB SITE POSTING

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

___ PLEASE CHARGE MY MASTERCARD/VISA/AMERICAN EXPRESS___

CARD NUMBER _____ EXP. DATE _____

If charging to a Credit card you may e-mail the order form, but not the card information

Fax or Call with credit card information - Do not send card number as e-mail - You may send the order as e-mail

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

NAME _____ TITLE _____

SIGNATURE _____

COMPANY _____ DIVISION _____

-

ADDRESS _____

CITY _____ STATE /

ZIP _____

TELEPHONE _____

FAX _____

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

REPORT # SH29821474

471 PAGES

152 TABLES AND FIGURES

2006

\$2,800